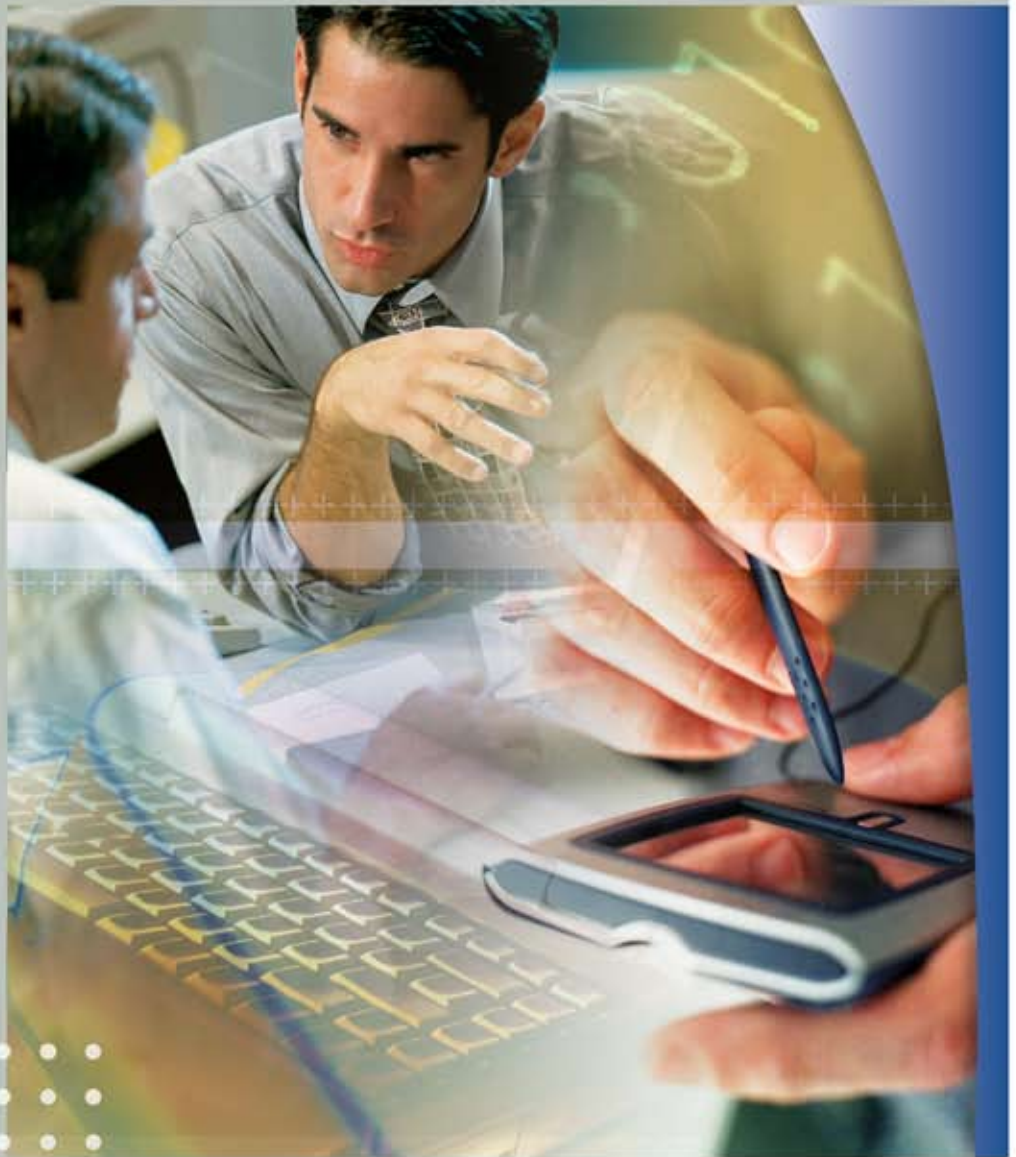


SmartOffice®

User Guide



Filters, Sets, and Dynamic Reports

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918 E. Green Street

Pasadena, CA 91106

Web: <http://www.ezdata.com>

Telephone: (626) 585-3505

Fax: (626) 440-9097

U.S. toll-free fax: (800) 779-3123

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Introduction

This document provides an overview of the navigation, terminology, and logic of Filters, Sets, and Dynamic Reports™ in SmartOffice.

Overview

Filters

A database management system such as SmartOffice can hold large amounts of data. Without filters, the time required to examine large numbers of records in order to identify those that share a common characteristic would defeat the purpose of using advanced technology for managing information.

A filter reads the entries in at least one column of the records and compares these entries with an entry that is designated as the search criterion. Records possessing entries that match the search criteria are identified and listed. A variety of operations based on Boolean algebra and set theory can be applied to make the filtration more efficient and flexible.

In SmartOffice, there are two types of filters: filter records and single-use filters. Filter records are database records that are used to filter other database records. Specific tables, columns, criteria, and operators are all stored for subsequent use at various strategic positions within SmartOffice (usually Search dialog boxes). By contrast, single-use filters are most often used on the spreadsheet list pages that are used to detail records. Single-use filters are often limited to the currently open page and are restricted to only one column of the list. Single-use filter entries cannot be saved.

Sets

A set is an additional record-grouping utility that supplements filters. Without sets, there would be no way to conveniently define and access a group of records that bear no similarity discernable to the database. The usefulness of sets becomes apparent when a set is composed partly by a filter and partly by ad-hoc selection, creating a group of records that could not have been composed by the use of filters alone. Use sets to group records for target marketing purposes such as pre-approach mailings or seminar invitations.

Records can be freely added or removed from a set. Sets can also be validated manually or automatically. Any of the allowed record types can be a member of any number of different sets.

Dynamic Reports

Dynamic Reports is a powerful reporting method that is used to specify customizable report information with the use of Sets or Filters. This information is then exported to a predefined Microsoft® Excel Template.

