

Fast•Class File

Client Data System

Dynamic Report Download

Business Contact Report

This dynamic report that will display all primary contacts for Business contacts captured in CDS. This report also includes a filter that will identify all Business contacts with 10 employees or less. The filter can be easily removed to create listing of all primary contacts for Business contact records in 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**.

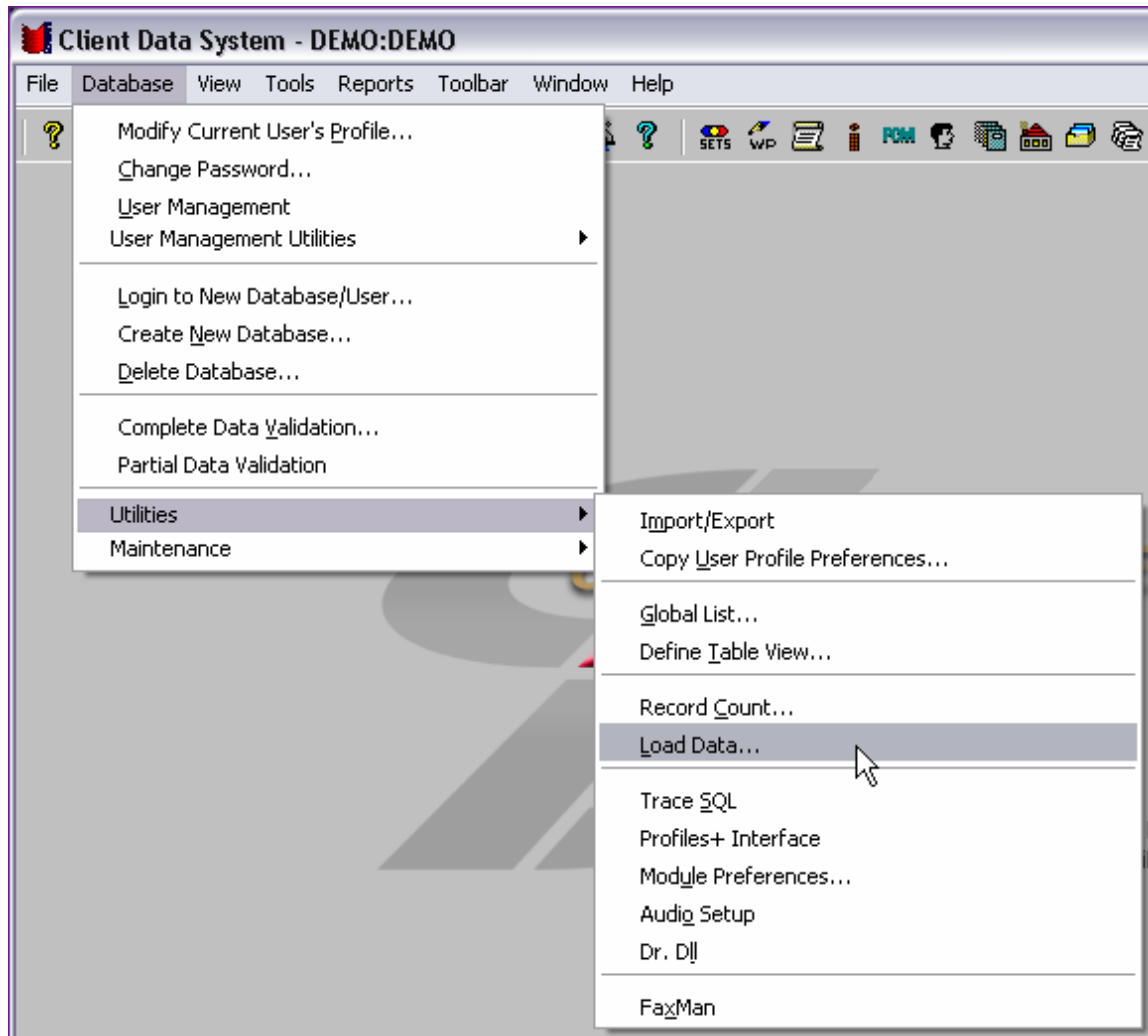


Figure 1: The Utilities menu (Load Data option selected).

- Select the **Other Files (*.dmp)** option in the **Select Data Load Options** window.

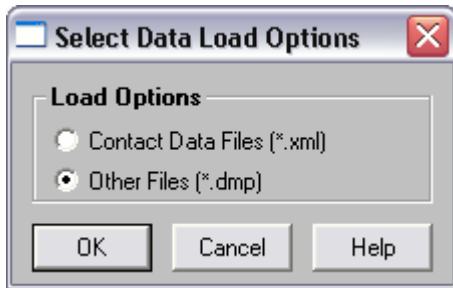


Figure 2: The Select Data Load Options window.

- Click **OK**.
- When the **Load File** window opens, use the **Look in** drop-down field to locate the **Bus_Con** folder.

