

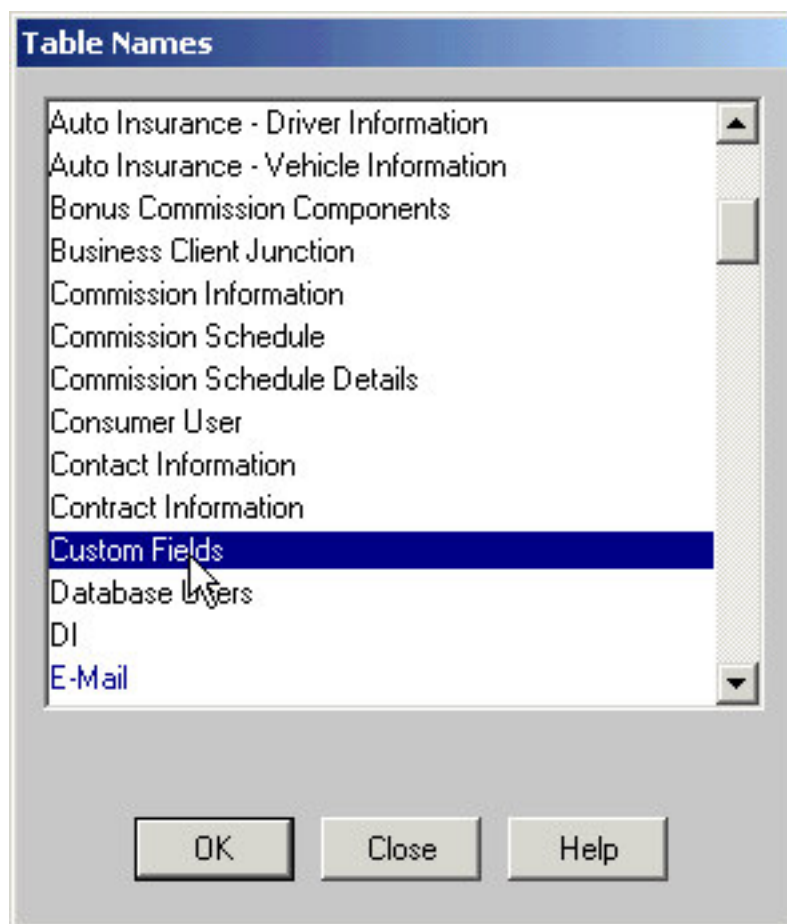
Fast•Class File

Client Data System

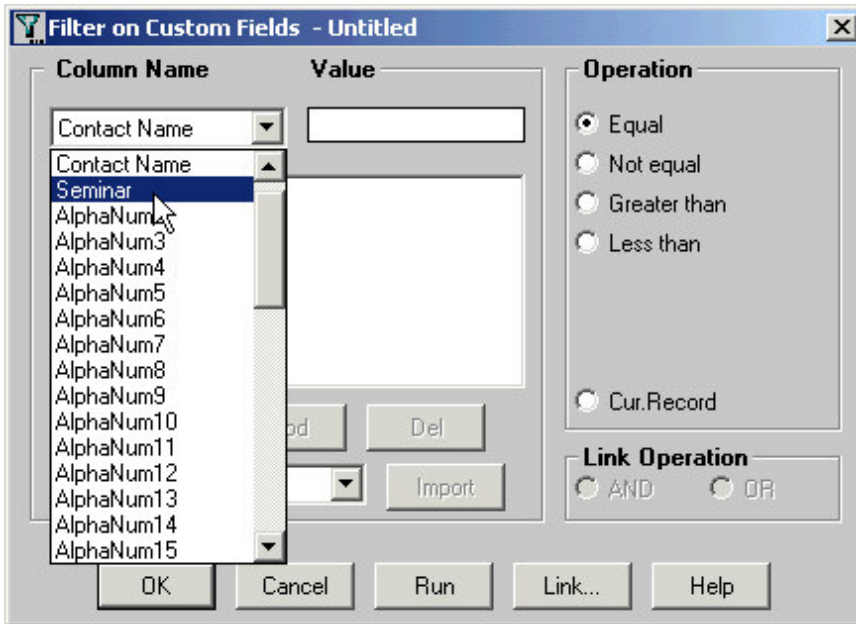
Advanced Fast Class: Mining Data in Custom Fields

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.

