

# Fast•Class File

Client Data System

Dynamic Report Download

## Building Filters for the Half

One way of searching for contacts that will reach a specific age in the next six months is with a dynamic report using a filter with two sets of criteria that will identify all contacts of a specific age with a birthday in the next six months.

## Loading Files into CDS:

- From the main screen in CDS, select **Database** in the menu bar and then select **Utilities**.
- In the **Utilities** menu, select **Load Data**.

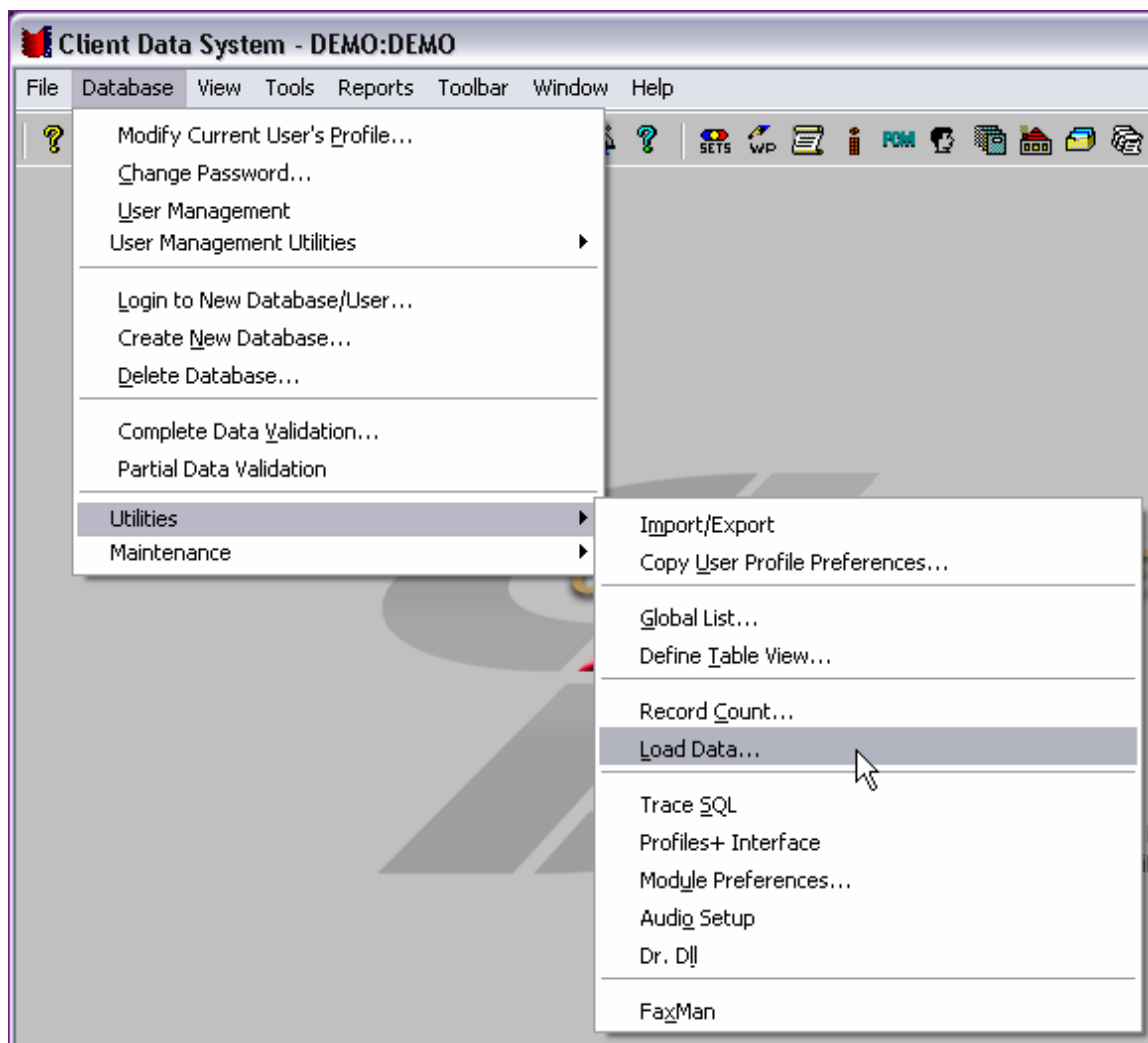
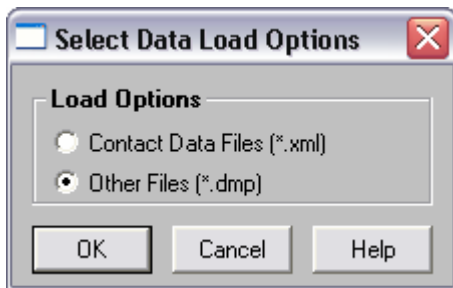


