Getting Started with Client Data System

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Introduction

Welcome to the Client Data System!

Your selection of this program will increase your marketing power and streamline your office operation. With over 70,000 current users of CDS, including more MDRT and ICFP members than any other practice management program, you are joining good company.

Over a decade of leadership in client management software has resulted in innovative functions you will not find in other programs. Our unique SmartPad, Letter Log, Sets, and powerful Dynamic Reports increase your effectiveness. You will find accessing information, entering data and navigating through the system to be smooth and efficient.

Key Learning Aids

Purpose of this Guide

The **Getting Started Guide** will provide information about some of the basic features of the Client Data System (CDS). This is not a reference manual. Our online help system provides full documentation on the functionality of the system.

Online Help

Instead of a printed reference manual, CDS comes with a sophisticated online Help system. The Help system is available whenever you are using CDS. Online Help saves you time when you need answers to your questions. If necessary, you can print help topics for future reference.

E-Z Data Web Site (www.ez-data.com)

The E-Z Data Web site offers quick, up-to-date information about CDS. From this portal, you can access the CDS Training Center to view training movies covering the five core CDS courses: *Introduction to CDS*, *The Client File*, *The CDS Calendar*, *CDS Mail Merge*, and *Filters, Sets, and Dynamic Reports*. You can also exchange information with other CDS users through the E-Z Data Forum and find help with a CDS Technical Support knowledge-base query.

Fast Classes

Fast Classes are brief tutorials that spotlight advanced tools and functionality in CDS, serving as a supplement to the Core Courses offered on the E-Z Data Web site. Every other week, a new Fast Class is published and sent through e-mail to registered CDS users. A comprehensive list of previously published Fast Classes can also be found on the E-Z Data Web site.

CDS Overview

Before installing the program, review some of the key windows and functions in CDS. The **Quick Tour of CDS** begins on page 22.

Optional Modules

The modular design of CDS allows you to add capabilities as needed. Optional CDS modules include:

The **Investment Tracking Module** for tracking investment activity and generating reports for each client.

The **Transaction Download Module** for downloading and processing financial data distributed by data providers, and automatically updating client investment records.

The **MobileMerge Module** that will allow you to take your data with you while you are away from the office. Copy the data from your CDS database onto a portable computer, then add or modify the data while you are in the field. When you return to the office, merge any data changes from the portable computer to your CDS database.

The **Commission Tracking Module** for calculating and tracking agent sales commissions.

The **Pending Case Management Module** for tracking new business from the date of submission to paid case status, and generating sales production reports.

The **WorkFlow Management Module** for developing effective marketing strategies and for activity tracking.

The **E-Z Mobile PDA Module** will open the way to true portability for your data. With your Personal Digital Assistant (PDA), you can download contact and activity records to take with you when you are away from the office.

Getting Started

Conventions in This Guide

Menu commands and buttons or icons that are clicked with your mouse, as well as keyboard actions, appear in a bold font: for example, **File** menu, **Run** command, **OK** button, **TAB** key. When information is required in a field, the characters appear in a `different font`. References to the Online Help topics appear in an underlined font: for example, Using the SmartPad.

Starting the Program

Your CDS software came with complete installation instructions so that information is not repeated in this guide. Once CDS is installed on your computer, whether on a network server or as a stand-alone system, the program runs just like any other Windows program.

Client Data System Program Group

After CDS is installed, the Client Data System program group remains on the Windows desktop until you close it or reboot the computer. This is a good time to create a shortcut for CDS on your Windows desktop.

CDS Program Icon

With the mouse pointer on the CDS Program Icon, depress and hold the right mouse button, drag the icon to the Windows desktop, and then release the mouse button. Select **Create Shortcut(s) Here** from the pop-up menu to create the shortcut on your desktop.

You can also start CDS from the Windows Program menu. Click **Start**, **Programs**, point to **Client Data System**, and then click **CDS for Windows** from the submenu.

Logging In

All users must log in to CDS before they can access client data.

For ease of learning, a sample database is provided for your use in exploring CDS. To log in to the sample database, use the Database name DEMO and the user name DEMO while following these instructions:

1. From the Taskbar, click the **Start** button, point to **Programs**, then **Client Data System**, and then click **CDS for Windows**.

2. Press the **TAB** key when the Login dialog box opens.

3. Type D in the **User Name** field, or select **DEMO** from the drop-down user list.

4. Press **ENTER** or click the **OK** button to start the login process.
   (The DEMO database does not require a password.)

