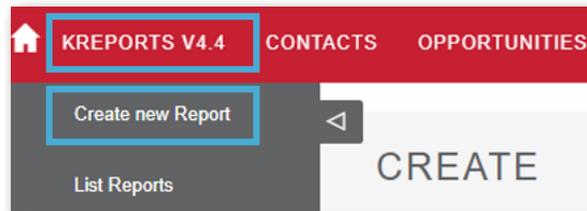


Visit support.fibrecrm.com for more info or contact your CRM Manager

Creating a Dynamic Target List - Part 1: Create a Report

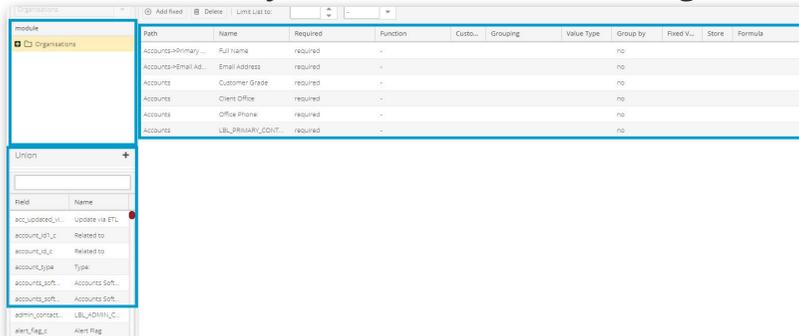
1. Navigate to the **KReports** module in the **Navigation Menu** and then select **Create New Report**.



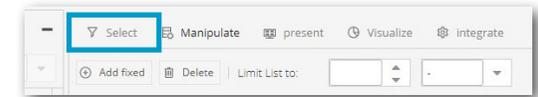
2. In the **Name Box** name your report. For this example we'll be creating a list of **Platinum Clients**.



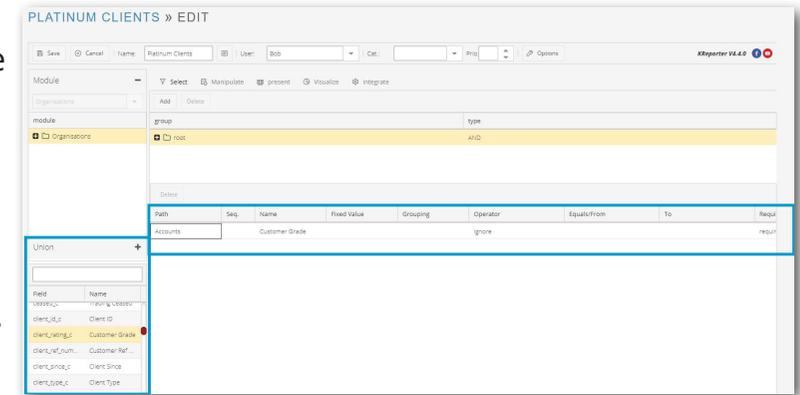
3. Select the **Module** you wish to report on. **Note: Once a Module has been selected is cannot be changed.** In the **Field box** below drag and drop the **Name** field of your selected module into the **Path Section**. You can also add other fields such as **Client Type, Address, Email, Phone**. As this report is looking at platinum clients we've added **Customer Grade** and the **Primary Contact Name** for that **Organisation**.



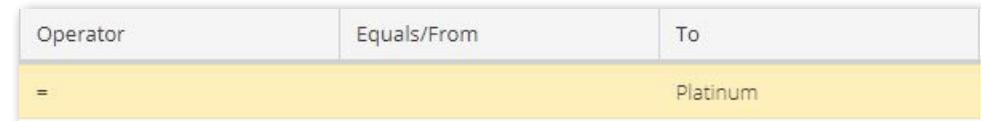
4. You now need to filter your report. To filter click the **Select** option.



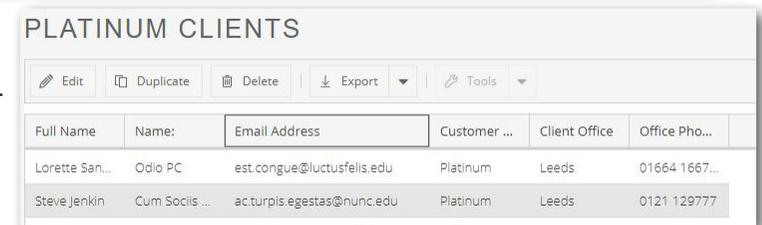
5. On the **Select** page select the fields you would like to filter and drag and drop them into the **Path Section**. For this example we'll be filter the **Customer Grade** field.



6. In the **Path** section, alter the drop down menus of the **Field** to what you want to see. For this example the **Operator** will be **=** and the **To** will be **Platinum**.



7. Once you've filtered your report click **Save**. Your report will now be generated.



8. To use the report for a **Dynamic Target List** select the **Edit** option. Then select **Integrate** and click the **Export to Target List** lightbulb. Once done Click **Save**.