Requirements

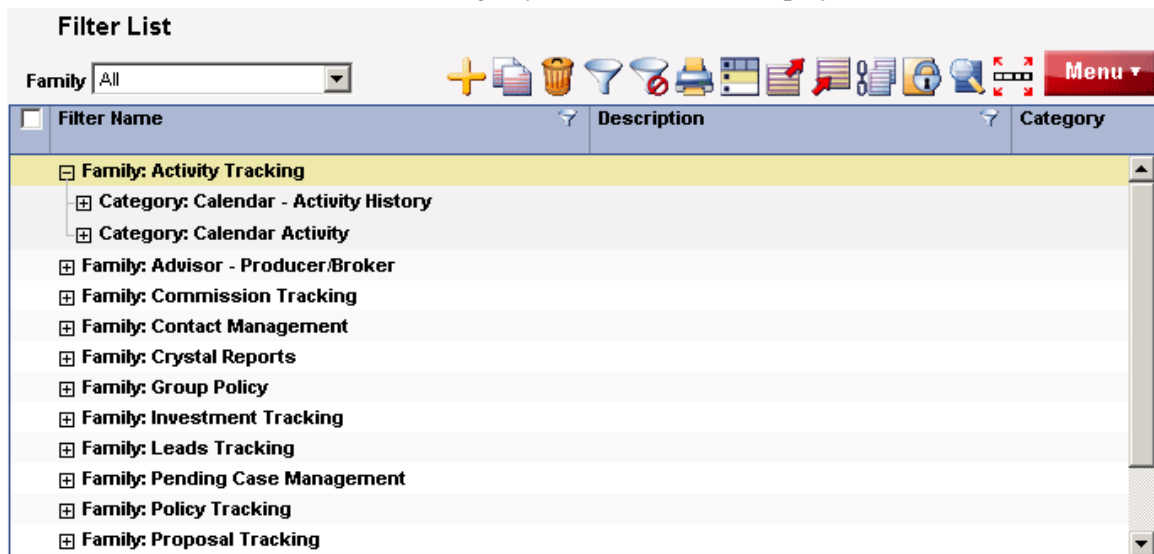
SmartOffice includes predefined system Filters and Dynamic Reports. Only System Office users can define and modify this information. System filters and Dynamic Reports are highlighted in cyan when they display in a list. Regular filters and Dynamic Reports are created, displayed, modified, and deleted by all users within the same office.

Navigation

Filters

Filter List

1. From the side menu, click **Setup** and then select **Filters** from the expanded list to open the Search Filters dialog box.
2. Click the **Search** button without entering any search criteria to display the Filter List.



Filter List Buttons

- **New:** Click this button to add a new filter.
- **Copy:** Click this button to copy an existing filter.
- **Delete:** Click this button to delete selected records from the list.
- **Apply List Filter:** Click this button to specify a filter option for the records on the list.
- **Undo List Filter:** Click this button to clear an existing filter.
- **Print List:** Click this button to print the Filter List.
- **Customize List Layout:** Click this button to customize the details that should display on the list. Select which columns to display, specify a width for each column, define sort order, set truncation, subtotal, and total specified columns.
- **Export - Filter Definition:** Click this button to export the Filter Definition to XML.
- **Import - Filter Definition:** Click this button to import an XML Filter Definition to SmartOffice.
- **Show Linked Dynamic Report and Set:** Click this button to display the Dynamic Reports and Sets that are linked to the selected filter.
- **Mark Private:** Select a filter and then click this button to prevent the filter from being seen by other users.
- **Search:** Click this button to begin a search for the selected filter type.
- **Expand All:** Click this button to expand the entire tree structure of the spreadsheet so that all records in the listing are viewable. Click this button again to collapse the structure back so that only the top folders in the hierarchy are showing.

Sets

Set List

1. From the side menu, click **People & Companies** and then select **Sets** from the expanded list to open the Search Sets dialog box.
2. Click the **Search** button to display the Set List.



Set List

Show My Favorites

+ 🗑️ 🔍 🚫 🖨️ 📄 🔒 🔍 🔄 📄 📄 Menu ▾

List | Detail (P) | Set Members |

<input type="checkbox"/>	Set Name ↑	Description	Member	Created On	Modified On	Filter Only
<input type="checkbox"/>	A Clients	List of A SubType Clients	33	02/12/2001	03/24/2006	No
<input type="checkbox"/>	A-H	Last Name Starts with A - H	168	01/09/2002	03/24/2006	No
<input type="checkbox"/>	A=Client Apprec.Event - Golf '03	A = Client Appreciation Event - Golf 2003	0	01/06/2003		No
<input type="checkbox"/>	Advisor Mailing List	All Advisors in the system	11	04/19/2001	12/28/2003	No
<input type="checkbox"/>	Age 50 And Over	List of Contact ages 50 and over.	76	02/14/2001	12/28/2003	No
<input type="checkbox"/>	Annual Function	InsurMark Annual Meeting	2	03/22/2005	03/22/2005	No
<input type="checkbox"/>	Annuity - Marketing Brochure	Annuity Marketing Brochures for Distributors	5	03/28/2005	03/28/2005	No
<input type="checkbox"/>	Annuity Prospect	Candidates to Purchase Annuity.	10	05/12/2003	05/12/2003	No
<input type="checkbox"/>	B = Nice Pen - Labels 2003		0	01/06/2003		No
<input type="checkbox"/>	Clay_02/16/2007		1	02/16/2007	02/16/2007	No
<input type="checkbox"/>	Clay_02/16/2007		1	02/16/2007	02/16/2007	No

Records Shown: 28 Total Records: 28

Set List Buttons

- **New:** Click this button to add a new set.
- **Delete:** Click this button to delete the selected set(s).
- **Apply List Filter:** Click this button to specify a filter option.
- **Undo List Filter:** Click this button to clear an existing filter.
- **Print List:** Click this button to print the list.
- **Customize List Layout:** Use this button to customize the set details that will display on the list. The user can select the columns to display, specify a width for each column, define sort order, set truncation, subtotal, and total specified columns.
- **Mark Private:** Select a set and then click this button to prevent the set from being seen by other users.
- **Search:** Click this button to begin a search for the selected set type.
- **Add New Members to the Tagged Sets:** Select the appropriate set(s) and then click this button to add members to the set(s).
- **Marketing Options:** Select a set and then click this button to open the Marketing Options dialog box.
- **Validate Tagged Sets:** Select one or more sets and then click this button to validate the sets.
- **Go to Contact List:** Select a set and then click this button to display the contact list of set members.
- **Set Total Record Count for the List:** Click this button to count the total number of records present on the list.

- **Export List:** Click this button to export the data in the spreadsheet to CSV, XML, or TAB Separated format. Microsoft® Word, Microsoft® Excel, Web Browsers, and Notepad can be used to display exported data.

