

The logo features a dark grey vertical bar on the left side, with a white curved shape on its right edge. The word "SmartOffice" is written vertically in a bold, sans-serif font. "Smart" is in solid black, while "Office" is in a white outline. A registered trademark symbol (®) is located at the top right of the word "Office".

SmartOffice[®]



Filters, Sets and Dynamic Reports User Guide

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Introduction

This document is an overview used to gain a basic understanding of the navigation, terminology, and logic of filters, sets, and dynamic reports.

Overview

Filters

A database management system such as SmartOffice can hold large amounts of data. Without filters, the time required to examine large numbers of records in order to identify those that share a common characteristic would defeat the purpose of using advanced technology for managing information.

A filter reads the entries in at least one column of the records and compares these entries with an entry that is designated as the search criterion. Records possessing entries that match the search criteria are identified and listed. There are a variety of operations based on Boolean algebra and set theory that can be applied to make the filtration more efficient and flexible.

In SmartOffice, there are two types of filters: filter records and single-use filters. Filter records are database records that are used to filter other database records. Specific tables, columns, criteria, and operators are all stored for subsequent use at various strategic positions within SmartOffice (usually Search dialog boxes). By contrast, single-use filters are most often used on the summary spreadsheet pages that are used to list records. Single-use filters are often limited to the currently open summary page and are restricted to only one column of the summary list. Single-use filter entries cannot be saved.

Sets

Sets provide an additional record-grouping utility that filters cannot provide. Without sets, there would be no way to conveniently define and access a group of records which bear no similarity discernable to the database. Sets are created and stored in the system as set records.

Use sets to group records for target marketing purposes such as pre-approach mailings or seminar invitations. Records can be placed into sets using filters or by individual selection. The usefulness of sets becomes apparent when a set is composed partially by a filter and partly by ad-hoc selection, creating a group of records that could not have been composed by use of filters alone.

You can freely add records to or remove records from a set and validate the set manually or automatically. Any of the allowed record types can be a member of any number of different sets.

Dynamic Reports

Dynamic Reports is a powerful reporting method that is used to specify customizable report information.

Requirements

SmartOffice includes predefined system filters and dynamic reports. Only System Office users can define and modify this information. The system filters and dynamic reports are highlighted in cyan. Regular filters and dynamic reports are created, displayed, modified, and deleted by all users within the same office.

Navigation

Filters

Navigating to the Filter Summary Spreadsheet

1. Click the **Marketing** menu item and then select **Filters** from the expanded list to open the Search Filters dialog box.
2. Click **Search** without entering any search criteria to display the Filter Summary list.

Filter Summary + [Copy] [Delete] [Tag All] [Filter Records] [Unfilter Records] [Print Spreadsheet] [Customize Layout]

Category	Filter Name	Description	Created On
<input type="checkbox"/> Contact - Individual	(Auto Or Home) And No Life	Has auto or homeowner policy but has no life policy	10/19/2001
<input type="checkbox"/> Group Policy	30 Day Renewal - Group	Group Policies Renewing within 30 days	12/03/2001
<input type="checkbox"/> Contact - Individual	30th Birthday In Next 30 Days	All contacts having their 30th birthday in the next 30 days	10/19/2001
<input type="checkbox"/> Contact - Individual	50 And Older	All contacts aged 50 and up	10/19/2001
<input type="checkbox"/> Insurance Policy	90 Day Renewal - Term	Term Policies Renewing within the next 90 Days	07/20/2001
<input type="checkbox"/> Calendar Activity	Active Calls	All Calls which are Active	01/22/2001
<input type="checkbox"/> Calendar Activity	Activities Today	All activities for the current day	07/23/2001
<input type="checkbox"/> Calendar Activity	Activities: Previous 7 Days	Activities: Previous 7 Days	07/25/2001
<input type="checkbox"/> Calendar Activity	Activity Priority = Important	Important Activities	07/25/2001
<input type="checkbox"/> Calendar Activity	Activity Status = Discontinued	Discontinued Activities	07/19/2001
<input type="checkbox"/> Calendar Activity	Activity Status = Done	Activities marked Done	07/19/2001
<input type="checkbox"/> Contact - Individual	All Clients	Type = Client	10/19/2001
<input type="checkbox"/> Contact - Individual	All Dependents Or Clients	Type = dependents or clients	10/19/2001
<input type="checkbox"/> Calendar Activity	Appointments Only	Type =Appointment	07/26/2001
<input type="checkbox"/> Contact - Individual	Auto - Home No Umbrella	Has auto and home no umbrella	10/19/2001
<input type="checkbox"/> Contact - Individual	Auto No Home	Contacts with Auto but no Home insurance	12/10/2001
<input type="checkbox"/> Insurance Policy	Basic Face > 90K	Basic Face > 90K	07/25/2001
<input type="checkbox"/> Contact - Individual	Birthdays In Next 30 Days	Birthdays in the next 30 days	10/19/2001
<input type="checkbox"/> Contact - Individual	Birthdays Next Calendar Month	Birthdays for all contacts in next calendar month	10/19/2001
<input type="checkbox"/> Contact - Individual	Birthdays This Calendar Month	Birthdays for all contacts in this calendar month	10/19/2001

