

Fast•Class File

Client Data System

Volume 58: Dynamic Report Download

Downloading Dynamic Reports:

- From the Dynamic Report Download page, select the dynamic report and click the download link.

Life Settlement Prospects
Identify potentially ideal life settlement prospects meeting the following criteria: Contacts 65 years old or older with an inforce life policy with a face value of \$250,000 or greater. Sample Life Settlement Prospect letters included in E-Z Editor and Word formats.

[Download Life Settlements.zip >>](#)

[View the Life Settlement Prospects Fast Class >>](#)

Figure 1: Dynamic Report selection on the Dynamic Report Download page - <http://www.ez-data.com/support/cdsdrdown.shtml> (Download Life_Settlement.zip >> highlighted).

Note: The download link will also include the name of the dynamic report and the .zip file extension.

- When the **File Download** window opens, click the **Save** button.

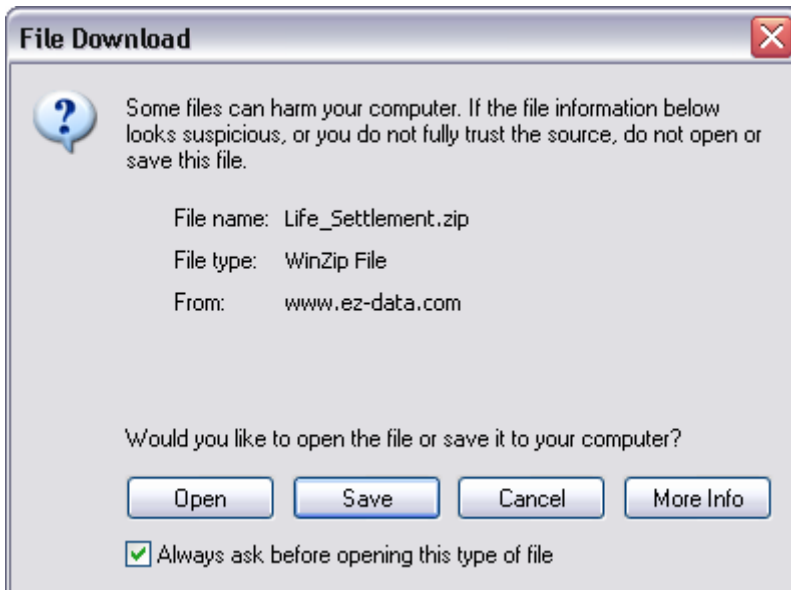


Figure 2: The File Download window.

- When the **Save As** window opens, use the **Save in** drop-down to select a location on your computer to store the .zip file.
- Click **Save**.

- The .zip file contains a folder with .dmp files that can be loaded into CDS. Extract the folder from the .zip file
Note: An unzipping utility is necessary to extract files. Microsoft Windows XP has a built in unzipping utility and Windows 2000 users can download WinZip from the CDS Training and Support Center.
- Follow the instructions included in the .zip file to add files to CDS.

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**.