Set List Dialog Box

1. From the Contact List, select a contact and then click the **Add to Set** button to open the Search Sets dialog box.
2. Without entering any search criteria, click the **Search** button to open the Set List dialog box.
3. Select the appropriate set(s) and then click the **OK** button; or, click the **New** button to create a new set.

Set List

From the Set List, select a set and then click the **Set Members** content link to display the Set Member List.

Set Membership List

From the contact's **Add'l Personal** tab, the Set Membership section displays all sets for which the contact is a member.

Contact List of Set Members

From the Set List, tag a set and then click the **Go to Contact List** button to display the Contact & Business List. Note that SmartOffice will populate the Contact & Business List with members, one set at a time. If more than one set is selected, by default, the first one is considered.

Excel Templates

Excel Template List

1. From the side menu, click **Setup** and then select **Excel Templates** from the expanded list to open the Search Excel Templates dialog box.
2. Click the **Search** button to display the Excel Template List.

Excel Template List			
<input type="checkbox"/>	Image Description	Keyword	Created On
<input type="checkbox"/>	Opportunity	Opportunity	03/21/2005 06:25PM
<input type="checkbox"/>	Production Analysis	Production Analysis Excel Report	03/25/2005 05:55PM
<input type="checkbox"/>	Agency Gross Revenue		04/05/2005 03:43PM
<input type="checkbox"/>	Agency Gross Revenue #2	Agency Gross Revenue	04/05/2005 04:13PM
<input type="checkbox"/>	Expected vs Received Template	Expected Vs Received	02/21/2006 11:10AM

Records Shown: 5 Total Records: 5

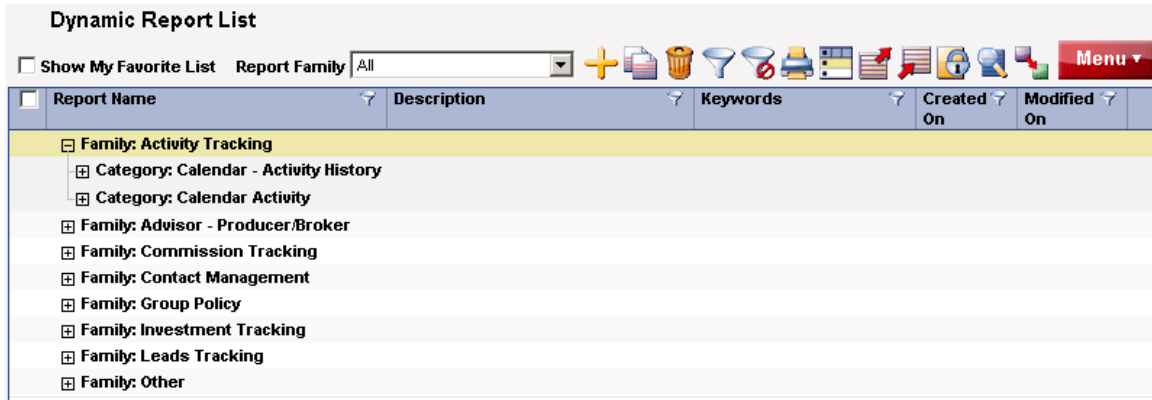
Excel Templates List Buttons

- **New:** Click this button to add a new Excel Template.
- **Delete:** Click this button to delete the selected Excel Template(s).
- **Upload file from URL:** Click this button to upload an Excel file.
- **Print List:** Click this button to print the Excel Template List.
- **Customize List Layout:** Use this button to customize the details that will display in the list. The user can select the columns to display, specify a width for each column, define sort order, set truncation, subtotal, and total specified columns.

Dynamic Reports

Dynamic Report List

1. From the side menu, click **Reports** and then select **Dynamic Reports** from the expanded list to open the Search Dynamic Reports dialog box.
2. Click the **Search** button to display the Dynamic Report List.

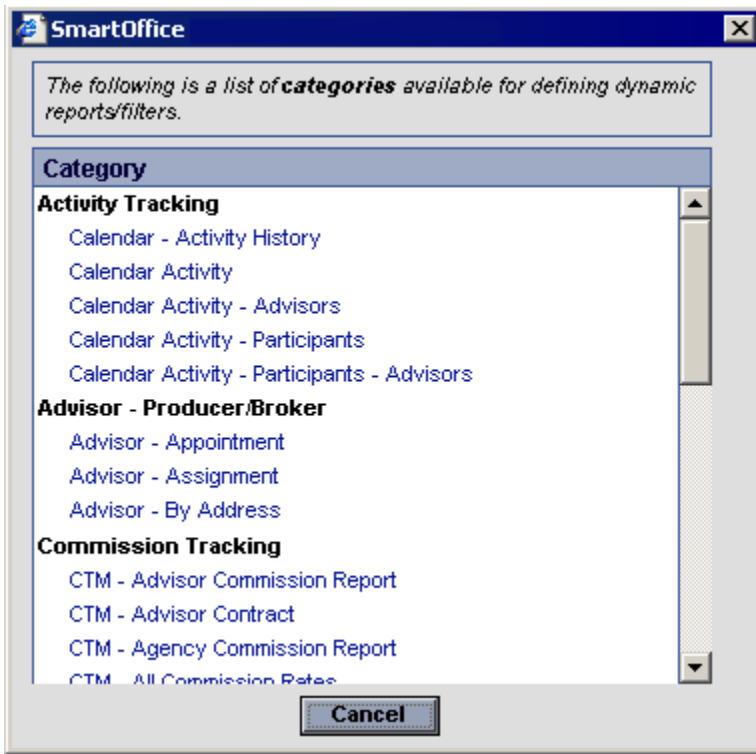


Dynamic Reports List Buttons

- **New:** Click this button to add a new Dynamic Report.
- **Delete:** Click this button to delete the selected Dynamic Report(s).
- **Execute Packaged Options:** Select a report and then click this button to generate the report.
- **Copy:** Click this button to copy an existing Dynamic Report.
- **Modify:** Select a report and then click this button to modify the report.
- **Apply List Filter:** Click this button to filter the reports.
- **Undo List Filter:** Click this button to clear an existing filter.
- **Print List:** Click this button to print the Dynamic Report List.
- **Customize List Layout:** Use this button to customize the details that will display on the list. Select the columns to display, specify a width for each column, define sort order, set truncation, subtotal, and total specified columns.
- **Export List:** Click this button to export the data in the list to CSV, XML, or TAB Separated format. Microsoft® Word, Microsoft® Excel, Web Browsers, and Notepad can be used to display exported data.
- **Run Report:** Select a report and then click this button to generate the report.
- **Export Dynamic Report Definition:** Select a report and then click this button to export the Dynamic Report settings to XML format.
- **Import Dynamic Report Definition:** Select a report and then click this button to import the Dynamic Report settings from an XML file.