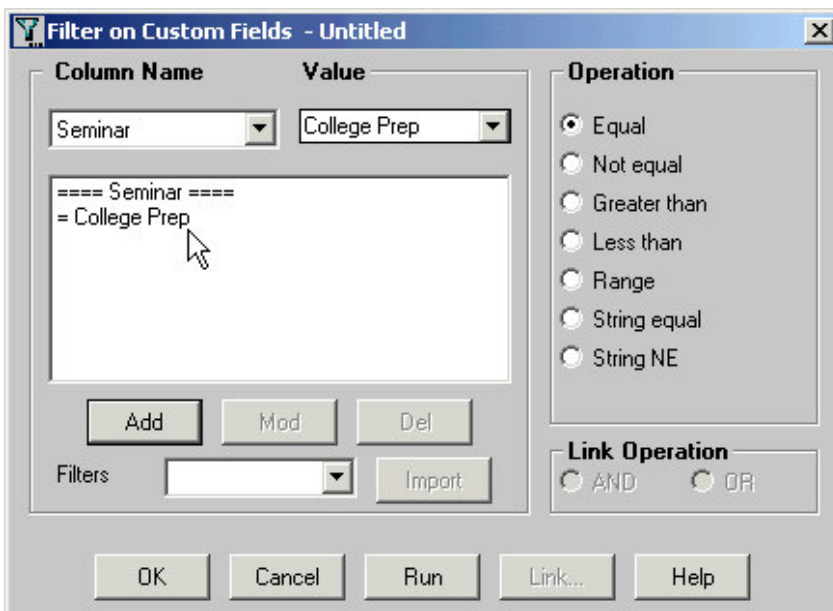
Before running the dynamic report, a filter must be built to find specific data entered in the **Seminar** field. To build a filter, click on the **View** menu in the main screen of CDS, and select **Filters**. Perform an open search by leaving the fields in the **Find Filter** search window blank and 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.*



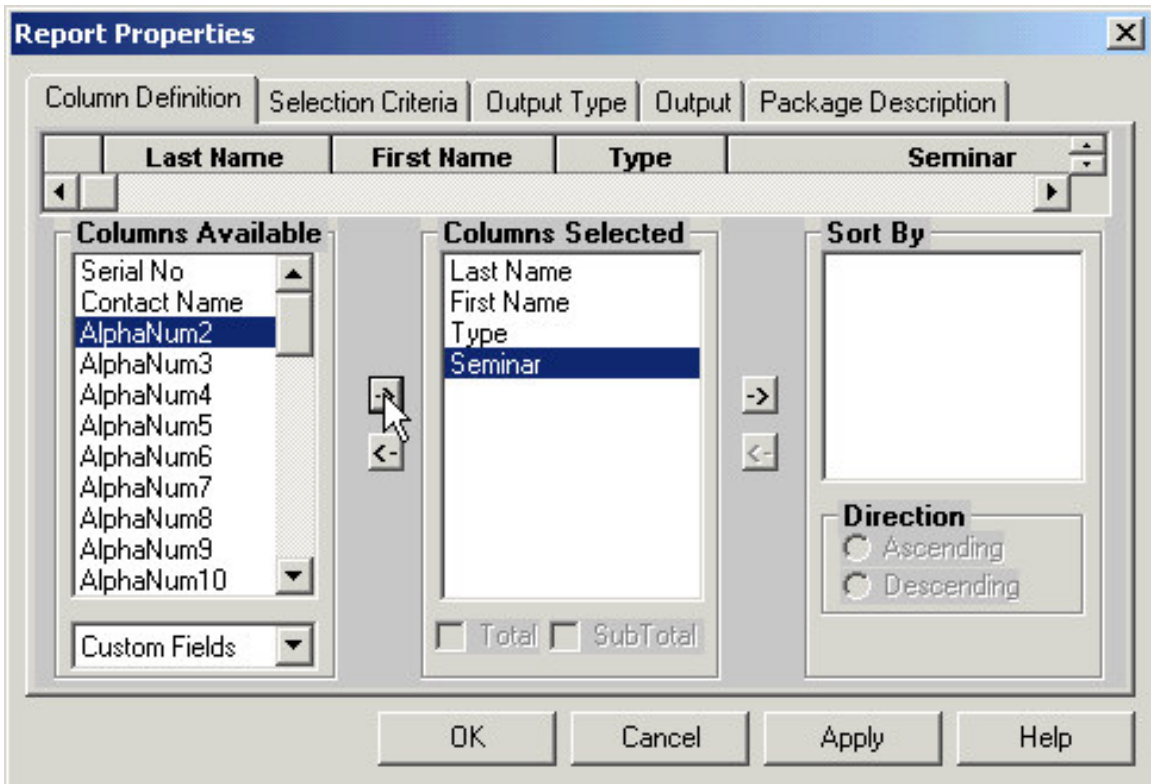
After selecting the column to filter, use the pull down list in the **Value** field to select the value, or data to be filtered. In this example, **College Prep** is selected. In the **Operation** section of the **Filter Dialogue** window, select the operator, or the way the filter relates to the value (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.



