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 list 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 –
  o Column Name = Emp.
  o Value = 11
  o 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 list 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.