fibre CRM

HEART OF THE PRACTICE

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

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**.

🖹 Save 💿 Cancel | Name: Platinum Clients 💷 | User: 🔍 💌 | Cat.: 🔍 Prio. 🌲 | 🖉 Options

3. 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.

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		Accounts->Email Ad.	. Email Address	required					no			
		Accounts	Customer Grade	required					no			
		Accounts	Client Office	required					no			
		Accounts	Office Phone:	required					no			
		Accounts	LBL_PRIMARY_CONT	required					no			
Reld acc_updated_vt.	Name Update via ETL	•										
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accounts_soft	Accounts Soft											
admin_contact	LBL_ADMIN_C.											

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

PLATINUM CLIENTS

5. On the **Select** 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.

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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**.

= Platinum	Operator	Equals/From	То	
	. = 1		Platinum	

PLATINUM CLIENTS

		E FRANK E PAPARE F	0 10012		
Full Name	Name:	Email Address	Customer	Client Office	Office Pho
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Save	⊗ Cancel	Name:	Platinum Clients	Platinum Clients Bob				*	Cat.:
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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**.