Dynamic Reports Category List

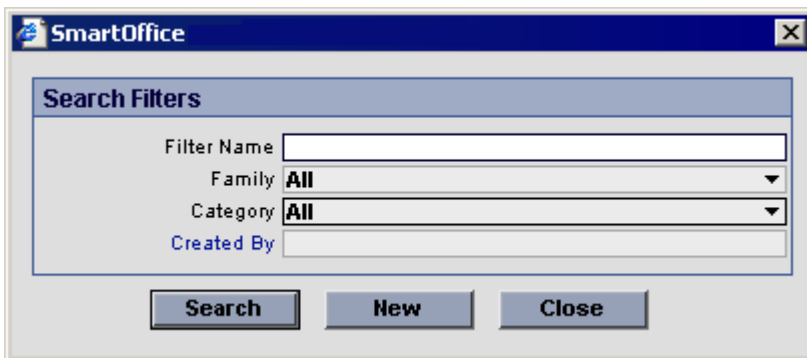
From the Search Dynamic Reports dialog box, without entering any search criteria, click the **New** button to display the Category dialog box.



Components of Filters

Search Filters

From the side menu, click **Setup** and then select **Filters** from the expanded list to open the Search Filters dialog box. This dialog box is used either to search for existing filters or to create a new filter.



- **Filter Name:** Enter the name of the filter to be located/created or leave it blank to list the filters by category.
- **Category:** Select the required category from the drop-down list. Select **All** from the corresponding drop-down list to display all filters.

Note: It is not mandatory to provide the filter name or category.

- **Created By:** Select the required User Name from the drop-down list.
- **Search Button:** Click this button to search for filter(s). When no filter name or category is provided, select this button to list all filters.
- **New Button:** Click the **New** button to create a new filter.

Apply a Filter

Ways to apply a filter:

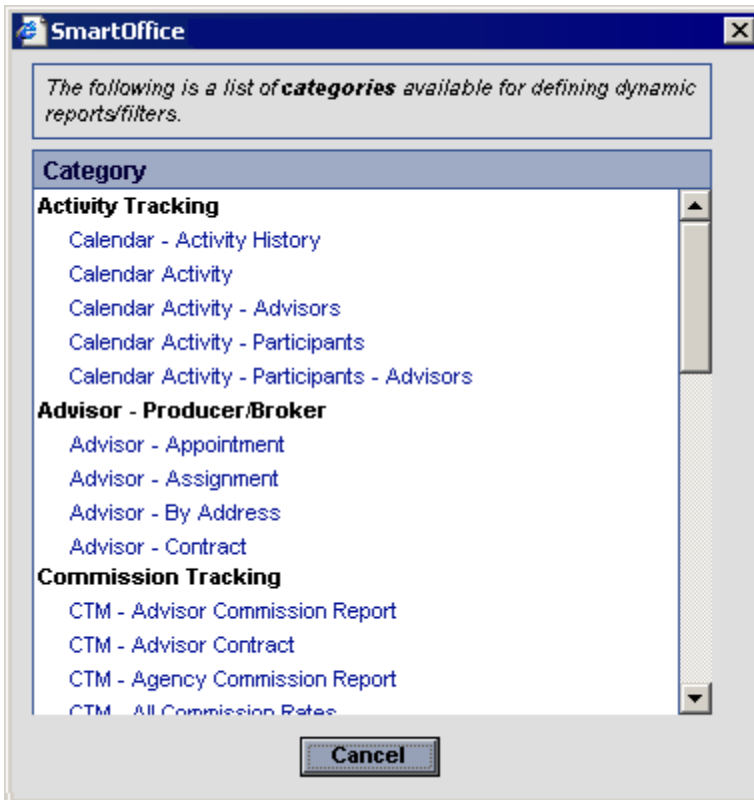
- All modules in SmartOffice that make use of the available filters provide a hyperlink called **Filters** in their respective Search dialog boxes. The user can directly specify the name of the filter in this field, in which case the filter condition is applied to the records. The user can also click the hyperlink to open the Filter List dialog box.
- A filter can be attached to a set. Refer to the *Sets* section for more information.
- A filter can be attached to a Dynamic Report. Refer to the *Dynamic Reports* section for more information.

Create a New Filter

Filters are based on a filter category. The Filter Category dialog box lists all available categories on which a filter can be based.

Ways to access the Category dialog box:

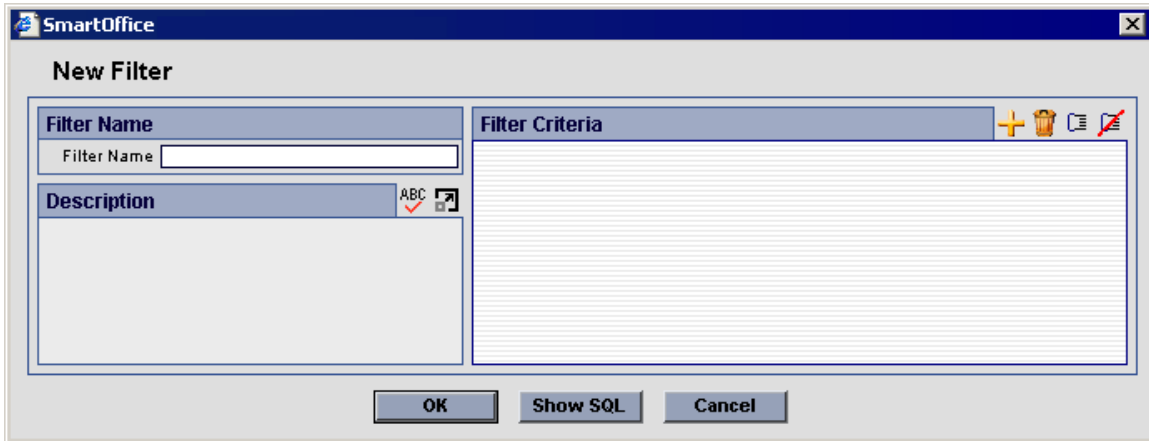
- Without specifying a category in the Search Filters dialog box, click the **New** button.
- From the Filter List, click the **New** button.