Previous Page 1 Next Page **Total: 99 (Click here to list all)**


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- **Add:** Click this button to add a new filter.
- **Copy:** Click this button to copy an existing filter.
- **Delete Record(s):** Click this button to delete selected records from the summary list.
- **Tag All:** Click this button to select all records in the Filter Summary list.
- **Filter Records:** Click this button to specify a filter option for the records in the spreadsheet.
- **Unfilter Records:** Click this button to clear an existing filter.
- **Print Spreadsheet:** Click this button to print the Filter Summary spreadsheet.
- **Customize Layout:** Click the **Customize Layout** button to customize the details that should display in the spreadsheet. The user can select which columns to display, specify a width for each column, define sort order, set truncation, subtotal and total specified columns.
- **Spreadsheet Export:** Click this button to export the data in the spreadsheet to CSV, XML, or TAB Separated format. MS Word, MS Excel, Web Browsers and Notepad are used to display exported data.

Sets

Navigating to the Set Summary Spreadsheet

1. Click the **Marketing** menu item and then select **Sets** from the expanded list to open the Search Sets dialog box.
2. Click **Search** to display the Set Summary spreadsheet.

Set Summary 

Set Name	Description	Member	Filter Only	Created On	Modified On
<input type="checkbox"/> A Clients	List Of A SubType Clients	50	Yes	02/13/2001	10/27/2001
<input type="checkbox"/> A-H	Last Name Starts With A - H	145	No	01/10/2002	05/22/2003
<input type="checkbox"/> A=Client Apprec.Event - Golf '03	A = Client Appreciation Event - Golf 2003	0	No	01/07/2003	
<input type="checkbox"/> Advisor Mailing List	Monthly Mailing	2	No	09/13/2002	10/10/2002
<input type="checkbox"/> Age 50 And Over	List Of Contact Ages 50 And Over.	83	Yes	02/15/2001	10/27/2001
<input type="checkbox"/> Agents	Agents	0	No	04/20/2001	04/20/2001
<input type="checkbox"/> B = Nice Pen - Labels 2003		0	No	01/07/2003	
<input type="checkbox"/> Clients	Type = Clients	112	Yes	04/04/2002	04/04/2002
<input type="checkbox"/> College Education Funding	College Education Funding	7	No	01/22/2003	
<input type="checkbox"/> Homeowner	Client That Has HomeOwner Policy	26	No	08/29/2001	10/27/2001
<input type="checkbox"/> I-M	Last Name Starts With I - M	53	No	01/10/2002	05/22/2003
<input type="checkbox"/> List Of Qualified Suspects	Type = Qualified Suspects	18	Yes	02/15/2001	10/30/2002
<input type="checkbox"/> Married Policy Holders	List All Married Policyholders.	50	No	02/14/2001	10/27/2001
<input type="checkbox"/> Monthly Newsletter List	Contacts Who Receive The Monthly Newsletter	9	No	07/12/2001	04/12/2002
<input type="checkbox"/> Non Client	Type Not Equal To Client	257	Yes	12/03/2001	04/12/2002
<input type="checkbox"/> Party Invitation List	Party Invitation List	6	No	07/12/2001	04/12/2002
<input type="checkbox"/> Prospects	Type = Prospects	16	Yes	02/13/2001	10/27/2001
<input type="checkbox"/> Prospects 50 And Over		5	Yes	01/24/2003	

Records Shown: 23 Total Records: 23

- **Add:** Click this button to add a new set.
- **Add New Members to the Tagged Sets:** Select the appropriate record(s) and then click this button to add members to the set(s).
- **Go to Contact Summary:** Select a set and then click this button to display the Individual Contact Summary list of set members.
- **Delete Record(s):** Click this button to delete the selected record(s).
- **Tag All:** Click this button to select all records.
- **Filter Records:** Click this button to specify a filter option.
- **Unfilter Records:** Click this button to clear an existing filter.
- **Print Spreadsheet:** Click this button to print the spreadsheet.
- **Customize Layout:** Using the **Customize Layout** button, users can customize the set details that will display in the spreadsheet. The user can select the columns to display, specify a width for each column, define sort order, set truncation, subtotal and total specified columns.
- **Spreadsheet Export:** Use this button to export the data in the spreadsheet to CSV, XML, or TAB Separated format. MS Word, MS Excel, Web Browsers and Notepad can be used to display the exported data.
- **Marketing Options:** Select a set and then click this button to open the Marketing Options dialog box.
- **Validate Tagged Sets:** Select one or more sets and then click this button to validate the sets.

Navigating to the Set Summary Dialog Box

1. From an open Contact Summary list, select a record and then click the **Add to Set** button to open the Search Sets dialog box.
2. Without entering any search criteria, click **Search** to open the Set Summary dialog box.
3. Select the appropriate set(s) and then click **OK**; or, click **Add** to create a new set.

Navigating to the Set Member Summary List

1. From the Set Summary list, select a record and then click the **Show Set Members** button to display the Set Member Summary list.

Navigating to the Set Membership List

From the contact record's **Add'l Personal** tab, the Set Membership section displays the sets that the contact is a member of.