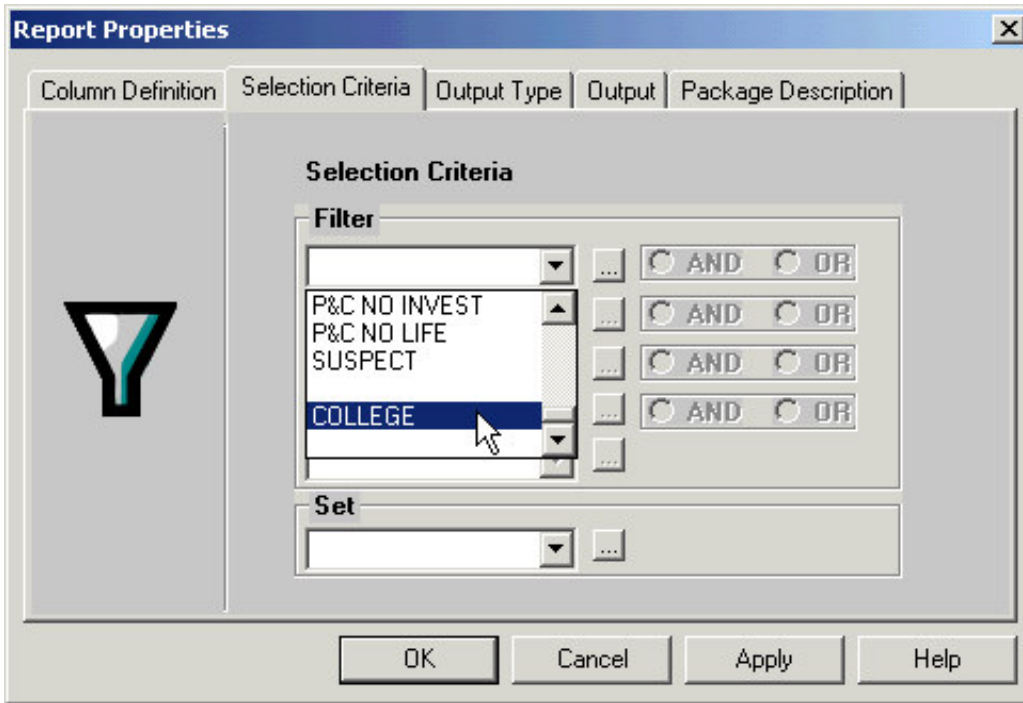
With the filter criteria populated correctly, click **OK** and give the filter a name. For this example, the Filter name is College. A description is optional.

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.



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 (8)				
	Last Name	First Name	Type	Seminar
<input type="checkbox"/>	Marquez	Larry	Client	Spreadsheet Correspondence
<input checked="" type="checkbox"/>	Loader	Ken		College Prep
<input checked="" type="checkbox"/>	Drake	Frank		College Prep
<input checked="" type="checkbox"/>	Schmidt	Randolf		College Prep
<input checked="" type="checkbox"/>	Polster	Karen		College Prep
<input checked="" type="checkbox"/>	Whittaker	Florence		College Prep
<input checked="" type="checkbox"/>	Gerkin	Harry		College Prep
<input checked="" type="checkbox"/>	Walsh	Regina		College Prep

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.