New Filter Dialog Box

The New Filter dialog box is used to specify the details pertaining to the new filter and can be accessed in the following ways:

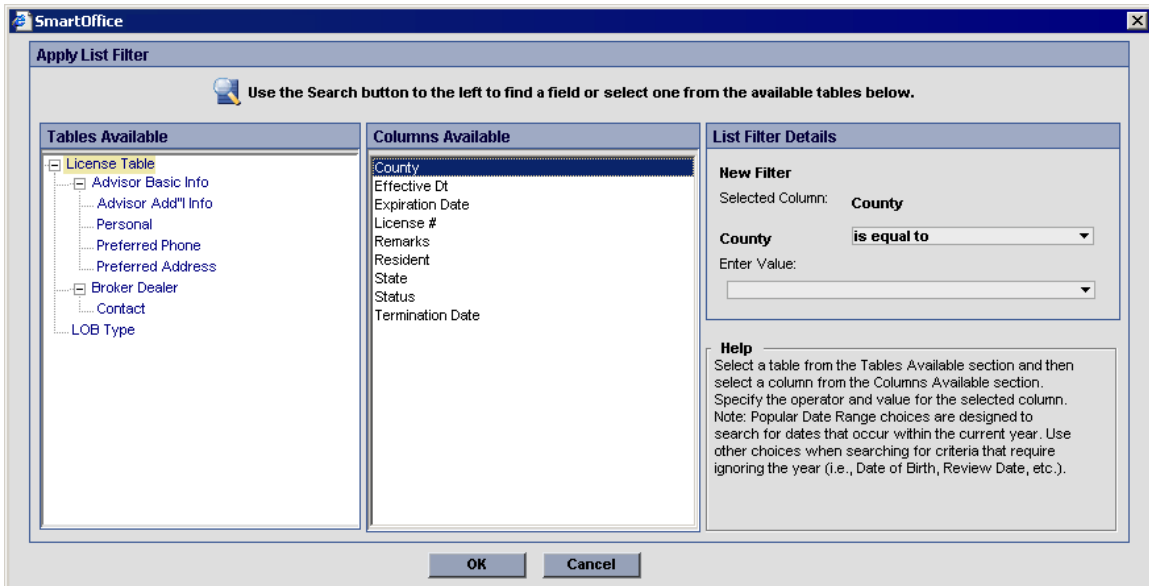
- Select the required category in the Search Filters dialog box and then click the **New** button.
- From the Filter List, click the **New** button.
- From the Category dialog box, select the appropriate category hyperlink.



- **Filter Name:** Specify the name of the new filter in this field.
- **Description:** Provide a description for the new filter.
- **Filter Criteria:** This section displays the list of columns and the corresponding applied filter. Click the **New** button to create a filter setup for the new filter.
- **Show SQL Button:** Click this button to view the equivalent SQL generated for the filter.

Apply List Filter Dialog Box

In the New Filter dialog box, click the **New** button in the Filter Criteria section to open the Apply List Filter dialog box.

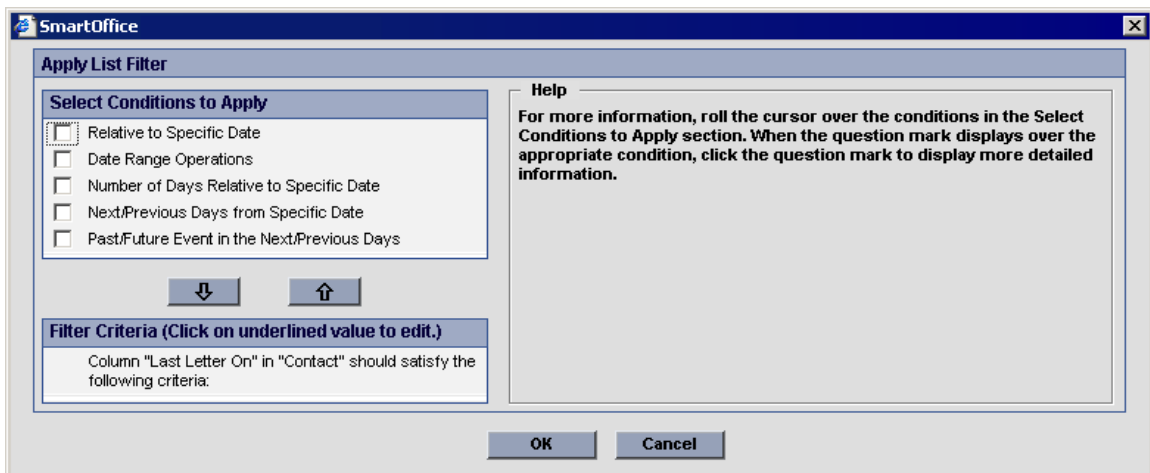


- **Tables Available:** This section lists all available tables that can be used to create a filter.
- **Columns Available:** This section lists all the columns available in the table that have been selected in the Tables Available section.
- **New Filter:** This field displays the name of the selected table.
- **Selected Column:** This field displays the name of the selected column.
- **Operator:** The Operator list box lists all operators. This list depends on the field type of the column selected in the Columns Available section.
- **Enter Value:** Specify a value for the selected column. For a particular field, if the operator selected is Less Than and the value specified is 10, all records in which the value of the selected field matches the condition “<10” are extracted.
- **Help:** This section provides brief instructions to create the filter setup.

Advanced Date Options Dialog Box

Use predefined options to simplify the task of specifying complex conditions for a date field while creating filters.

1. From the Apply List Filter dialog box, specify the table and date-specific column information and then select **Advanced** from the drop-down list.
2. From the Select Conditions to Apply dialog box, specify the condition and description information and then click the **OK** button.



- **Select Conditions to Apply:** This section displays a list of advanced date conditions that are used to create filters. Select the required condition and then click the **Down Arrow** button.
- **Filter Criteria:** This section displays a list of selected criteria as hyperlinks. Click any link to modify the values.
- **Help:** This section explains how to use the advanced date options.

Report Category Dialog Box

The Report Category dialog box is used to select or create a filter and displays all filters pertaining to a specific category. To use filters to search for a group of contacts:

1. From the side menu, click **People & Companies** and then select **Contact/Businesses** from the expanded menu to open the Search Options dialog box.
2. Click the **Filter** hyperlink to open the Filter List dialog box.
3. Click the appropriate Filter hyperlink to display a list of contacts with the selected filter applied.