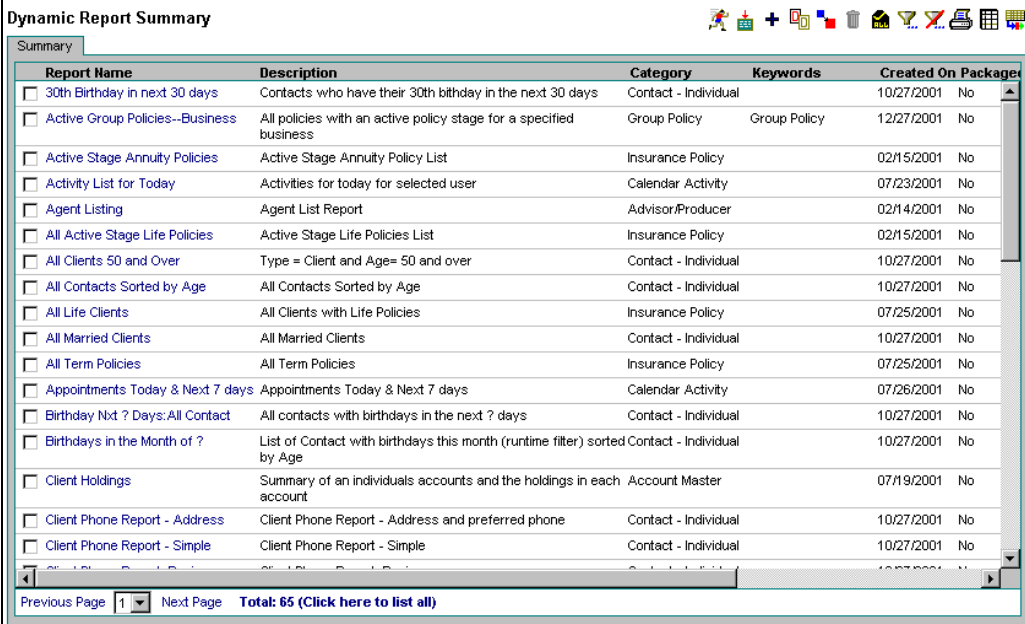
Navigating to the Individual Contact Summary List of Set Members

From the Set Summary list, tag a record and then click the **Go to Contact Summary** button to open the Individual Contact Summary list. Please note that SmartOffice will populate the Individual Contact Summary page with members one set at a time. If more than one set is selected, by default, the first one is considered.

Dynamic Reports

Navigating to the Dynamic Report Summary Spreadsheet

1. Click the **Marketing** menu item and then select **Dynamic Reports** from the expanded list to open the Search Dynamic Reports dialog box.
2. Click **Search** to display the Dynamic Report Summary spreadsheet.



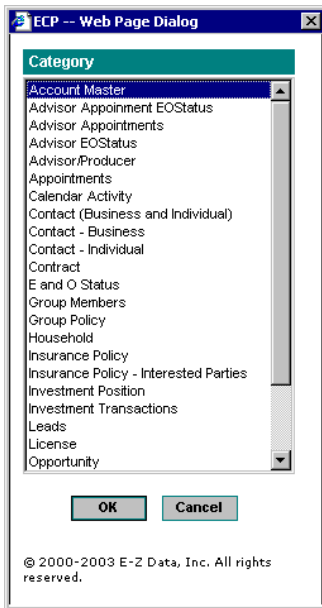
Report Name	Description	Category	Keywords	Created On	Package
<input type="checkbox"/> 30th Birthday in next 30 days	Contacts who have their 30th birthday in the next 30 days	Contact - Individual		10/27/2001	No
<input type="checkbox"/> Active Group Policies--Business	All policies with an active policy stage for a specified business	Group Policy	Group Policy	12/27/2001	No
<input type="checkbox"/> Active Stage Annuity Policies	Active Stage Annuity Policy List	Insurance Policy		02/15/2001	No
<input type="checkbox"/> Activity List for Today	Activities for today for selected user	Calendar Activity		07/23/2001	No
<input type="checkbox"/> Agent Listing	Agent List Report	Advisor/Producer		02/14/2001	No
<input type="checkbox"/> All Active Stage Life Policies	Active Stage Life Policies List	Insurance Policy		02/15/2001	No
<input type="checkbox"/> All Clients 50 and Over	Type = Client and Age= 50 and over	Contact - Individual		10/27/2001	No
<input type="checkbox"/> All Contacts Sorted by Age	All Contacts Sorted by Age	Contact - Individual		10/27/2001	No
<input type="checkbox"/> All Life Clients	All Clients with Life Policies	Insurance Policy		07/25/2001	No
<input type="checkbox"/> All Married Clients	All Married Clients	Contact - Individual		10/27/2001	No
<input type="checkbox"/> All Term Policies	All Term Policies	Insurance Policy		07/25/2001	No
<input type="checkbox"/> Appointments Today & Next 7 days	Appointments Today & Next 7 days	Calendar Activity		07/26/2001	No
<input type="checkbox"/> Birthday Nxt ? Days:All Contact	All contacts with birthdays in the next ? days	Contact - Individual		10/27/2001	No
<input type="checkbox"/> Birthdays in the Month of ?	List of Contact with birthdays this month (runtime filter) sorted by Age	Contact - Individual		10/27/2001	No
<input type="checkbox"/> Client Holdings	Summary of an individuals accounts and the holdings in each account	Account Master		07/19/2001	No
<input type="checkbox"/> Client Phone Report - Address	Client Phone Report - Address and preferred phone	Contact - Individual		10/27/2001	No
<input type="checkbox"/> Client Phone Report - Simple	Client Phone Report - Simple	Contact - Individual		10/27/2001	No

