This Fast Class demonstrates one way of creating a dynamic report that will calculate fees for time spent working with a client based on an hourly rate. The hourly rate and time data is captured in the Time Log Information window when making a Time Log entry in a contact record SmartPad.

Figure 1: The Time Log Information window.

To create the Time Log Based Fee Report:
  • From the main screen in CDS, select Reports in the Main Menu.
  • Select Dynamic Reports.
  • Leave the search fields blank in the Find Report Selection window and click OK.
  • In the Report Selection summary screen, click the Add button.
  • Select the Contact Information table in the Select Primary Table window of the Report Definition Wizard and click Next.
  • Select the First Name and Last Name columns in the Report Column Definition window.
  • Select the Time Log Information table in the Table drop-down field under the Columns Available section.
  • Select the Date, Remarks, Duration, Hourly Rate, and Total Amount columns in the Report Column Definition window.
  • Adjust the width of selected columns as needed.

Note: Due to the fact that the Time Log Based Fee Report is built on two tables, column width cannot be adjusted in report results.
• Select the Duration column in the Columns Selected section and select the Total option.
• Select the Total Amount column in the Columns Selected section and select the Total option.
• Select the Date column in the Columns Selected section and click the arrow button pointing to the Sort By section.
• Click Next.
• In the Report Selection Criteria window (step 2), click the small button to the right of the first Filter drop-down field.
• In the Filter summary screen, click the Add button.
• Select the Time Log Information table in the Table Names window and click OK.
• In the Filter Time Log Information window, select the following criteria –
  o Column Name = Contact
  o Operation = Cur. Record

Note: When the Current Record operation is selected, the Value field disappears as the value is determined by the current selected record.
• Click the Add button to add selected criteria to the filter.
Click **OK**.
- Enter **Current Contact** as the name of the new filter.
- The new filter will appear in the **Filter Summary** screen.
- With the **Current Contact** filter selected, click the **OK** button (green checkmark) in the **Filter** summary toolbar.
- The **Current Contact** filter will be added to the **Report Selection Criteria** screen in the first **Filter** drop-down field.
- Click **Next**.
- Click **Next** to accept the default selections in step 3.
- Click **Next** to accept the default selections in step 4.
- Enter **Time Log Fee Report for Selected Contact** as the name of the dynamic report in step 5.
- Click **Finish** to create the **Time Log Fee Report for Selected Contact** dynamic report.

**To run the Time Log Fee Report for Selected Contact dynamic report:**
- Open a contact record.
- Select **Reports** in the main menu.
- Select **Dynamic Reports**.
- Tag the **Time Log Fee Report for Selected Contact** dynamic report and click the **Run** button.