Adding Contacts from the Results of a Dynamic Report to a Set
A Set is a group of contact records that is more or less static. A Set is a useful tool that you can use to group contacts together that you reference on a regular basis.

To add a list of Contacts to a Set using 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.
  Note: You could also type the name of the Dynamic Report into the Description Field.
• Tag the Dynamic Report you wish to use and click on the Run button.
• Click the Tag All button to select all contacts displayed.
• Click on the Sets button.
• Leave the Description Field blank to perform an open search and click OK.
  Note: You could also type the name of the Set into the Description Field.
• Tag the Set you wish to add your contacts into and click the Green Checkmark or OK button. CDS will add your contacts to the selected Set.

To view the Set Membership of the Set created above:
• Close the open Dynamic Report.
• Click on the Sets button.
• Leave the Description Field blank to perform an open search and click OK.
• Double-click on the Set.

To use Dynamic Report data to generate Correspondence:
• From an open list of contacts in a Dynamic Report, tag the contacts you wish to send correspondence.
• Click on the Spreadsheet Correspondence button in the toolbar.
• Select the Type of correspondence and click OK.
• Click on Yes to confirm the selection.
• Leave the Description Field blank to perform an open search and click OK.
• Select the Form Letter.
• Define your Printing Options.
• Click Print to generate correspondence.

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To Create Activities for Contact Records in a Dynamic Report:

- From an open list of contacts in a **Dynamic Report**, tag the contacts you wish to create activities for.
- Click the **Activities** button in the toolbar.
- Click on **Yes** to confirm the selection.
- Select the **Users** the activities will be assigned to in the **Mass Activity Creation** window.

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Figure 2: Mass Activity Creation window.

- Define the **Activity Type** and **Activity Sub-Type**.
  
  Note: By default, the Mass Activity Creation window is set to create a series of timed activities.

- To create a series of untimed **To Do** activities, tag the **Add as ToDo Activity** option.

- In the **Group Size** field, define the number of activities to be scheduled per day.

- In the **Every Day** field, define the number of days between scheduled activities.
  
  Note: You can also use the Mass Activity Creation screen to add the selected contacts to a set.

- Enter activity information in the **Subject** and **Reason** fields and click **OK**.