

Fast•Class File

Client Data System

Dynamic Report Download

Time Log Based Fee Report

This dynamic report that will calculate fees for time spent working with a client based on an hourly rate. The hourly rate and time data is captured in the **Time Log Information** window when making a Time Log entry in a contact record SmartPad.

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**.

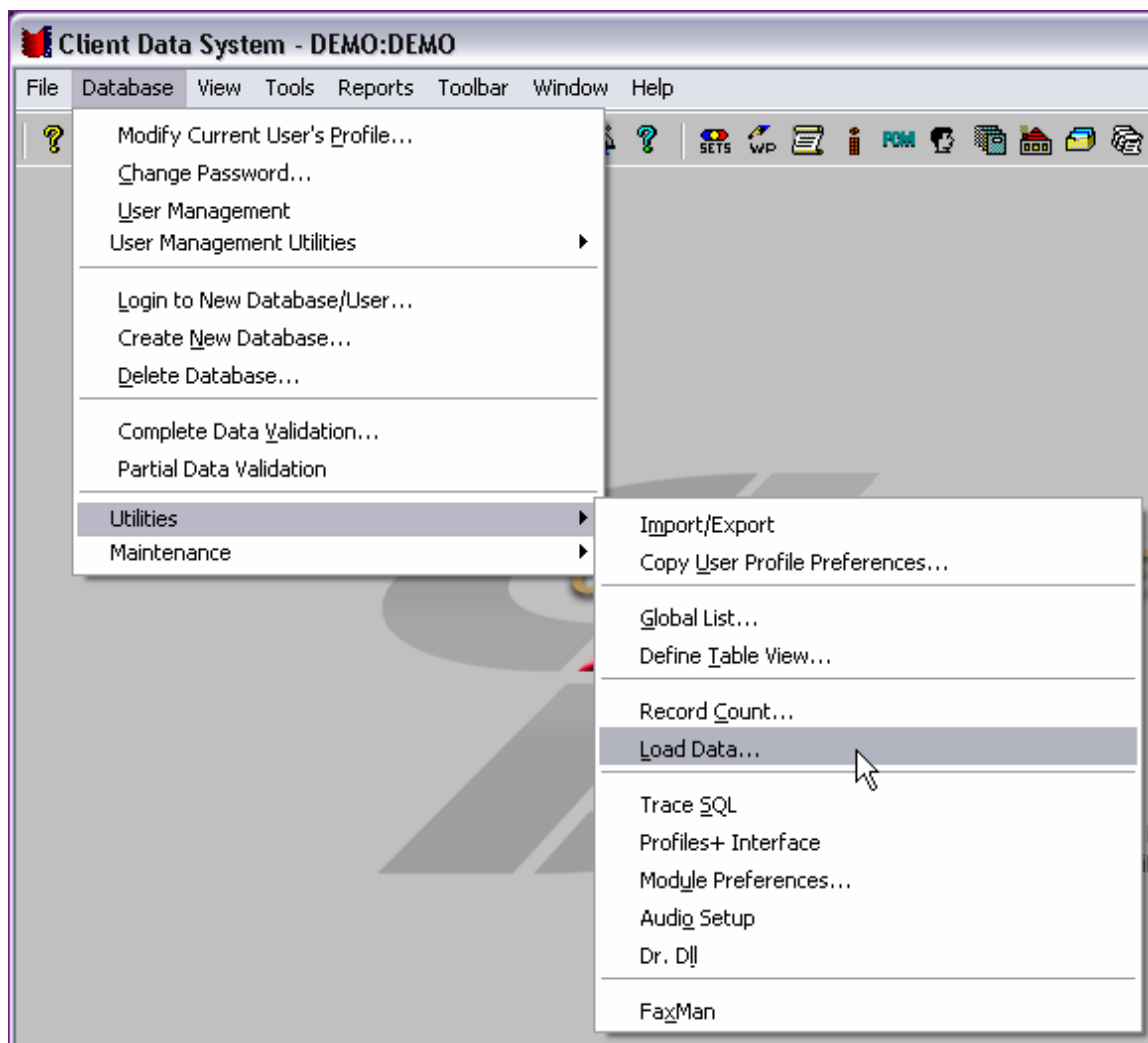


Figure 1: The Utilities menu (Load Data option selected).

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

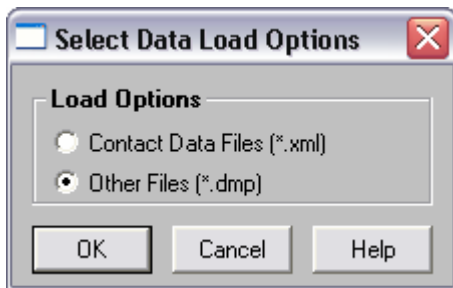


Figure 2: The Select Data Load Options window.

