Downloading Dynamic Reports:

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

LTC Prospecting

Identify LTC prospects meeting the following criteria: Contacts between the ages of 40-55 with an income greater than $50,000 holding some form of life insurance but no LTC coverage. Sample LTC Prospect Approach letters included in both E-Z Editor and Microsoft Word format.

Download LTC_Pros.zip >>

View the Long Term Care Prospects Fast Class >>

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

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

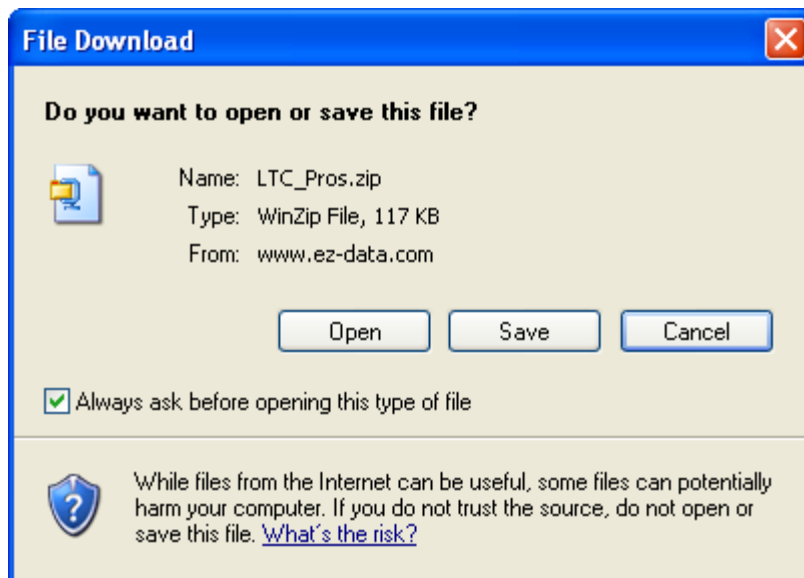• When the **File Download** window opens, click the **Save** button.

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**.
• Select the **Other Files (*.dmp)** option in 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.
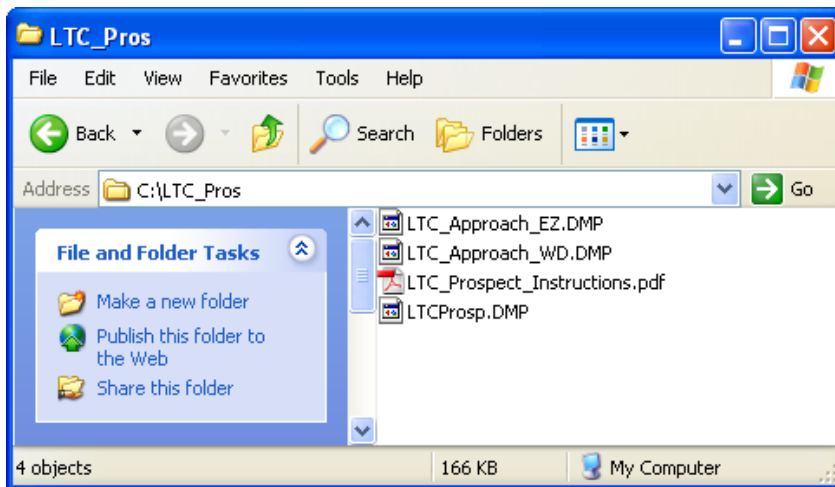

Figure 3: The contents of the LTC_Pros folder viewed from the Load File window.

In above example, the **LTC_Pros** folder contains three .DMP files:

o The **LTCProsp.DMP** containing the LTC Prospects dynamic report with included filters.
o The **LTC_Approach_WD.DMP** file with the LTC Prospect Approach letter in Microsoft Word format.
o The **LTC _Approach_EZ.DMP** file with the LTC 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** > **Load Data**…), 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.