

Fast Class File

Client Data System

Volume 87: Dynamic Report Overview - Building a Dynamic Report

This Fast Class File continues the three part series covering Dynamic Reports in CDS. Dynamic Reports are flexible data mining tools that allow you to pull together information captured in CDS based on your criteria. Dynamic Reports also allow you to put information to work by adding contact records to a set, creating activities, or generating correspondence.

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Figure 1: Retirement Seminar Prospects Dynamic Report from Fast Class v87.

Dynamic Reports can be used to combine data from different categories in CDS. **It's important to mention that E-Z Data recommends using only one table when possible but when you need to use data from more than one table, begin with the contact table and build from there.**

For instance, you could build a dynamic report that would combine contact data and policy data. Many tables, such as the Policy, Investment, and Activity table, include some contact information so in many cases, you can build effective dynamic reports using just one table. As noted in part one of the Dynamic Report overview, the DEMO database is a useful resource for building and testing your dynamic reports. Please feel

free to log in to the demo database and work with the dynamic reports to become familiar with the different columns and tables available

Creating a Dynamic Report

- Click on **Reports** in the main menu bar.
- Click on **Dynamic Reports** in the **Reports** menu.
- Leave the **Description Field** blank to perform an open search and click **OK**.
- Click the **Add** button in the **Report Selection** summary toolbar.
- From the **Report Definition Wizard**, select the **Primary Table**.



Figure 2: Table Selection screen in the Report Definition Wizard.

Important Note: You should always begin from the **Contact Information** table if you're building a **Dynamic Report** around **contact data**. Also, **Dynamic Reports** should be limited to **two tables**.

- After selecting the Primary Table, click **Next**.
- The **Report Column Definition** step will open.

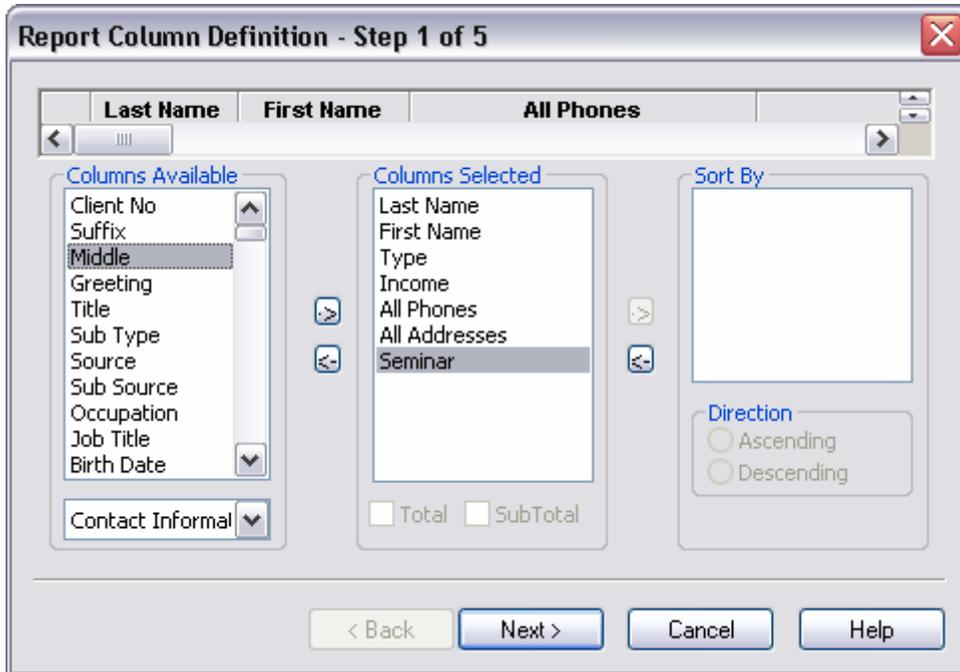


Figure 3: Report Column Definition window.

- Use the **Columns Available** section to define columns. To add columns from a different table, click the **drop-down** below the **Columns Available** section.
- Double-click the column or click on the **Right Arrow** button to move the column into the **Columns Selected** section. *Note: You can adjust the order of the columns by dragging and dropping the columns in the Columns Selected section.*
- After selecting the columns, click **Next**.
- Add filters to the dynamic report **Report Selection Criteria** step.

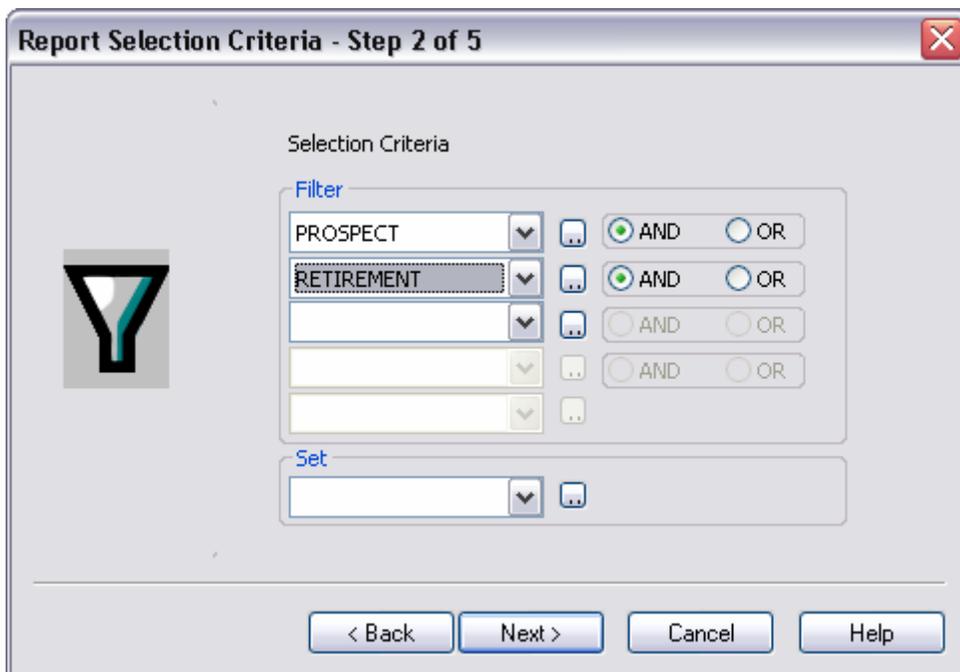


Figure 4: Report Selection Criteria window.

- To add filters to your Dynamic Report, click on the first **drop-down** field.
- Select a filter with a left-click.
- Use the remaining **Filter** drop-down fields to add more filters. If multiple filters are used, define the link operation with the **And** and **Or** options.
- After selecting the filters, click **Next**.
- Select a **Standard Spreadsheet** output or a **MS Word Output** and click **Next**.
- From the **Report Output** tab, select the output settings to define the appearance of the Dynamic Report and click **Next**.
- From the **Report Package Description** tab, give the Dynamic Report a name and click **Finish**.

Figure 5: Report Selection Criteria window.

- The new Dynamic Report will be added to the **Report Selection** summary list.
- To run the new Dynamic Report, tag the report and click the **Run** button in the toolbar.