Copy an Existing Filter

Instead of repeatedly modifying the same filter, a filter can be copied and then modified to serve a different purpose.

1. From the Filter List, tag a filter and then click the **Copy** button to open the New Filter Information dialog box.
2. Enter the name and description for the new filter and then click the **OK** button to save the filter to the Filter List.
3. Click the appropriate Category hyperlink to specify additional filter criteria.

Import - Filter Definition

1. From the side menu, click **Setup** and then select **Filters** from the expanded list to open the Search Filters dialog box.
2. Click the **Search** button to display the Filter List.
3. Click the **Import Filter Definition** button to open the Import - Filter Definition dialog box.
4. Click the **Browse** button to locate the XML file to be imported from the Choose File dialog box.
5. Select the file and then click the **Open** button to open the file.
6. Click the **OK** button to import the data from the XML file.

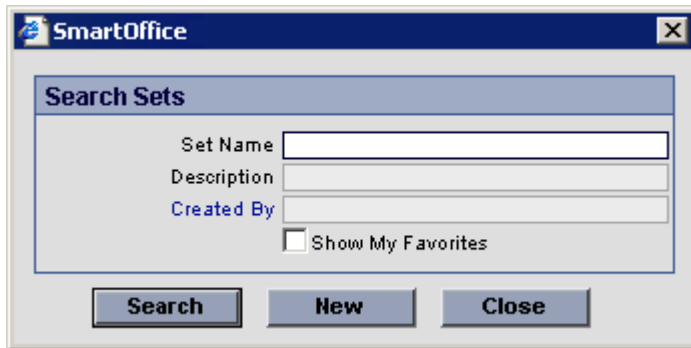
Export - Filter Definition

1. From the side menu, click **Setup** and then select **Filters** from the expanded list to open the Search Filters dialog box.
2. Click the **Search** button to display the Filter List.
3. Click the **Export Filter Definition** button to display the Filter Definition in XML format so it can be used in other programs.

Components of Sets

Search Sets

From the side menu, click **People & Companies** and then select **Sets** from the expanded menu to open the Search Sets dialog box. Using the Search Sets dialog box, a user can either search for existing sets or create a new set. Sets can be located based on the set name, description, or creator.



- **Set Name:** Enter the set name to be located, or do not enter any search criteria and then click the **Search** button to display the Set List.
- **Description:** Enter the Description. The first few characters of the description are sufficient to locate a matching set.
- **Created By:** Select the required User Name by clicking the **Created By** hyperlink from the drop-down list.
- **Search:** Click this button to begin the search process. When no set name or description is provided, click this button to list all sets.
- **New:** Click the **Add** button to add a new set.

Apply a Set

There are two ways of applying a set:

- Contact-related modules in SmartOffice make use of available sets by providing a hyperlink called **Sets** in their respective Search dialog boxes. The user can directly specify the name of the Set in this field, in which case the Set condition is applied to the records. The user can also click the hyperlink to open the Set List dialog box.
- A Set can be attached to a Dynamic Report. Refer to the *Dynamic Reports* section for more information.

Create a New Set

Create a Set from the Search Sets Dialog Box

1. From the Search Sets dialog box, click the **New** button to open the Select Set Type dialog box.
2. Select the appropriate Set Type hyperlink to open the New Set dialog box.
3. Enter the set information and then click the **OK** button.

The screenshot shows the 'New Set' dialog box in SmartOffice. The 'Set Information' section includes a text field for 'Set Name', a dropdown for 'Set Type' (currently set to 'Contact'), and a checkbox for 'Do Not Allow Deletion/Modifications by Other Users'. Below this, it displays '# of Members: 0', 'Created On: 09/10/2007', and 'Modified On: 09/10/2007'. The 'Description' field is empty. The 'Filter(s) Associated with this Set' section has a text area with the instruction: 'In order for validation to automatically update set members, please select one or more filter(s) from the list below:'. There is a checkbox for 'Add Set Members by Filter Only (No ad hoc selection)'. The 'Selected Filter List' is currently empty. At the bottom, there are 'OK' and 'Cancel' buttons.

- **Set Name:** Enter the set name.
- **# of Members:** Indicates the number of members in the set and is automatically generated.
- **Created On:** Indicates the creation date.
- **Created By:** Displays the name of the user who created the set.
- **Modified On:** Indicates the date on which the set was last modified.
- **Modified By:** Displays the name of the user who modified the set.
- **Description:** Enter a description for the set. The sets can be located based on this description.
- **Filter(s) Associated with this Set:** Select the **Add Set by Filter Only (No ad hoc selection)** option to create the set based upon filters only.
- **Selected Filter List:** Displays the list of filters used for creating the set. Use the **New** button to create a filter.

Creating a Set from the Set List

1. From the Set List, click the **New** button to open the Select Set Type dialog box.
2. Click the appropriate hyperlink to display the New Set Detail content link.
3. Enter the set information and then click the **Save** button.

Add Members to a Set from the Contact List

1. From the Contact List, tag the contacts to be added to the set.
2. Click the **Add to Set** button to open the Search Sets dialog box.
3. Enter the search criteria and then click the **Search** button to open the Set List dialog box.
4. Tag the set(s) for which the contacts are to be added and then click the **OK** button.

Add Contacts to a Set from the Add'l Personal Content Link

1. From the **Add'l Personal** content link, click the **New** button in the Set Membership section to open the Search Sets dialog box.
2. Enter the name of the set and then click the **Search** button to display the Set List.
3. Tag the set(s) to which the contact will be added and then click the **OK** button.

Display Set Members

From the Set List, tag a set and then click the **Set Members** content link.

Add Members to a Set

1. From the Set List, tag the sets to which members will be added.
2. Click the **Add New Members to the Tagged Sets** button to open the Search Contacts dialog box.
3. Specify the search criteria and then click the **Search** button to open the Contact List dialog box.
4. Tag the contact(s) to be added to the set and then click the **OK** button.