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- **Run Report:** Select a record and then click this button to generate the report.
- **Execute Packaged Options:** Select a record and then click this button to generate the report.
- **Add:** Click this button to add a new filter.
- **Copy:** Click this button to copy an existing filter.
- **Modify:** Select a report and then click this button to modify the report.
- **Delete Record(s):** Click this button to delete selected record(s).
- **Tag All:** Click this button to select all records.
- **Filter Records:** Click this button to filter the records.
- **Unfilter Records:** Click this button to clear an existing filter.
- **Print Spreadsheet:** Click this button to print the Filter Summary spreadsheet.
- **Customize Layout:** Click the Customize layout button to customize the details that will display in the spreadsheet. The user can select which columns to display, specify a width for each column, define sort order, set truncation, subtotal and total specified columns.
- **Spreadsheet Export:** Click this button to export the data in the spreadsheet to CSV, XML, or TAB Separated format. MS Word, MS Excel, Web Browsers and Notepad can be used to display the exported data.

Navigating to the Dynamic Report Category List

Without entering a category in the Search Dynamic Reports dialog, click **Add**; or, click the **Add** button from the Dynamic Report Summary spreadsheet to display the Category dialog box.



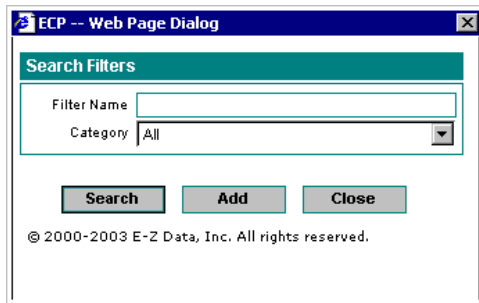
Navigating to the Dynamic Report Summary List

1. Click the **Marketing** menu item and then select **Dynamic Reports** to open the Search Dynamic Reports dialog box.
2. Click **Search** without entering any search criteria to display the Dynamic Report Summary list.

Components of Filters

Search Filters

In the side menu, click **Marketing** and then select **Filters** to open the Search Filters dialog box. The Search Filters dialog box is used to either search for existing filter(s) or add a new filter.



- **Filter Name:** The name of the filter to be located/added or leave it blank to list the filters by category.
- **Category:** Select the required category from the drop-down list. Select **All** from the list to display all filters.
Note: It is not mandatory to provide the filter name or category.
- **Search Button:** Click this button to search for filter(s). When no filter name or category is provided, clicking this button will summarize all filters.
- **Add Button:** Click the **Add** button to add a new filter.

Add New Filter

Filters are based on the filter category. The Filter Category dialog lists all available categories based on which a user can create a new filter.

To access the Category dialog box:

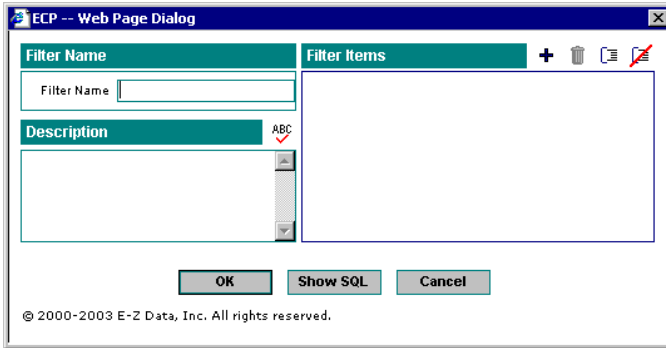
- Without specifying a category in the Search Filters dialog box, click **Add**.
- From the Filter Summary list, click **Add**.



Add New Filter Dialog Box

The Add New Filter dialog box is used to specify the details pertaining to the new filter and is accessed in the following ways:

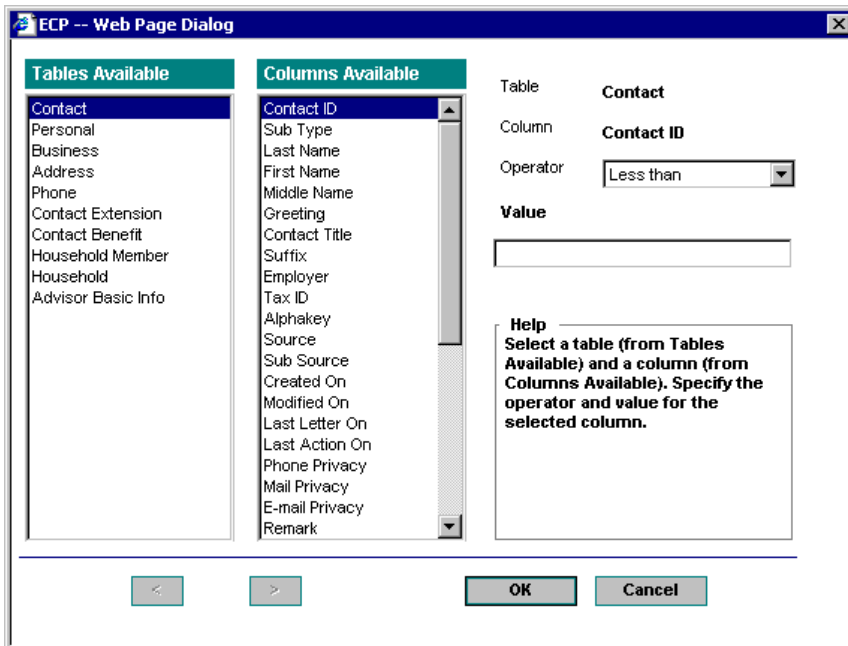
- Select the required category in the Search Filters dialog box and then click the **Add** button. The Filter Summary spreadsheet displays the specified records. Click **Add**.
- From the Filter Category dialog box, select the category from the drop-down list and then click **OK**.



