Fast-Class File

Client Data System

Volume 54: Business Contact Report

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** summary 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 –
  - Column Name = **Emp.**
  - Value = **11**
  - Operation = **Less Than**
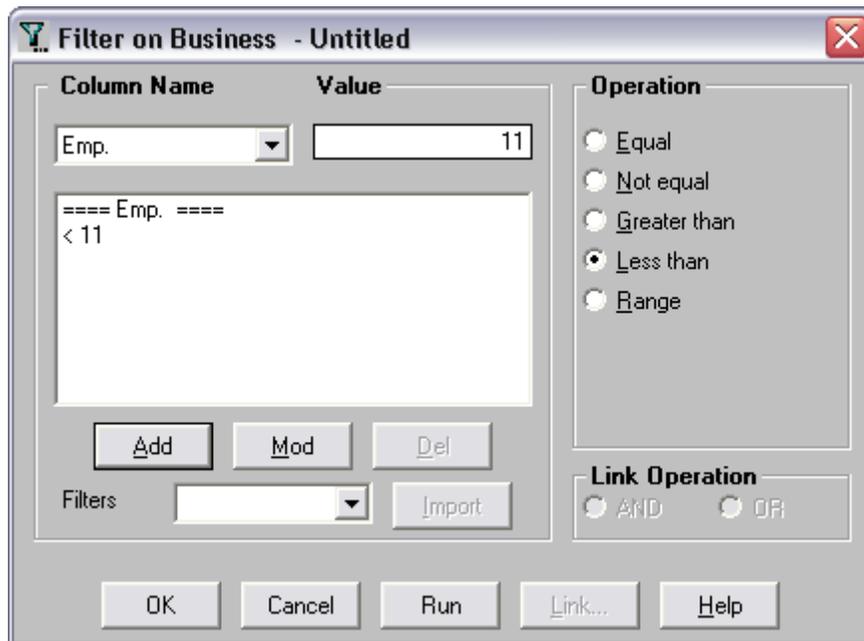- After selecting criteria click **Add**.

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** summary 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.
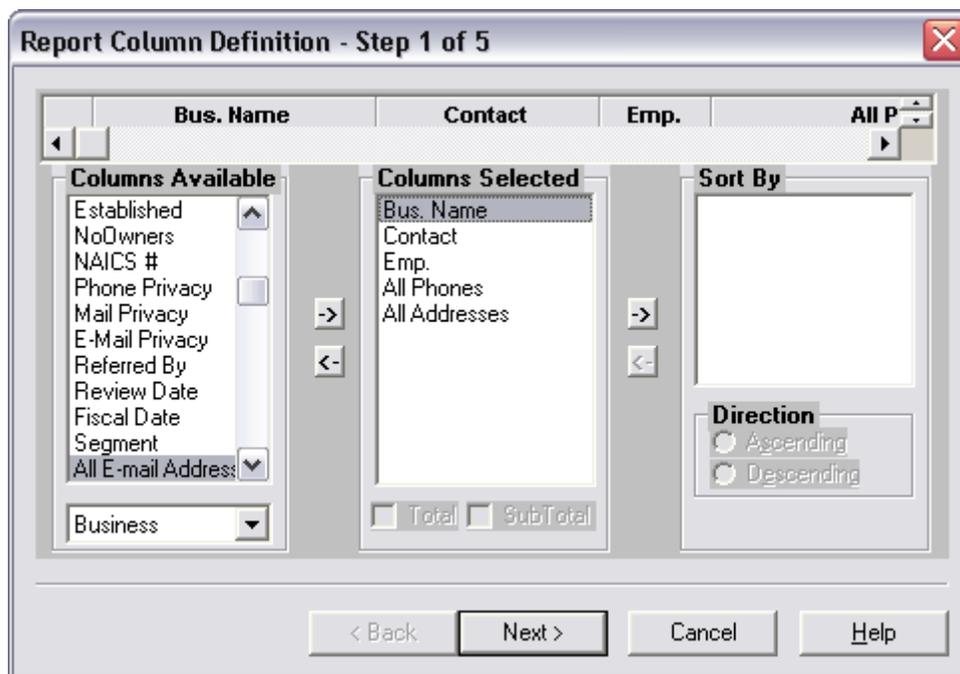

Figure 2: The Report Column Definition window (columns defined).

- 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.

Business Contact Report (9)

	Bus. Name	Contact	Emp.	All Phones	All Addresses
☐	ABC Manufacturing	Christiansen, Carolina	6	Business (Pref) : (310)-237-4882. Fax : (310)-982-7437.	Business (Pref) : 55 N. Main Street, Pasadena, CA, 91106.
☐	Joseph M. Ackerman, M.D., In	Ackerman, Joseph	4	Business (Pref) : (310)-839-3839.	Business (Pref) : 144 Wilshire Blvd. Suite 250, Los Angeles, CA, 90007.
☐	Ace Building	Loader, Ken	9	Business (Pref) : (818)-957-7288. Fax : (818)-957-8827.	Business (Pref) : 8772 Colorado Ave., Glendale, CA, 91221.
☐	Westlake Insurance Services	Smith, Margret	8	Business (Pref) : (323)-889-5547.	Business (Pref) : 773 W. Colorado, Los Angeles, CA, 90008.
☐	Universal Insurance Agency	Halverson, Randall	5	Business (Pref) : (626)-785-4192.	Business (Pref) : 912 S. Euclid Ave, Pasadena, CA, 91106.
☐	Lake Street Imports	Walsh, Regina	7	Business (Pref) : (626)-585-8879. Fax : (626)-585-9999.	Business (Pref) : 58 Lake Street, Pasadena, CA, 91106.
☐	Plato Tea Importers	Whittaker, Florence	10	Business (Pref) : (323)-669-6655. Fax : (323)-669-8855.	Business (Pref) : 9809 Davis Lane, Los Angeles, CA, 90038.

Figure 3: Results of the Business Contact Report – Employees 10 or less dynamic report.