The Login dialog box closes as the CDS program opens.

The first time you login to CDS after installation, several messages will be displayed while data initialization occurs. When the initialization is complete, CDS is ready for use.

Setting Up CDS Features

Printer Setup

CDS uses the Windows Print Setup to control printing operations. To see or change the list of printer options while using CDS, use the **Print Setup** command on the **File** menu.

FaxMan (Fax Server)

FaxMan is an add-on program that allows you to send faxes directly from the CDS program. If you have a compatible modem and printer configuration, FaxMan is installed automatically when the CDS program is installed. However, due to the wide variety of modems and printers that are available, FaxMan may not function with all system configurations.

Automatic Dialing Setup

You can dial telephone numbers from Contact and Business records in CDS databases through your computer's modem.

In CDS, click **Database** and select **Modify Current User's Profile** to open the user profile setup. Click the **Misc. Information** tab in the user profile to see or change the **Modem/Phone Information** settings.

Refer to the Help system topic <u>About the User Profile</u> for additional information.

Protecting Your Data

You can help prevent the total loss of your data by backing up your valuable data nightly. A nightly backup is the best way to keep your data loss to a minimum in the event of an unrecoverable hard drive crash. Less frequent backups equate to more significant losses, while no backup could mean the total loss of your data.

CDS system and data files for stand-alone installations are located under Program Files in the CDSWin directory by default. For network installations, CDS system and data files are located in the CDSWin.svr directory on your server.

There are many backup systems available on the market today. Use of tape backups or recordable/rewritable CD-ROM systems (CD-R/CDRW) provide the highest capacity and are the most reliable. Spanning your backup across several diskettes is not recommended because of the increased risk of losing your entire backup due to the failure of a single disk in the set.

Rotate your backup tapes or CD-R/CDRWs so that you have multiple copies of your CDS system and data files in the event of defective media. At least one current backup should be kept off-site in case of fire or other disaster.

Getting Acquainted with the Desktop
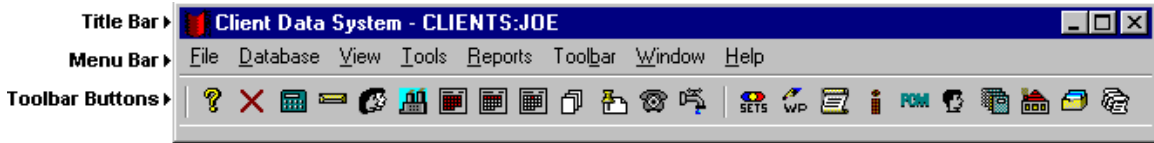
The first window that appears after logging in to the program is the CDS desktop. The desktop is comprised of various elements:

Title Bar – The title bar displays the program name, the name of the database that is open, and the name or the user that is logged in.

Menu Bar – The menus on the Menu Bar contain the complete set of commands and utilities that are available to the user, based on the area of the program that is open. For example, from the CDS desktop, the user can access Sets, Filters, and Images from the **View** menu. When a Contact record is open, additional commands and options appear on the **View** menu.

Toolbar Buttons – The toolbar buttons are used to access the most commonly used features that are available on the various menus.

Status Bar (not shown) – Indicator buttons for the active Contact are located in the Status Bar at the bottom of the CDS desktop. Indicator buttons are shortcuts to additional information about the Contact, such as policies, investments, and scheduled activities.

Field Help is also displayed in the Status Bar. Each field of a database record is labeled according to use of the field. While the use of some fields, such as **Last Name** or **Birth Date**, is obvious, brief reminders on the status bar describe the function of less obvious fields when they are selected. When you move to the next field, the message changes to remind you of the type of information that belongs in that field. Field Help messages can be changed to suit individual needs.

CDS Menus and Toolbar Buttons

The desktop menus and toolbar buttons access all CDS functions. The most frequently used menu commands are available by clicking the toolbar buttons. When you point to a button, a ToolTip describe the button's functionality appears.

Some functions are available in all windows, while other functions are only available when certain records or list windows are open.