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

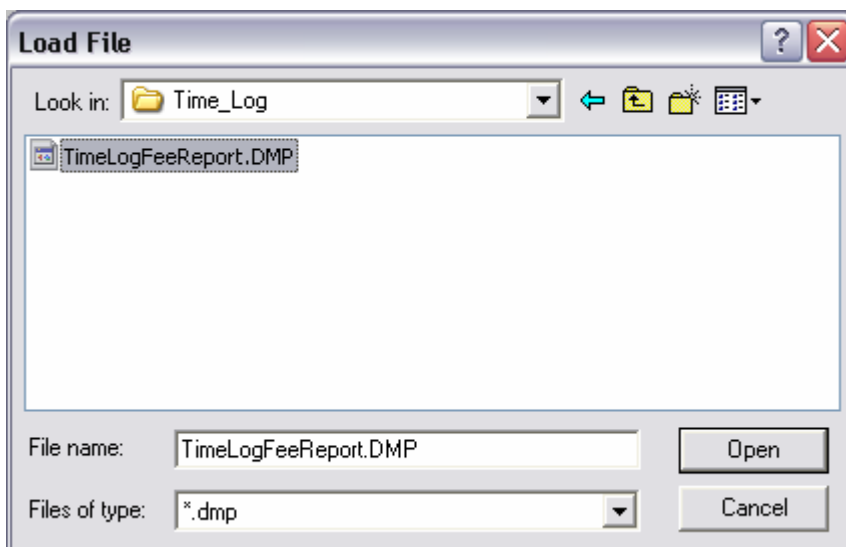


Figure 3: The contents of the Time_Log folder viewed from the Load File window.

- Select the **TimeLogFeeReport.DMP** file and click **OK**. The **Time Log Based Fee Report** dynamic report with filter will be loaded into CDS.

Using the Time Log Based Fee for Current Contact Dynamic Report

- Select **Reports** from the main screen of CDS.
- In the **Reports** menu, select **Dynamic Reports**.
- In the **Description** search field, type **Time Log** and click **OK**.
- A summary screen will open with the **Time Log Based Fee Report for Current Contact** dynamic report on display.
- To modify the dynamic report or view the filter criteria of the attached filters – select the **Time Log Based Fee Report for Current Contact** dynamic report and click the **Modify Record** button.

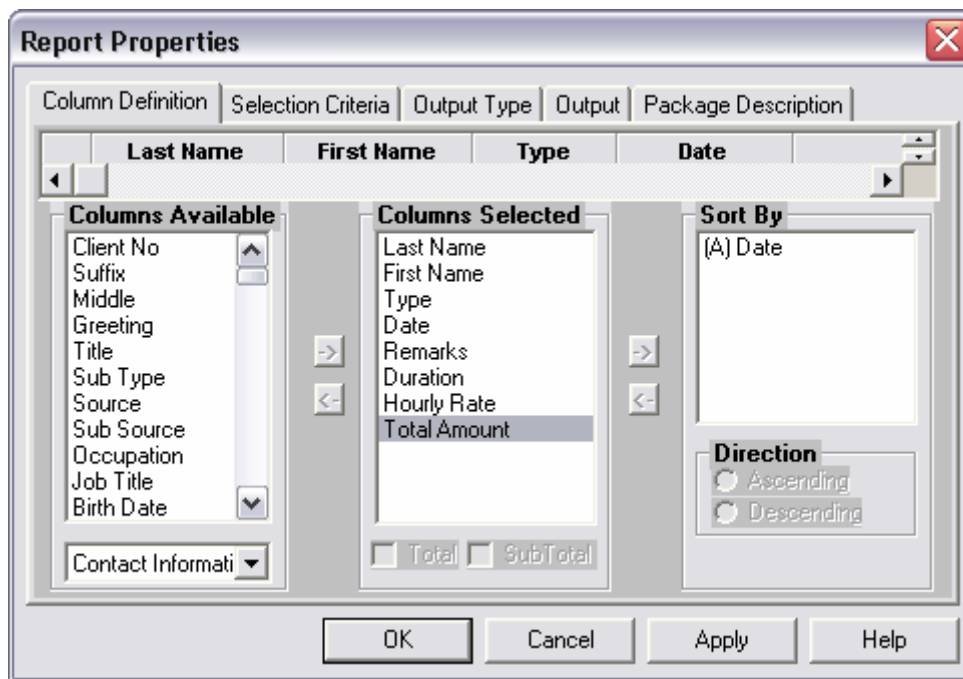


Figure 4: The Report Properties window of the Time Log Based Fee Report for Current Contact dynamic report.

To run the Time Log Based Fee for Current Contact 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.