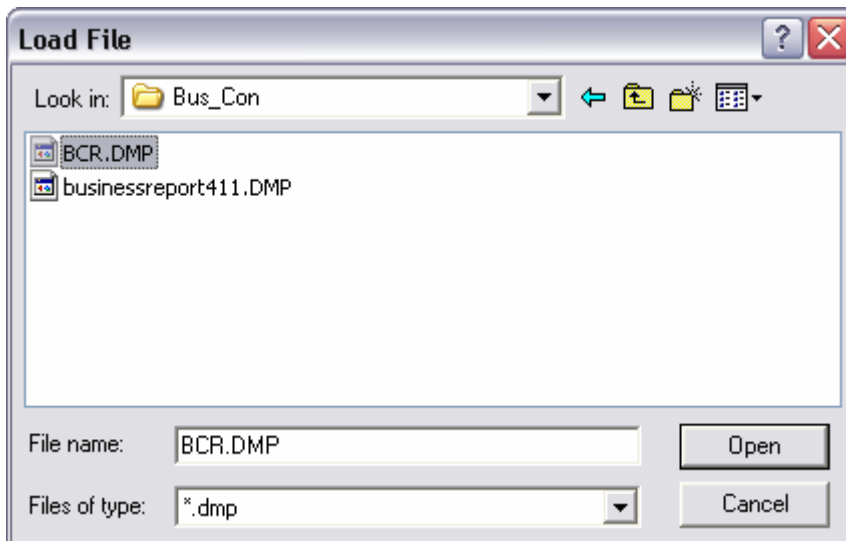


Figure 3: The contents of the Bus_Con folder viewed from the Load File window.

- Select the **BCR.DMP** file and click **OK**. The **Business Contact Report (10 Employees or less)** dynamic report with filter will be loaded into CDS.

*Note: Users on versions of CDS other than 4.3 should use the **businessreport411.DMP** file. The All phones and All Addresses column will not be a part of this report as those columns are unique to CDS Version 4.3.*

Using the Business Contact Report (10 Employees or less) Dynamic Report:

- Select **Reports** from the main screen of CDS.
- In the **Reports** menu, select **Dynamic Reports**.
- In the **Description** search field, type **Business Contact** and click **OK**.
- A summary screen will open with the **Business Contact Report (10 Employees or less)** dynamic report on display.
- To modify the dynamic report or view the filter criteria of the attached filters – select the **Business Contact Report (10 Employees or less)** dynamic report and click the **Modify Record** button.

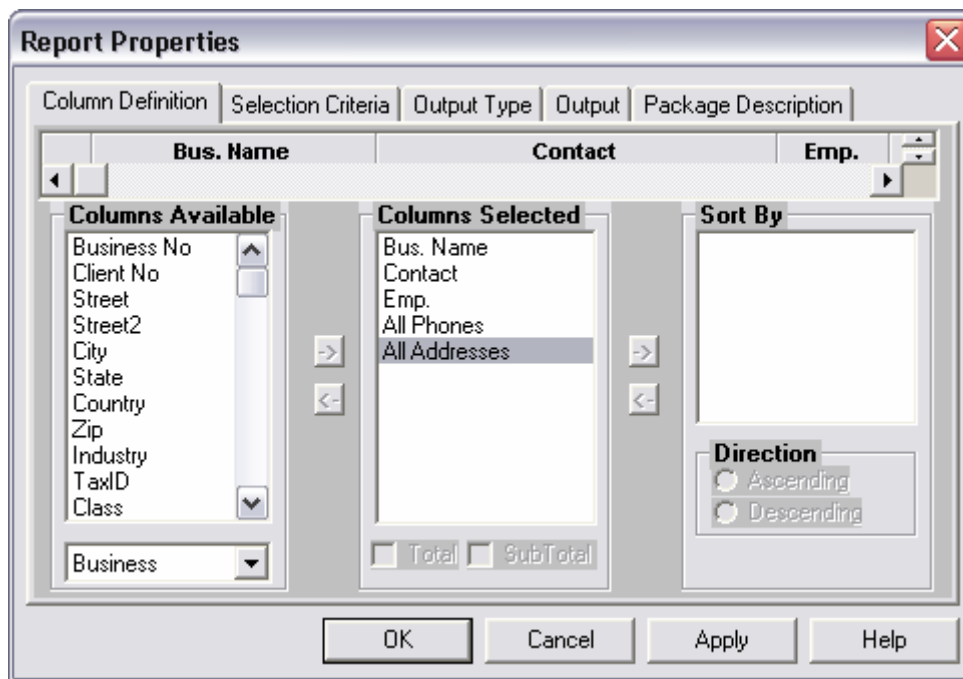


Figure 4: The Report Properties window of the Business Contact Report (10 Employees or less) dynamic report.

- To remove the filter limiting the report to business contacts with ten employees or less, click the **Selection Criteria** tab and clear the filter selection from the first filter drop-down field so that no filter is added to the report. You may also wish to change the name of the report on the **Package Description** tab by removing the **(10 Employees or less)** portion of the description.

To run the Business Contact Report (10 Employees or less) dynamic report:

- Double-click the report or select the report and click the **Run** button.



Figure 5: The Run button in the Report Selection Summary screen.