In the Custom Fields Fast Class, customizations were made to the first alphanumeric field (AlphaNum1) on the Custom tab. AlphaNum1 was renamed Seminar and drop down choices were added for each seminar offered: Financial Planning, College Prep, and Retirement. With the custom field defined and data entered for contacts who have attended one of the seminars, a Dynamic Report can be run to see which contacts have attended a particular seminar. For the example in the Advanced Fast Class, a Dynamic Report was run for all the contacts who attended the College Prep Seminar.

Before running the dynamic report, a filter must be built to find specific data entered in the Seminar field. To build a filter, click on the View menu in the main screen of CDS, and select Filters. Perform an open search by leaving the fields in the Find Filter search window blank and click OK. When the list of filters displays, click the Add button to create a new filter. In the Table Names window, find the table with the field on which you would like to filter. In this case, we are filtering on a field on the Custom tab, or Custom Fields table. Select the Custom Field table with a left-click then click OK.
When the Filter Dialogue window opens, use the pull down in the Column Name field to find the field with the data to be filtered. In this example, the Seminar field is selected. Note: The other custom fields that have not been modified still have their default names – Alphanum2, Alphanum3, and so on.

After selecting the column to filter, use the pull down list in the Value field to select the value, or data to be filtered. In this example, College Prep is selected. In the Operation section of the Filter Dialogue window, select the operator, or the way the filter relates to the value (data) in the selected column. In this example, the operator selected is Equal. In other words, the filter will find all values in the Seminar column equal to College Prep. With the correct criteria entered for the Column Name, Value, and Operation sections, click the Add button. The filter criteria will populate the Filter Criteria section.
With the filter criteria populated correctly, click **OK** and give the filter a name. For this example, the Filter name is College. A description is optional.

Now you can add the filter to a **Dynamic Report**. In the Advanced Fast Class example, a dynamic report to find the contacts who have attended the College Prep Seminar has already been started, but the Seminar field and the College Prep filter have not been added to it yet. To make modifications to a Dynamic Report, select **Reports** on the main menu from the main screen in CDS and click on **Dynamic Reports**. Find the dynamic report by entering the name of the report in the **Find Report Selection** window, or leave the fields blank to perform an open search. Once you find the report, left click on it in the **Report Selection** window then click on the **Modify Record** button on the tool bar. When the **Report Properties** window opens, you can make modifications to the dynamic report.

For this example, the Seminar field needs to be added on the **Column Definition** tab. To find the Seminar field, click on the **Table** pull down under the **Columns Available** section. Select **Custom Fields**. Select the Seminar column in the **Columns Available** section with a left click then move it to the **Columns Selected** section by clicking on the arrow pointing toward the **Columns Selected** section or by double-clicking on the Seminar entry.
To add the **College Prep** filter to the dynamic report, click on the **Selection Criteria** tab. In the first **Filter** field, click on the pull down arrow and look for the **College Prep** filter. Select the filter with a left click.

![Report Properties](image)

With the new column and filter added to the dynamic report, click the **Apply** button, then click **OK**. With the dynamic report selected in the **Report Selection** window, click on the **Running Man** icon to run the report. The report for this example will show all the contacts with the **College Prep** value entered in the **Seminar** field on the **Custom Field** tab.

![College Prep Seminar Attendees](image)

From the report spreadsheet summary, activities and correspondence can be created for a select group of contacts. Contact records can also be tagged and added to a set.