Toolbar buttons that are always available:
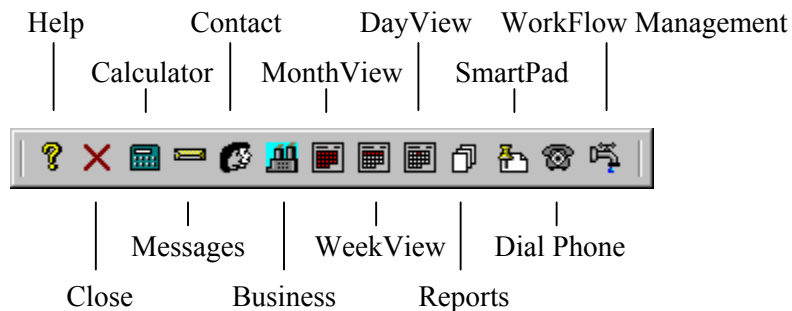
Toolbar buttons that are common in many areas of the program:

```
        Find            Save      Activity Log      Images
                Next          Modify     Investments
```
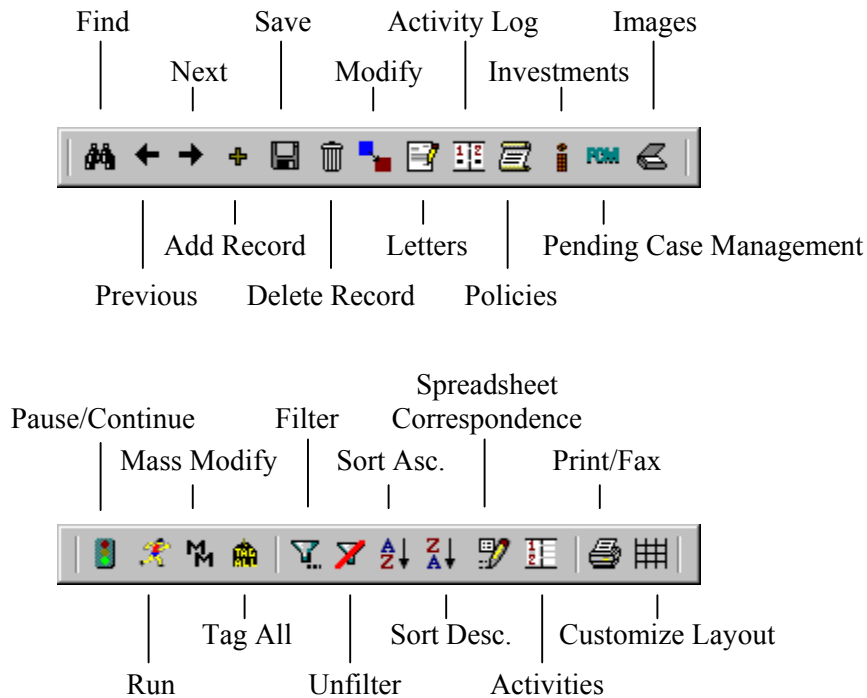


```
            Add Record       Letters      Pending Case Management
       Previous    Delete Record    Policies
```

```
                                        Spreadsheet
        Pause/Continue      Filter    Correspondence
            Mass Modify      Sort Asc.          Print/Fax
```



```
            Tag All          Sort Desc.   Customize Layout
        Run              Unfilter        Activities
```

For more information, see the Online Help topic <u>Customizing CDS</u>.

Online Help

CDS provides online help in lieu of a printed reference manual. Knowing how to access and use the online help is particularly important. If you are already familiar with using online help systems for Windows programs, you can skip this section and move on to Creating a New Database on page 8.

Finding Help

Online Help is available from anywhere in the program. Open the main CDS Help, Glossary, or Help for specific modules by selecting one of these items from the CDS **Help** menu. For general information about how to use the Windows Help system, select **Using Help** from the CDS **Help** menu. Context-sensitive help is available by clicking the yellow question mark icon on the toolbar from anywhere in the program. The **Help** buttons in dialog boxes open help topics about the dialog box that you are using.
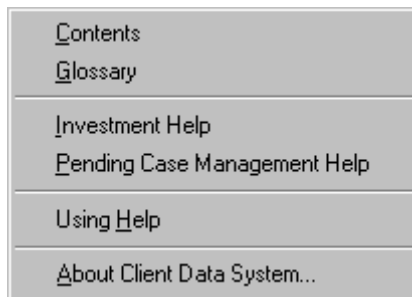
Jumps and Pop-ups

Glossary terms in the Help system are green with a dotted underline. When you click on a glossary term, a pop-up window opens with a definition or additional references for the term. Click again to close the window.

Words or phrases in green with a solid underline indicate that there is a separate topic for the word or phrase. Click the word or phrase to jump to the other topic. Click the **Back** button to return to the previous topic.

