

# Fast Class File

Client Data System

## Startup Module Options

CDS 6 gives you the ability to select a module to launch automatically when you login. Startup Module options include the three Calendar views, policy, investment, and pending case management.

### Selecting a Startup Module:

- Select **Database** in the main menu bar.
- In the **Database** menu, select **Modify Current User's Profile**.
- In the **User Profile**, select the **Miscellaneous Information** tab.

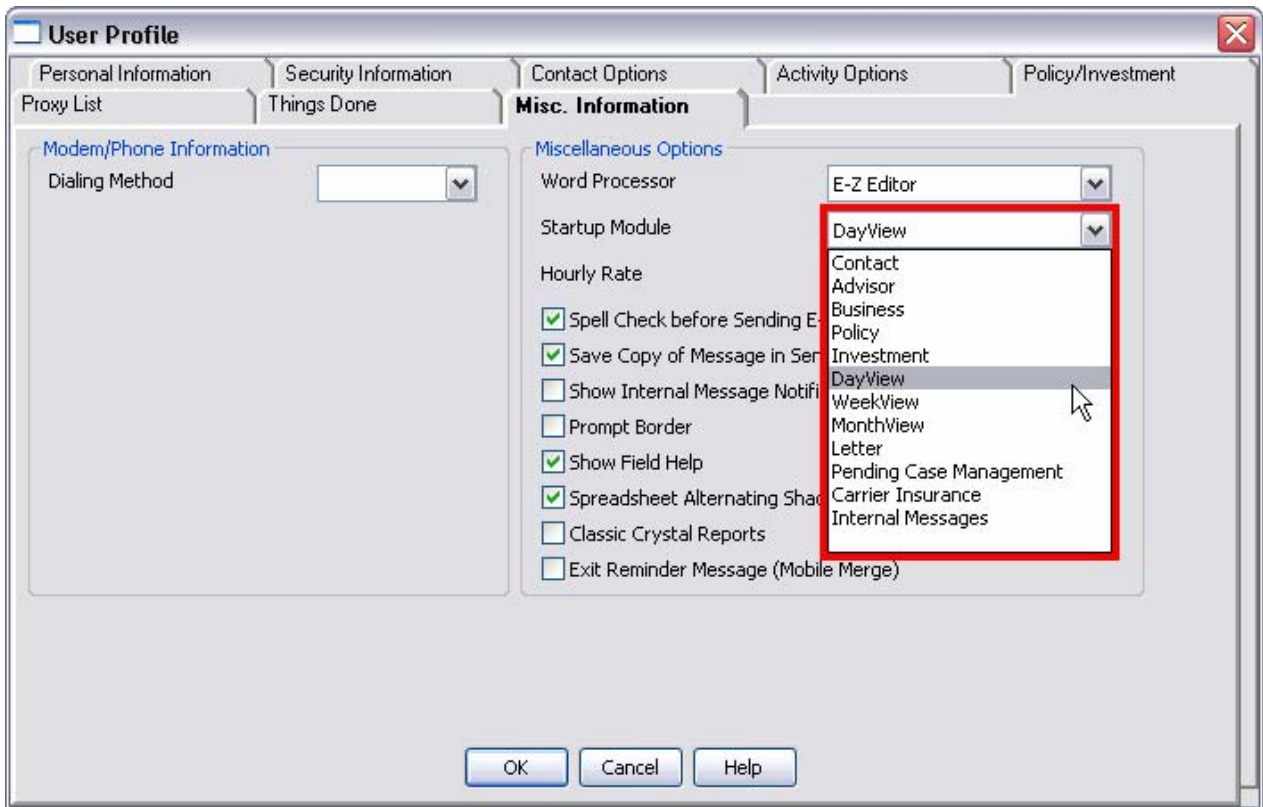


Figure 1: The Startup Module drop-down in the User Profile.

- Select the **Startup Module** drop-down and select the startup module.

Selecting one of the calendar views gives you the ability to review your appointments and action items immediately when you log in to CDS. Selecting the contact, policy, investment, or pending case management module, you will be prompted to search for a record in the selected module when you login. If you select the Internal Messages module, the Internal Message Center will launch at startup.

Note: If you make any changes to the **User Profile**, including a change to the **Startup Module** option, you will need to log out of CDS for the changes to take effect.

