This Fast Class demonstrates one way of creating a dynamic report that will display all primary contacts for Business contacts captured in CDS. This report will also include a filter that will identify all Business contacts with 10 employees or less.

To build a filter that will identify Business contacts with 10 employees or less –

- From the main screen in CDS, select View in the Main Menu.
- Select Filters.
- Leave the search fields blank in the Find Filter window and click OK.
- In the Filter summary screen, click the Add button.
- Select the Business table in the Table Names window and click OK.
- With the Filter on Business window open, select the following criteria –
  - Column Name = Emp.
  - Value = 11
  - Operation = Less Than
- After selecting criteria click Add.

Figure 1: The Filter on Business window (criteria added).

- With criteria entered in the Filter Criteria section of the Filter on Business window, click OK.
- Name the filter Employees < 11 and click OK. Add a description if needed.
- The new filter will be added to the Filter summary screen.
To build a dynamic report that will identify the primary contact of Business records captured in CDS and incorporate the **Employees < 11** filter that will find all businesses with 10 employees or less –

- 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 **Business** table in the **Select Primary Table** window of the **Report Definition Wizard** and click **Next**.
- Select the **Bus. Name, Contact, and Emp.** columns in the **Report Column Definition** window. Other columns may be added as needed.

![Figure 2: The Report Column Definition window (columns defined).](image)

- When column definition is complete, click **Next**.
- Add the **Employees < 11** filter. Add any other filters as needed.
- Click **Next**.
- Accept the default settings in the **Select Output Type** window and click **Next**.
- Accept the default settings in the **Spreadsheet Output Settings** window and click **Next**.
- Name the report **Business Contact Report – Employees 10 or less**. Add a description if needed.
- Select the **Run Time Filter** option to adjust filter parameters or change filters at run time.
- Click **Finish** to create the report.
- The **Business Contact Report – Employees 10 or less** report will appear in the **Report Selection** summary.
To run the Business Contact Report – Employees 10 or less dynamic report –

- Select the Business Contact Report – Employees 10 or less in the Report Selection summary.
- Click the Run button in the Report Selection summary toolbar.

![Business Contact Report](image)

Figure 3: Results of the Business Contact Report – Employees 10 or less dynamic report.