Many of the images in the Help system have imbedded information about the fields and buttons that appear in the image. Whenever the mouse pointer changes to a pointing hand over an image, you can click on that area of the image to open a pop-up window for additional information.

Using the Index and Search Tabs

Key words and phrases are fully indexed in the Help system. Select the **Index** tab above the table of contents and start typing the word or phrase that you need help with. As you type, matching words or phrases are automatically located in the index. Press ENTER as soon as you see the word or phrase that you are looking for to display the help topic.

The Help system also has a full-text search capability for locating all occurrences of an exact word or phrase. Select the **Search** tab above the table of contents and start typing the word or phrase that you want to find in the first field. The search narrows as you type and displays the matching words or phrases in the second field. Any topics that contain the word or phrase that you are searching for will be displayed in the third field. Click the topic title in the third field to open the help topic.

Printing Help Topics

If you have a local or network printer attached to your computer, you can print help topics for future reference. Locate the help topic that you want to print and then click the **Print** button on the toolbar.

Creating a New Database

The CDS program comes with a demonstration database named DEMO. This database contains fictitious records for Contacts, Businesses, Policies, etc. to help illustrate the various features of the program. Use the DEMO database to practice using the program and to follow the examples in this *Getting Started Guide*. When you are ready, create your own database by following the steps below.

1. Start the CDS program and login to the DEMO database as the DEMO user.

2. From the **Database** menu, select **Create New Database**.

3. In the Create Database dialog box, type in the name for your new database (up to eight characters, no spaces or special characters).
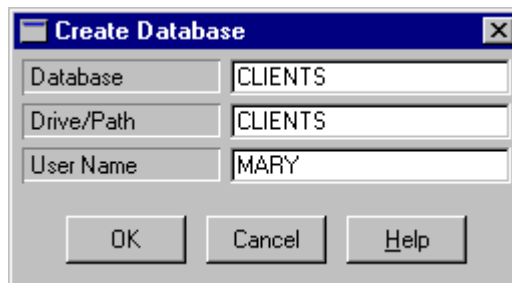
4. Press the TAB key to move to the Drive/Path field.

   Notice that the database name automatically becomes the name for the Path. In our example, the new database will be located in C:\Program Files\CDSWin\Clients.

   If you are using the network version of CDS, the database will be stored on the network server. Please consult your network installation instructions for further details.

5. Press the TAB key to move to the User Name field. To create your own CDS user name, type in your name (up to eight characters, no spaces or special characters).

6. Click the **OK** button to close the dialog box and create the new database.

7. When CDS is finished creating the database, click the **OK** button to log in to and use the new database.

CDS maintains a User Profile of system preferences for each user's login name. The next time you start CDS, you will have the choice of logging in to the DEMO database, or the new database.

For more information, see the Online Help topic: About the User Profile.

Logging into Other Databases

You can close one database and log in to another at any time. For example, you may want to log in to the DEMO database for additional practice and to follow the exercises in this guide.

1. Save and close any open work, such as Contact records, to return to the CDS desktop.

2. From the **Database** menu, select **Login to New Database/User**.

3. When the Login dialog box opens, select the DEMO database and the DEMO user name and then click the **OK** button to open the practice database.

Keyboard Shortcuts

The shortcut keys for CDS commands are listed to the right of the respective commands on the menus. In addition to command shortcuts, many users find that shortcut key-combinations for simple navigation are quick and efficient. The keys listed below are used to navigate through the program from the keyboard.

TAB (SHIFT+TAB)	Moves the cursor to the next field for data entry. (To move to the previous field, press SHIFT+TAB.)
ALT+RIGHT ARROW	In a tabbed window, such as the Contact window, this key combination opens a horizontal tab to the right of the current tab.
ALT+LEFT ARROW	In a tabbed window, such as the Contact window, this key combination opens a horizontal tab to the left of the current tab.
ALT+DOWN ARROW	In a tabbed window, such as the Policy window, this key combination opens a vertical tab below the current tab.
ALT+UP ARROW	In a tabbed window, such as the Policy window, this key combination opens a vertical tab above the current tab.

CTRL+TAB	Use this key combination to move from one active window to another. For example, when you have multiple windows open, each time you press CTRL+TAB another open window becomes the active window.
CTRL+F4	Use this key combination to close the active window.
F2	Many fields have drop-down lists of choices. The F2 key opens the Choice Options dialog box to add or delete choices.
F3	The F3 key opens the Dialing dialog box from open Contact or Business records for dialing phone numbers through your computer's modem.
F7	The F7 key opens the SmartPad list window for the active Contact or Business record.