- **Filter Name:** Specify the name of the new filter in this field.
- **Description:** Provide a description for the new filter.
- **Filter Items:** This section displays the list of columns and the corresponding applied filter. Click the **Add** button to add a filter setup for the new filter.
- **Show SQL:** Click this button to view the equivalent SQL generated for the filter.

Filter Setup Dialog Box

In the Add New Filter dialog box, click the **Add** button in the Filter Items section to open the Filter Setup dialog box.

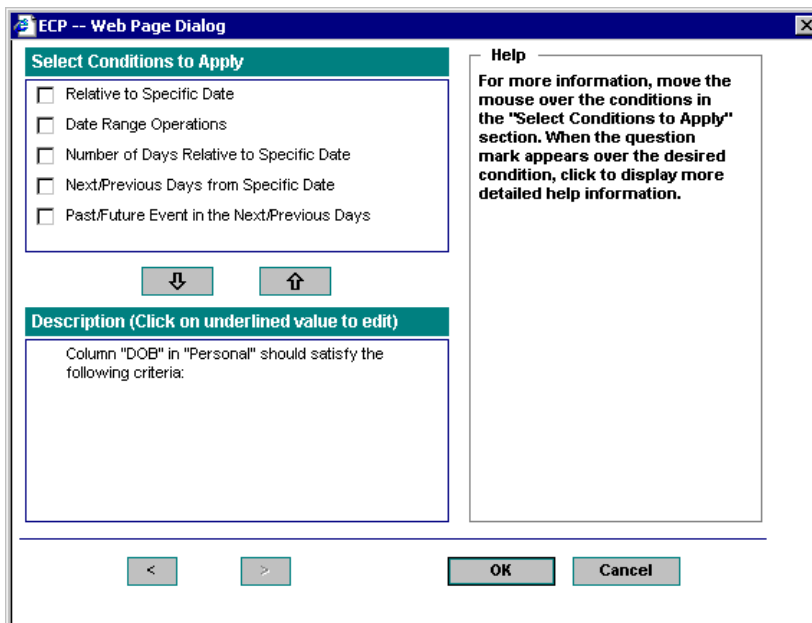


- **Tables Available:** This section lists all available tables that can be used to create a filter.
- **Columns Available:** This section lists all the columns available in the table that has been selected in the Tables Available section.
- **Table:** This field displays the name of the selected table.
- **Column:** This field displays the name of the selected column.
- **Operator:** The Operator list box lists all operators. This list depends on the field type of the column selected in the Columns Available section.
- **Value:** Specify a value for the selected column. For a particular field, if the operator selected is Less Than and the value specified is 10, all records in which the value of the selected field matches the condition “<10” are extracted.
- **Help:** This section provides brief instructions to create the filter setup.

Advanced Date Options Dialog Box

Use predefined options to simplify the task of specifying complex conditions for a date field while creating filters.

1. From the Filter Setup dialog box, specify the table and date-specific column information and then select **Advanced** from the Operators drop-down list.
2. From the Select Conditions to Apply dialog box, specify the condition and description information and then click **OK**.



- **Select Conditions to Apply:** This section displays a list of advanced date conditions that are used to create filters. Select the required condition and then click the Down Arrow button.
- **Description:** This section displays a list of selected criteria as hyperlinks. Click on any link to modify the values.
- **Help:** This section explains how to use the advanced date options.

Apply a Filter

The three ways of applying a filter:

- All modules in SmartOffice that make use of the available filters provide a link/field called **Filters** in their respective Search dialog boxes. The user can directly specify the name of the filter in this field, in which case the filter condition is applied to the records. The user can also click the field name link to open the Filter Summary dialog box.
- A filter can be attached to a set. Refer to the Sets section for more information.
- A filter can be attached to a dynamic report. Refer to the Dynamic Reports section for more information.

Filter Summary Dialog Box

The Filter Summary dialog box is used to select or create a filter record and displays all filters pertaining to a specific category.

To use filters to search for a group of contacts:

1. Select the **Contact** menu item and then select **Contact Search** from the expanded list to open the Search Contact dialog box.
2. Click the **Filter** hyperlink to open the Filter Summary dialog box.
3. Click the appropriate Filter hyperlink.

Copy an Existing Filter

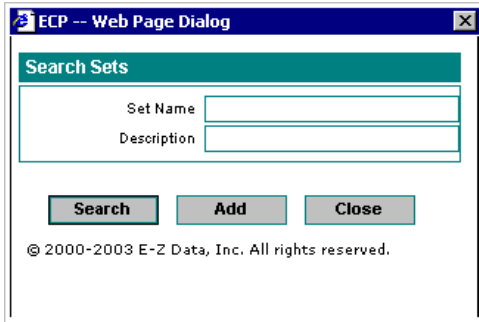
Instead of repeatedly modifying the same filter, a filter can be copied and then modified to serve a different purpose.