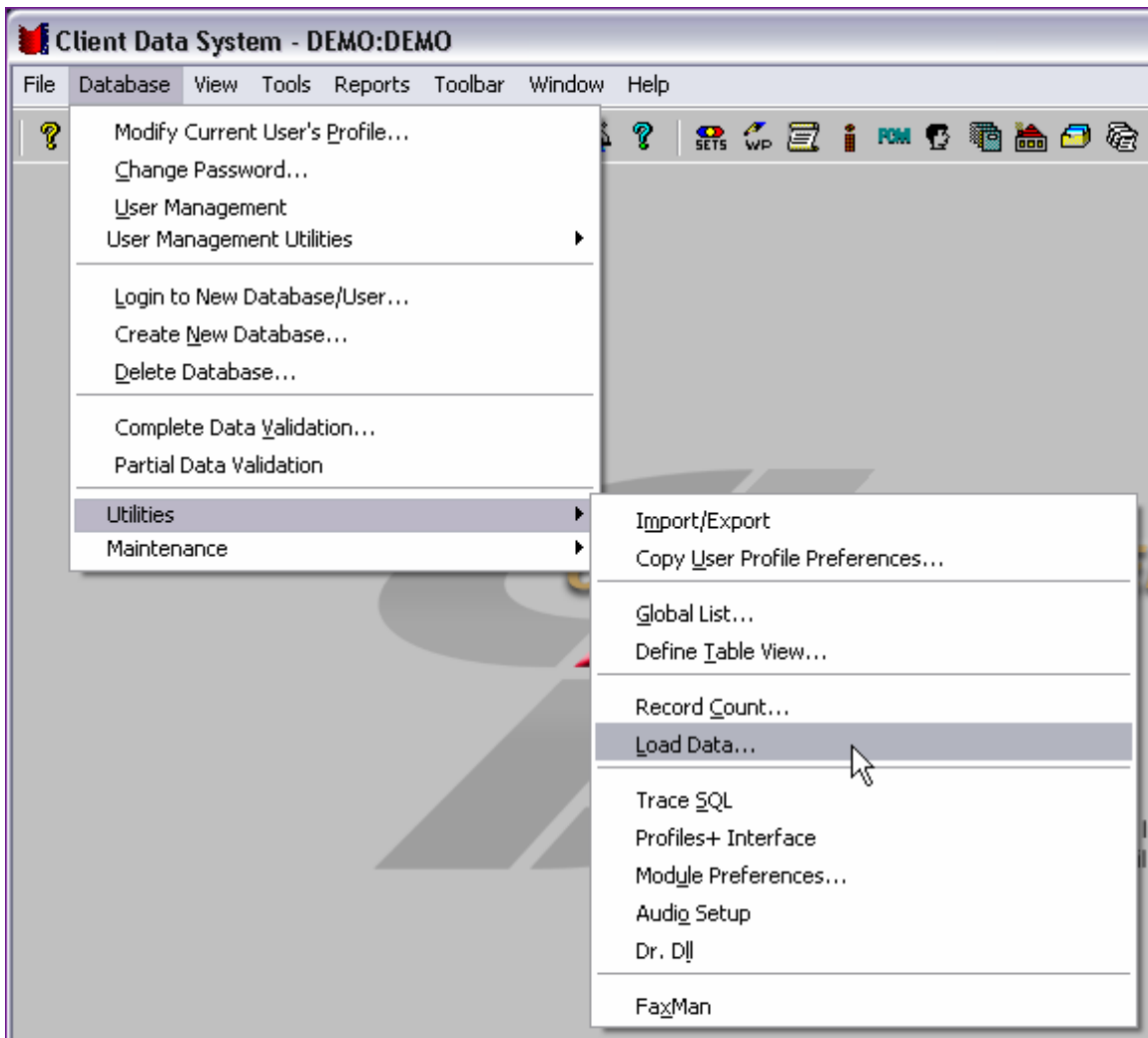


Figure 3: The Utilities menu (Load Data option selected).

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



Figure 4: The Select Data Load Options window.

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

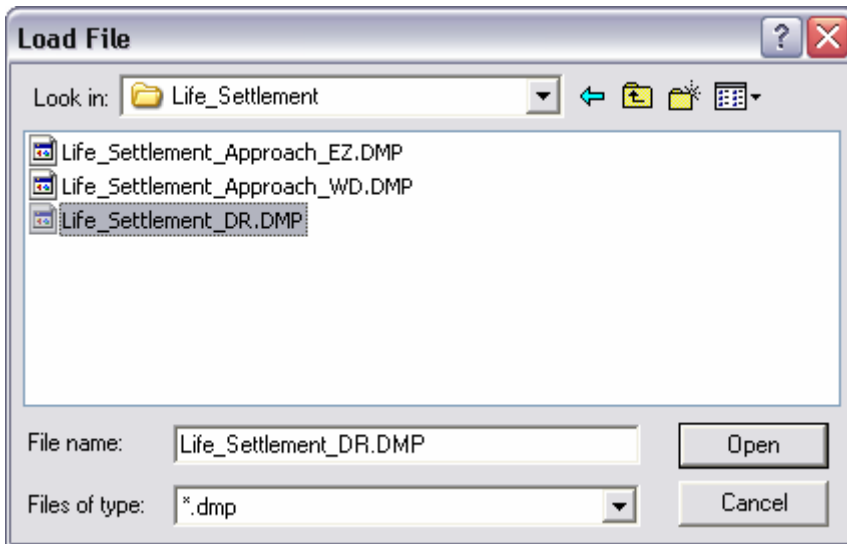


Figure 5: The contents of the Life_Settlement folder viewed from the Load File window.

- In above example, the **Life_Settlement** folder contains three .DMP files:
- The **Life_Settlement_DR.DMP** containing the Life Settlement Prospects dynamic report with included filters.
 - The **Life_Settlement_Approach_WD.DMP** file with the Life Settlement Prospect Approach letter in Microsoft Word format.
 - The **Life_Settlement_Approach_EZ.DMP** file with the Life Settlement Prospect Approach letter in E-Z Editor format.
- Select the dynamic report file as indicated in the included instructions and click **OK**. The dynamic report with filters will be loaded into CDS.
 - Using the same process (Starting from the main screen of CDS, select **Database > Utilities > Data Load...**), load one of the included approach letters (where available).
 - Follow the included instructions for using and making modifications to the dynamic report and sample form letters.