Validate a Set

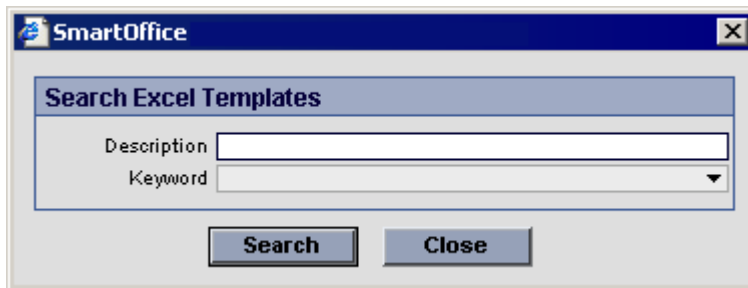
Validating a set is the process of updating the set with current data. It is an essential process when the set is created or maintained using filters. This process may result in the increase or decrease of set members.

From the Set list, tag one or more sets and then click the **Validate Tagged Sets** button to begin the validation process.

Components of Excel Templates

Search Excel Templates

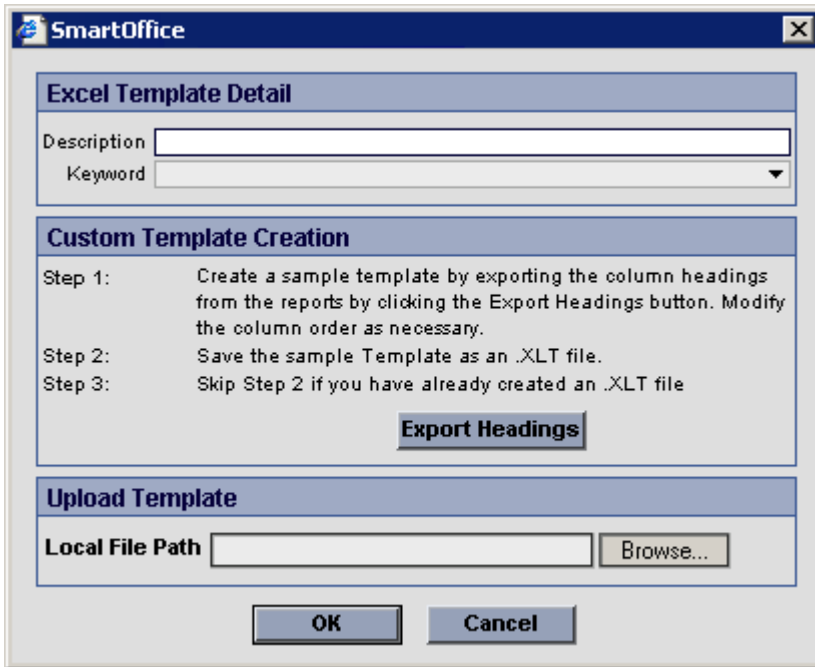
From the side menu, click **Setup** and then select **Excel Templates** from the expanded menu to open the Search Excel Templates dialog box.



- **Description:** Enter the name of the report to be located.
- **Keyword:** Records can be associated with keywords. Enter the keyword for the report to be located.

Create a Predefined Excel Template

From the Excel Template List, click the **New** button to open the Excel Template Detail dialog box.



The dialog box is titled "SmartOffice" and "Excel Template Detail". It contains three main sections: "Excel Template Detail" with input fields for "Description" and "Keyword"; "Custom Template Creation" with three numbered steps and an "Export Headings" button; and "Upload Template" with a "Local File Path" field and a "Browse..." button. At the bottom are "OK" and "Cancel" buttons.

- **Description:** Enter the name of the template report to be added.
- **Keyword:** Records can be associated with keywords. Enter the keyword for the template to be added.
- **Local File Path:** Click the **Browse** button to enter the location of the template on the local drive.

Components of Dynamic Reports

Search Dynamic Reports

From the side menu, click **Reports** and then select **Dynamic Reports** from the expanded menu to open the Search Dynamic Reports dialog box. This dialog box is used to either search for existing Dynamic Reports or to add a new Dynamic Report.



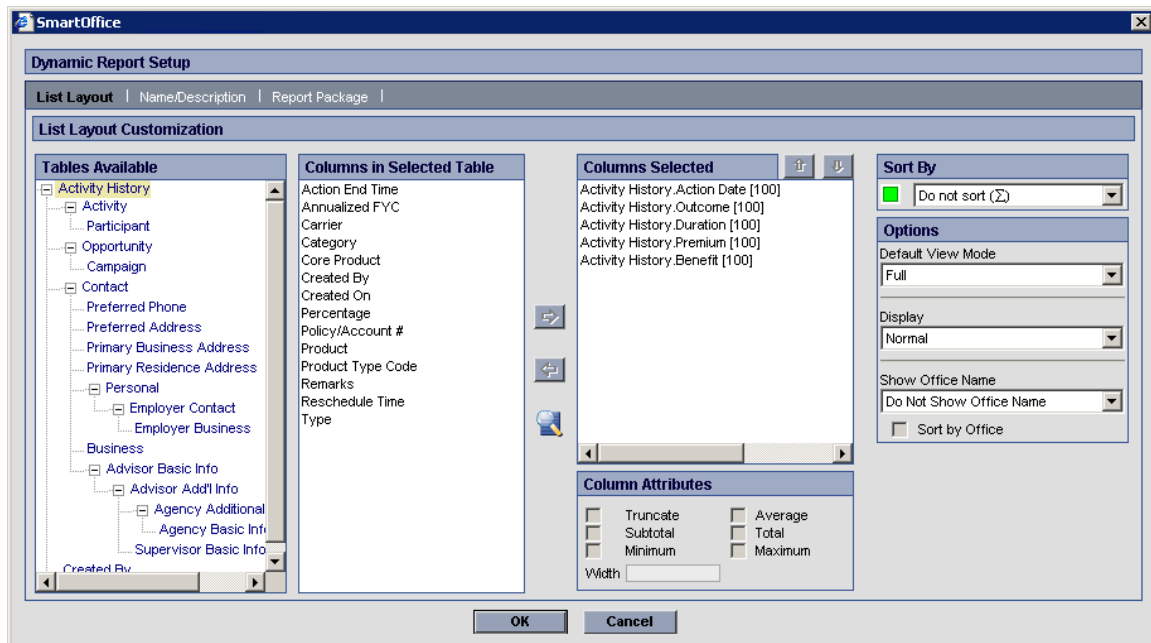
The dialog box is titled "SmartOffice" and "Search Dynamic Reports". It contains several input fields: "Report Name", "Keyword", "Report Family" (set to "All"), "Report Category" (set to "All"), and "Created By". There is also a checkbox for "Show My Favorite List". At the bottom are "Search", "New", and "Close" buttons.