1. From the Filter Summary list, tag a record and then click the **Copy** button to open the Information of the New Filter dialog box.
2. Enter the name and description for the new filter and then click OK to save the filter to the Filter Summary list.
3. Click the appropriate Category hyperlink to specify additional filter criteria.

Components of Sets

Search Sets

Click the **Marketing** menu item and then select **Sets** from the expanded list to open the Search Sets dialog box. Using the Search Sets dialog box, a user can either search for existing sets or add a new set. Sets can be located based on the set name and/or the description.



Set Name: Enter the set name to be located or do not enter any search criteria to display the Set Summary list.

Description: Enter the Description. The first few characters of the description are sufficient to locate any set.

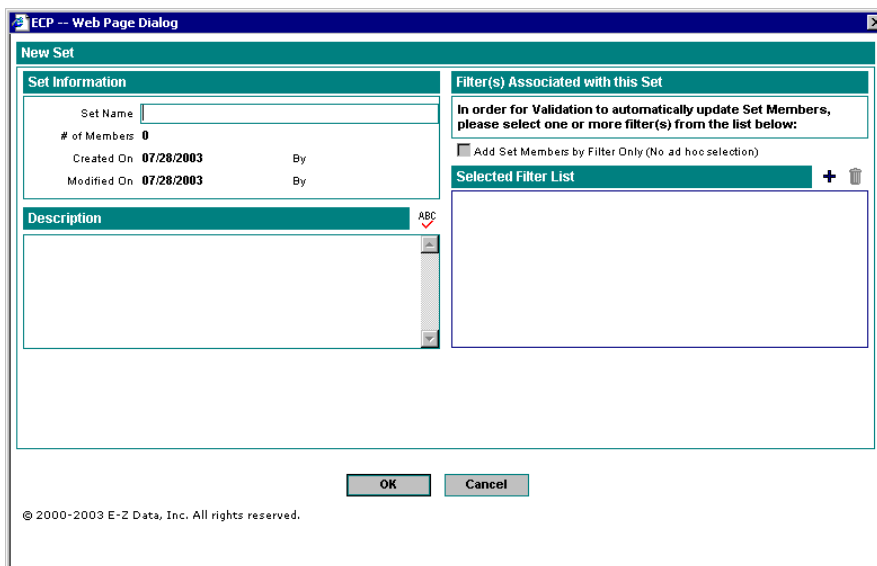
Search: Click this button to begin the search process. When no set name or description is provided, clicking this button will summarize all sets.

Add: Click the **Add** button to add a new set.

Add New Set

Adding a Set from the Search Sets Dialog Box:


1. From the Search Sets dialog box, click **Add** to open the New Set dialog box.
2. Enter the set information and then click **OK**.






- **Set Name:** Enter the set name.
- **# of Members:** Indicates the number of members in the set and is automatically generated.
- **Created On:** Indicates the creation date.
- **Created By:** Displays the name of the user who created the set.
- **Modified On:** Indicates the date on which the set was last modified.
- **Modified By:** Displays the name of the user who modified the set.
- **Description:** Enter a description for the set. The sets can be located based on this description.
- **Filter(s) Associated with this Set:** Select the **Add Set by Filter Only (No ad hoc selection)** option to create the set based upon filters only.
- **Selected Filter List:** Displays the list of filters used for creating the set. Use the **Add** button to add a filter.

Adding a Set from the Set Summary List:

1. From the Set Summary spreadsheet, click the **Add** button to open the New Set **Detail** tab.
2. Enter the set information and then click **Save**.

New Set 

Summary | Detail | Set Members

Set Information	Filter(s) Associated with this Set
Set Name <input type="text"/> # of Members 0 Created On 08/22/2003 By Modified On 08/22/2003 By	In order for Validation to automatically update Set Members, please select one or more filter(s) from the list below: <input type="checkbox"/> Add Set Members by Filter Only (No ad hoc selection)
Description  <input type="text"/>	Selected Filter List   <input type="text"/>

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Add Members to a Set from the Individual Contact Summary List

1. From the Individual Contact Summary list, tag the records to be added to the set.
2. Click the **Add to Set** button to open the Search Sets dialog box.
3. Enter the search criteria and then click **Search** to open the Set Summary dialog box.
4. Tag the set(s) for which the contacts are to be added and then click **OK**.

Add Contact Records to a Set from the Add'l Personal Tab

1. From the **Add'l Personal** tab, click the **Add** button in the Set Membership section to open the Search Sets dialog box.
2. Enter the name of the set and then click **Search** to open the Set Summary list.
3. Tag the set record(s) to which the contact will be added and then click **OK**.

Display Set Members

From the Set Summary list, tag a record and then click the **Set Members** tab.

Add Members to a Set

1. From the Set Summary list, tag the records to which members will be added.
2. Click the **Add New Members to Tagged Sets** button to open the Search Individual/Business Contacts dialog box.
3. Specify the search criteria and then click **Search** to open the Contact List dialog box.
4. Tag the contact(s) to be added to the set and then click **OK**.

