

# Fast-Class File

Client Data System

## Volume 127: Contact Reports

### To generate a contact report for an individual contact:

- Bring the contact into focus using the **Contact Search** tool.
- From the contact record screen, select **Reports** from the main menu.
- From the **Reports** menu, select **Contact Reports**.
- In the **Contact Reports** menu, select the **Contact Detail Report** or the **Contact Phone List Report**.

The **Contact Detail Report** is a listing of important contact information stored in CDS such as name, phone numbers, addresses, e-mail address, policy benefit information, investment position information, key relationships, dependents, and recent activities.

The **Contact Phone List Report** is a comprehensive listing of all phone numbers entered for a selected contact(s) in CDS.



**Fig 1: Select Contact Options window**

- Select the desired report with a left-click.
- In the **Select Contact Options** window, select **Current Contact Only**.
- Click **OK**.

CDS will launch a print preview of the report. After reviewing the print preview, print the report by clicking on the **Print** button in the toolbar.

The report can also be exported in a number of different file formats.

### To export the report:

- Click the **Export** button.
- Select the desired export file format using the **Format** drop-down.
- Select the destination of the export using the **Destination** drop-down.
- After selecting the format and destination of the export, click **OK**.

**To generate a contact report for multiple contacts:**

- From an open contact record, select **Reports** from the main menu.
- From the **Reports** menu, select **Contact Reports**.
- In the **Contact Reports** menu, select the desired contact report: **Contact Detail Report** or **Contact Phone List Report**.
- In the **Select Contact Options** window, select the **Select Contact by Filter/Sets** option.
- In the **Filter Selection – Contact Information** window, use a filter or set to select contacts for whom the contact report will be generated.

**To create a report using a filter:**

- Click on the arrow in the active **Filter** drop-down field.
- Scroll through the list until the desired filter is displayed.
- To create a new filter, leave the **Filter** drop-down field blank and click on the box to the right of the **Filter** drop-down field.

**To create a report using the members of a set:**

- Click on the arrow in the **Set** drop-down field.
- Scroll through the list of sets until the desired set is selected.
- To create a new set, leave the **Set** drop-down field blank and click on the box to the right of the **Set** drop-down field.
- After selecting the desired set or filter, click **OK**.
- CDS will launch a print preview of the report. After reviewing the print preview, print the report by clicking on the **Print** button or export the report by using the **Export** button in the toolbar.