- **Report Name:** Enter the name of the report to be located/created.
- **Keyword:** Records can be associated with keywords. Enter the keyword for the report to be located.
- **Report Family:** Select the appropriate category from the drop-down list.
- **Report Category:** Select the appropriate category from the drop-down list.
- **Created By:** Select a user name by clicking the **Created By** hyperlink and then choosing a User Name from the drop-down list.
- **Show My Favorite List:** Enable if the user only wants to see the Dynamic Reports listed under the My Favorites List.
- **Search Button:** Click this button to begin the search. Without entering any search criteria, click the **Search** button to display the Dynamic Report List.
- **New Button:** Click the **New** button to create a new report.

Create a New Dynamic Report

1. From the Dynamic Report List, click the **New** button to open the Category dialog box.
2. Select a report category hyperlink to open the Dynamic Report Setup dialog box.
3. Specify the column and sorting information and then click the **Name/Description** content link.
4. Enter the name, description, and filter information and then click the **Report Package** content link.
5. Enter the report package and activity information, if applicable, and then click the **OK** button.
Note: The Report Package content link is only available for the Activity Tracking, Advisor - Producer/Broker, Contact Management, and Recruitment Tracking reports.

Using the List Layout Content Link



- **Columns Width:** This section displays the different columns and their widths. To change the width of any column, select the column and then specify the width in the Column Width field. The Increment field can also be used to alter width. Click the arrow buttons to increase or decrease the width of a column.
- **Columns Available:** This section lists all of the columns available in the table specified in the Tables field. Select an available column and then click the **Right-Arrow** button to add it to the Columns Selected list.
- **Tables:** Use the drop-down list to select the table for the columns that will be added to the Dynamic Report.
- **Columns Selected:** Columns selected for the Dynamic Report are shown in the Columns Selected list box. Select a column and then click the **Left-Arrow** button to return a column to the available list. Click the **Up Arrow** and **Down Arrow** buttons to designate the column order.
- **Columns Attributes:** Columns can be calculated, limited, or abbreviated by selecting a checkbox for the selected column in this section.
- **Sort By:** Define the sort order for the report by selecting the appropriate Sort By option.
- **Options:** Any additional options that can be set based on the makeup of the report can be configured in this section.
- **Options for Showing the Office Name:** The settings in this section determine the means of displaying the Office Name and sorting method.

Using the Name/Description Content Link

- **Report Name:** Enter the name of the report.
- **Report Class:** Enter the report class, if applicable.
- **Keywords:** Enter a keyword or select a keyword from the corresponding drop-down list.
- **Excel Templates:** Enter the path of the Excel Template of the current report. See *Excel Templates* and *Components of Excel Templates* for more details.
- **Set Name:** Click the **Set Name** hyperlink to open the Search Sets dialog box and specify the set name.
- **Description:** Enter a description of the report.

- **Selected Filter List:** This section lists all filters associated with the Dynamic Report. Click the **New** button to add a filter to the report definition. If more than one filter is added, the filters are linked using the **AND** or **OR** operator. If the AND operator is used, only the records satisfying the criteria in all of the filters are added to the report. When the OR operator is used, records that satisfy the criteria of one or multiple filters are added to the report. Click the operator to change its value.
- **Specify Filter at Run-time:** Select this option to modify the filter parameters during the generation of the report.

Using the Report Package Content Link

The screenshot shows the 'Dynamic Report Setup' dialog box in SmartOffice, with the 'Report Package' tab selected. The dialog contains the following sections:

- Report Package:** A section with a title bar and a text area stating: "The options listed below can be associated with this Dynamic Report. When this report is run, the specified options will be applied to the contacts in this Dynamic Report." Below this are two hyperlinks: "Campaign Name" (with a tooltip: "Place the selected contacts into this Campaign.") and "Seminar" (with a tooltip: "Send the invitation to the selected contacts for this Seminar.>").
- Options for Creating a Call-Activity/Letter:** A section with a title bar and several options:
 - "Send Letter" (with a tooltip: "Send this letter to the selected contacts.")
 - "Create Calls" (with an unchecked checkbox)
 - "Call Script" (with a tooltip: "Associate this Call Script with the created activities.")
 - "Subject" (with an empty text input field)
- Activity Description:** A section with a title bar and a large empty text area for entering a description.

At the bottom of the dialog are "OK" and "Cancel" buttons.

- **Campaign Name:** Click the **Campaign Name** hyperlink to open the Search Campaign dialog box in order to enter the selected contacts into the campaign.
- **Seminar:** Click the **Seminar** hyperlink to open the Seminar List dialog box in order to send the invitation to the selected contacts for this seminar.
- **Send Letter:** Click the **Send Letter** hyperlink to open the Search Documents dialog box in order to send a letter to the specified contacts.
- **Create Calls:** Select this option to create a call activity.
- **Call Script:** Click the **Create Calls** option to select a Call Script to be associated with the created activity.
- **Activity Description:** Enter a reason for the call activity.

Generate a Report Package

- From the Dynamic Report List, select a report and then click the **Execute Packaged Options** button.
- From the Dynamic Report List, select a report and then click the **Run Report** button to generate the report. From the report, click the **Execute Packaged Options** button.

Link Contacts to Marketing Options

1. From the generated report, tag the applicable records and then click the **Marketing Options** button to open the Marketing Options dialog box.
2. Select the appropriate option and then click the **OK** button to open the corresponding dialog box.
3. Click the applicable hyperlink to link the contacts to the marketing option.

Copy a Dynamic Report

Instead of repeatedly modifying the same report, a report can be copied and then modified to serve a different purpose.

1. From the Dynamic Report List, tag a report and then click the **Copy** button to open the Copy Dynamic Report – New Dynamic Report Information dialog box.
2. Enter the New Report Name and New Report Description and then click the **OK** button to save the report.

Generate a Dynamic Report

From the Dynamic Report List, tag a report and then click the **Run Report** button to generate the report.

Add to Favorites List

From the Dynamic Report List, tag a report and then click the **Add to Favorite** button to save the selected report to the Favorites List.

Export a Dynamic Report Definition

From the Dynamic Report List, tag a report and then click the **Export Dynamic Report Definition** button to export the Dynamic Report Definition to be imported to a different office.

Import a Dynamic Report Definition

From the Dynamic Report List, tag a report and then click the **Import Dynamic Report Definition** button to import the Dynamic Report Definition from a different office.