Validate a Set

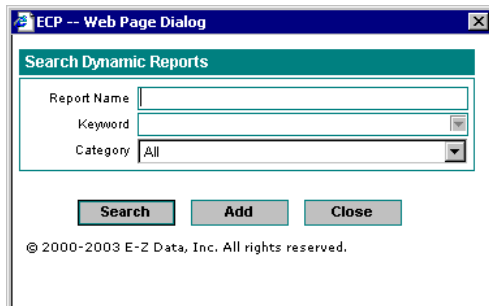
Validating a set is the process of updating the set with current data. It is an essential process when the set is created or maintained using filters. This process may result in the increase or decrease of set members.

- From the Set Summary list, tag one or more records and then click the **Validate Tagged Sets** button to begin the validation process.

Components of Dynamic Reports

Search Dynamic Reports

Click the **Marketing** menu item and then select **Dynamic Reports** from the expanded list to open the Search Dynamic Reports dialog box. This dialog box is used to either search for existing dynamic reports or add a new dynamic report.



Report Name: Enter the name of the report to be located/added.

Keyword: Records can be associated with keywords. Enter the keyword for the report to be located.

Category: Select the appropriate category from the drop-down list.

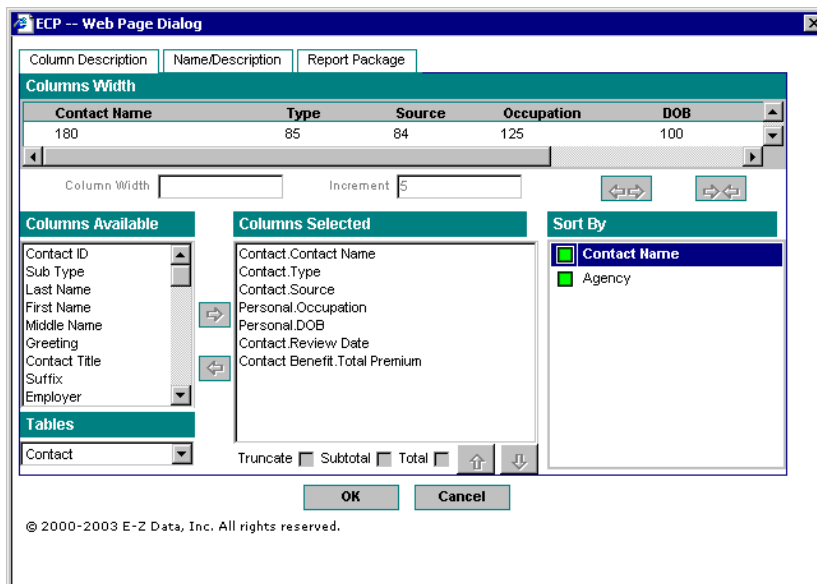
Search Button: Click this button to begin the search. Without entering any search criteria, click **Search** to display the Dynamic Report Summary list.

Add Button: Click the **Add** button to add a new report.

Add New Dynamic Report

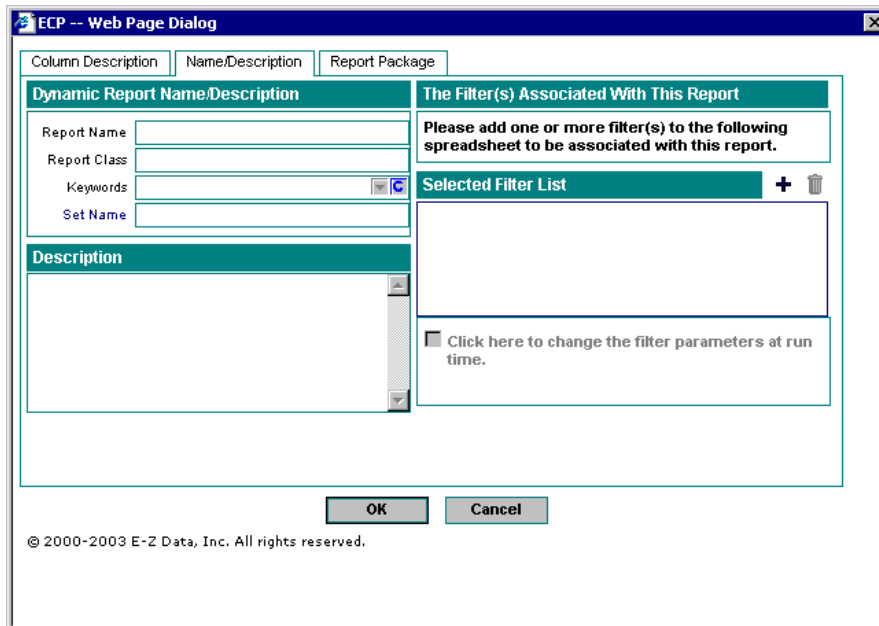
1. From the Dynamic Report Summary list, click the **Add** button to open the Category dialog box.
2. Select a report category and then click **OK** to open the Column Description dialog box.
3. Specify the column and sorting information and then click the **Name/Description** tab.
4. Enter the name, description, and filter information and then click the **Report Package** tab.
5. Enter the report package and activity information, if applicable, and then click **OK**.
Note: The **Report Package** tab is only available for the Advisor/Producer, Contact (Business and Individual), Contact – Business, Contact – Individual, and Recruitment Tracking reports.