## The Unfinished Activity Summary:

In previous versions of CDS, unfinished timed activities would be automatically turned into to-do items that would be advanced in the CDS calendar by the Automove Feature. All unfinished timed activities are now automatically added to the **Unfinished Activity Summary**.

To have the unfinished Activity Summary display at login:

- Select **Database** in the main menu bar.
- In the **Database** menu, select **Modify Current User's Profile**.
- Select the **Activity Options** in the **User Profile**.
- Then select the **Show Unfinished Activities on Startup** option in the **General Information** section.

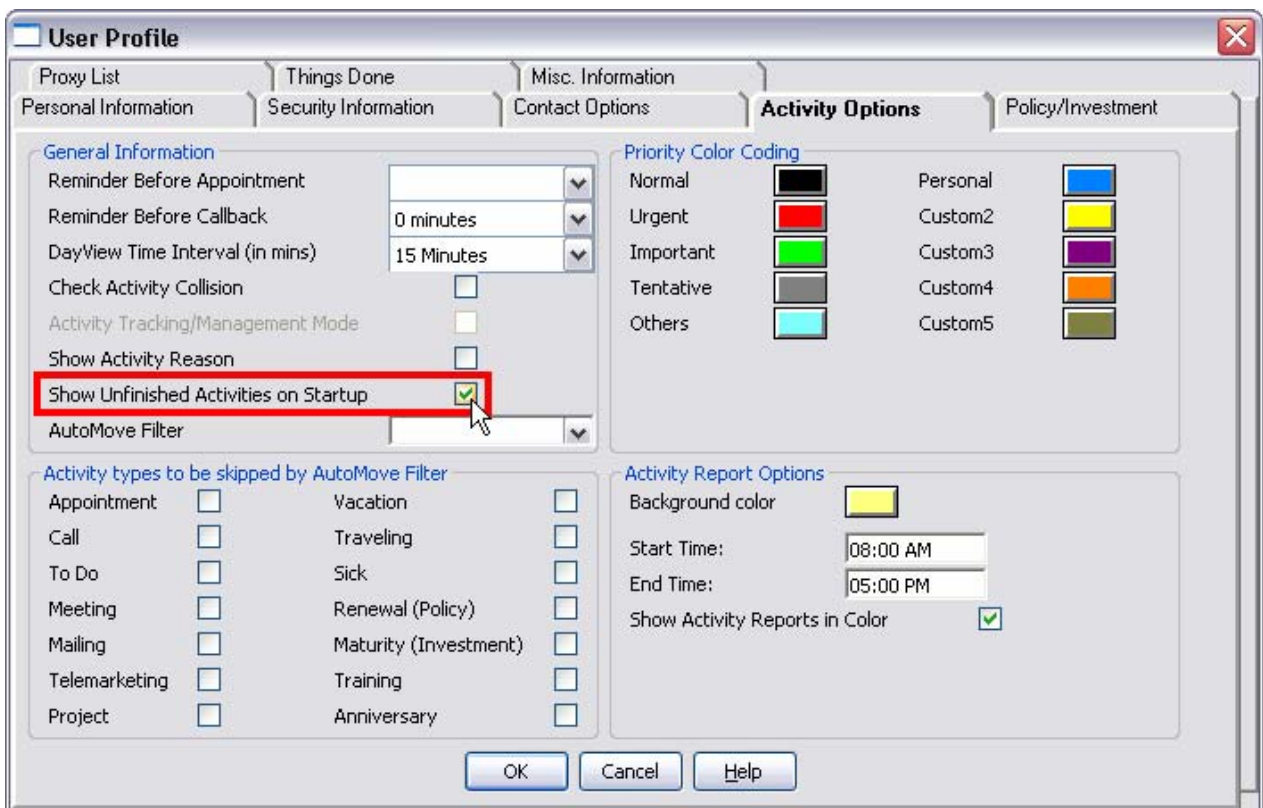


Figure 2: The Unfinished Activities option in the User Profile.

Selecting the option to view the **Unfinished Activity Summary** on startup will not pre-empt startup module selections on the **Miscellaneous Information** tab. For instance, if you select the option to display unfinished activities at startup and the option to display the DayView at startup, both will be displayed when you log in to CDS.