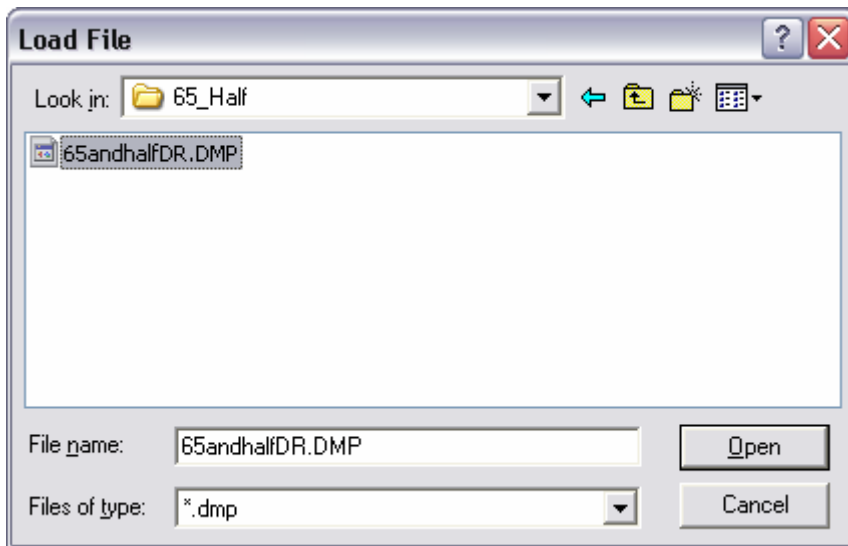
Figure 1: The Utilities menu (Load Data option selected).

- Select the **Other Files (\*.dmp)** option in the **Select Data Load Options** window.



**Figure 2: The Select Data Load Options window.**

- Click **OK**.
- When the **Load File** window opens, use the **Look in** drop-down field to locate the **65\_Half** folder.



**Figure 3: The contents of the 65\_Half folder viewed from the Load File window.**

- Select the **LifeandhalfDR.DMP** file and click **OK**. The **All Contacts turning 65 in the next 6 months** dynamic report with filter will be loaded into CDS.

## Using the All Contacts turning 65 in the next 6 months Dynamic Report:

- Select **Reports** from the main screen of CDS.
- In the **Reports** menu, select **Dynamic Reports**.
- In the **Description** search field, type **All Contacts turning 65 in the next 6 months** and click **OK**.
- A summary screen will open with the **All Contacts turning 65 in the next 6 months** dynamic report on display.
- To modify the dynamic report or view the filter criteria of the attached filters – select the **All Contacts turning 65 in the next 6 months** dynamic report and click the **Modify Record** button.

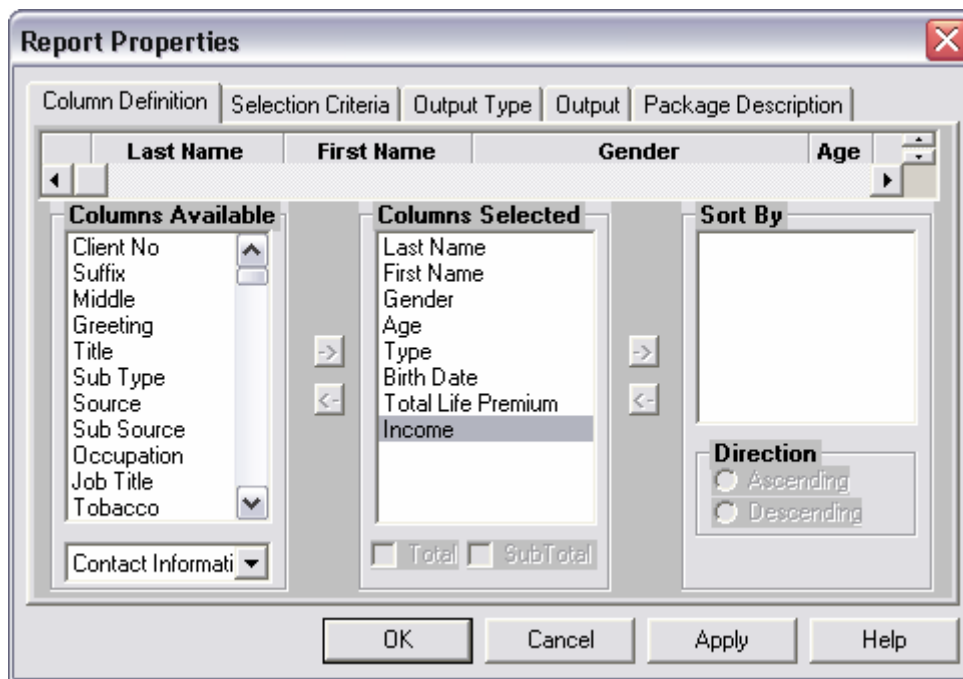


Figure 4: The Report Properties window of the All Contacts turning 65 in the next 6 months dynamic report.

- To run the **All Contacts turning 65 in the next 6 months** dynamic report, double-click the report or select the report and click the **Run** button.



Figure 5: The Run button in the Report Selection Summary screen.