Using the Column Description Tab



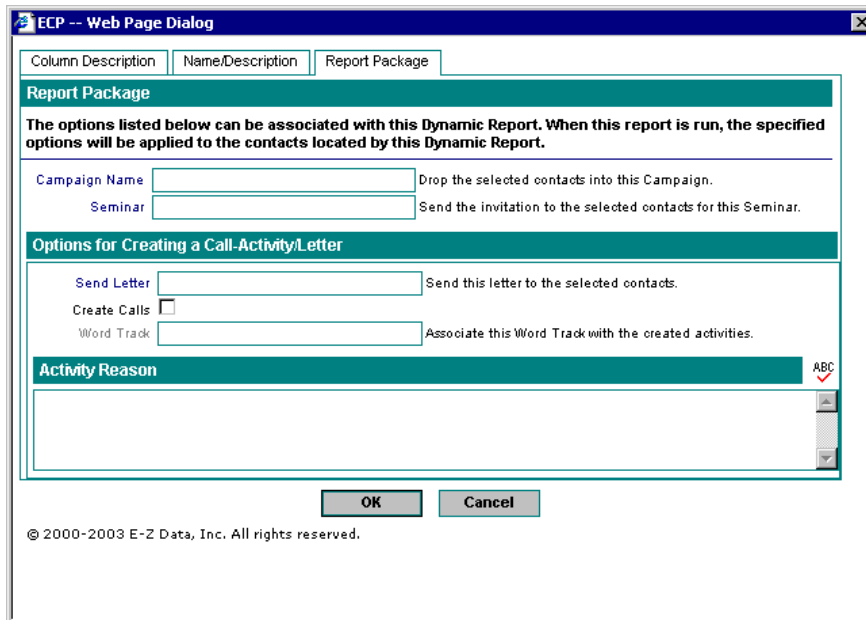
- **Columns Width:** This section displays the different columns and their widths. To change the width of any column, select the column and then specify the width in the Column Width field. The Increment field can also be used to alter width. Click the arrow buttons to increase or decrease the width of a column.
- **Columns Available:** This section lists all of the columns available in the table specified in the Tables field. Select an available column and then click the **Right-Arrow** button to add it to the Columns Selected list.
- **Tables:** Use the drop-down list to select the tables whose columns will be added to the dynamic report.
- **Columns Selected:** Columns selected for the dynamic report are shown in the Columns Selected list box. Select a column and click the **Left-Arrow** button to return a column to the available list. Click the **Up Arrow** and **Down Arrow** buttons to designate the column order.
- **Truncate:** Select a column and then select this option to truncate the column.
- **Subtotal:** Select a column and then select this option to include a subtotal in the report.
- **Total:** Select a column and then select this option to include the total in the report.
- **Sort By:** Define the sort order for the report by selecting the appropriate Sort By option.

Using the Name/Description Tab



- **Report Name:** Enter the name of the report.
- **Report Class:** Enter the report class, if applicable.
- **Keywords:** Either enter a keyword, or, select a keyword from the corresponding drop-down list.
- **Set Name:** Click the **Set Name** hyperlink to open the Search Sets dialog box and specify the set name.
- **Description:** Enter a description of the report.
- **Selected Filter List:** This section lists all filters associated with the dynamic report. Click the **Add** button to add a filter to the report definition. If more than one filter is added, the filters are linked using the AND or OR operator. If the AND operator is used, only the records satisfying the criteria in all of the filters are added to the report. When the OR operator is used, records that satisfy the criteria of one or multiple filters are added to the report. Click the operator to change its value.
- **Click here to change the filter parameters at run time:** Select this option to modify the filter parameters during the generation of the report.

Using the Report Package Tab



- **Campaign Name:** Click the Campaign Name hyperlink to open the Search Campaign dialog box in order to enter the selected contacts into the campaign.
- **Seminar:** Click the **Seminar** hyperlink to open the Seminar List dialog box in order to send the invitation to the selected contacts for this seminar.
- **Send Letter:** Click the **Send Letter** hyperlink to open the Search Form Letters dialog box in order to send a letter to the specified contacts.
- **Create Calls:** Select this option to create a call activity.
- **Word Track:** Click the Word Track hyperlink to select a word track to be associated with the call activity.
- **Activity Reason:** Enter a reason for the call activity.

Generate a Dynamic Report

From the Dynamic Report Summary list, tag a record and then click the **Run Report** button to generate the report.

Generate a Report Package

- From the Dynamic Report Summary list, select a record and then click the **Execute Packaged Options** button.
- From the Dynamic Report Summary list, tag a record and then click the **Run Report** button to generate the report. From the report spreadsheet, click the **Execute Packaged Options** button.

Link Contacts to Marketing Options

1. From the generated report spreadsheet, tag the applicable records and then click the **Marketing Options** button to open the Marketing Options dialog box.
2. Select the appropriate option and then click **OK** to open the corresponding dialog box.
3. Click the applicable hyperlink to link the contacts to the marketing option.

Copy a Dynamic Report

Instead of repeatedly modifying the same report, a report can be copied and then modified to serve a different purpose.

1. From the Dynamic Report Summary list, tag a record and then click the **Copy** button to open the New Dynamic Report Information dialog box.
2. Enter the New Report Name and New Report Description and then click **OK** to save the report.