The Basics

The exercises in this guide are based on the DEMO database that is installed with the CDS program. This database contains fictitious records for Contacts, Businesses, Policies, etc. to help illustrate the various features of the program. Use the DEMO database to practice using the program and to follow the examples in this guide.

Opening the Contact Window

From the Desktop:

1. From the **File** menu, select **Contact** or select the **Contact** button on the toolbar to open the Find Contact Information dialog box.

    (This dialog box is used to select the Contact records that you want to open. Detailed information about using the Find Contact dialog box starts on page 12.)

2. For this exercise, click the **OK** button to list all of the Contact records in the database.

3. Double-click a record in the **Summary** tab list to open the **Personal** tab for the Contact.

For Online information, see the Help topics: <u>Overview of the Contact Window</u> and <u>Finding Records</u>.

Adding Contact Records

From the Desktop:

1. From the **File** menu, select **Contact** or select the **Contact** button on the toolbar to open the Find Contact Information dialog box.

2. Click the **OK** button in the Find Contact Information dialog box to list all of the Contact records in the database.

3. From the **Record** menu, click the **Add** button or click the **Add** button on the toolbar of the Contact **Summary** tab.

4. Begin entering information about the Contact when the blank Contact record opens. As you enter information, the first letter of each name or word in a field is automatically capitalized for your convenience. Use the **TAB** key or the mouse to move from one field to the next. Some fields have drop-down lists of choices. These choice lists help you maintain information consistency and can be modified to suit your needs.

5. After adding information about the Contact, click the **Save** button. As the record is being saved, you will be prompted to assign the Contact to at least one Agent/Producer from a list that will open automatically. Select an Agent/Producer from the list and then click the **OK** button to finish saving the new record.

New Contact records must be saved before additional information can be added on other tabs. The other tabs become available for data entry after saving the record.

The Contact name will appear in the title bar of the record window after saving the record. While working on a Contact record, all functions and data entry are automatically linked to that record. For example, if Joe Ackerman's contact record is open when you click the SmartPad button, all of the SmartPad entries for Joe Ackerman will be displayed. Click the **Policies** button and all of Joe Ackerman's policies will be displayed.

For more information, see the Online Help topic: <u>Adding a Contact Record</u>.

Finding Contact Records

There are several methods for finding specific contact records in the database. If you do not have records in your new database, login to the DEMO database to follow the exercises below.

From the Desktop

1. From the **File** menu, select **Contact** or select the **Contact** button on the toolbar to open the Find Contact Information dialog box.

2. When the Find Contact Information dialog box opens, enter a last name, a business name, or some other unique information about the Contact record you are looking for, and then click the **OK** button.

   Any records that match your search criteria are listed on the **Summary** tab of the Contact window. If there is no match for your search criteria, you will be prompted to add a new Contact record.

3. To view the pertinent details of any record listed as the result of the search, select the record on the list and then click any other adjacent tab.

For more information, see the Online Help topic: Finding Contact Records.

Browsing for a Contact Record

When you have many Contacts with the same last name, you can browse for the exact record that you are looking for without closing the current Contact record first.

1. Search for Contact records with a common last name using the method described above.

2. Select one of the records from the **Summary** tab that were found during the search and then click the **Personal** tab.

3. Click the next or previous button (right and left arrow on the toolbar) to open the records that appear alphabetically before or after the current record.

Finding Other Contact Records

When the Contact window is already open, you can find other Contact records that were not on the Summary tab, or that are out of alphabetical browsing order, without closing the active Contact record.

1. Click the **Find** button (binoculars) to open the Find Contact Information dialog box.

2. Enter the last name of the Contact that you are looking for in the Find Contact Information dialog box and then click the **OK** button.

   If you are not sure about the spelling of a Contact's last name, enter the first letter or the first few letters of the name to locate all records that begin with the letters that you enter. This method of searching for partial information will work in the other fields also.

3. Records that match the search criteria will be displayed on the **Summary** tab of the Contact window. Select a record on the summary list and then click the **Personal** tab to view detailed information about the Contact.

Key Relations

The Key Relations tab of Contact and Business records stores information about important relationships. Relationships include the spouse, sons, daughters, and business associates. When a relationship involves other Contacts or Businesses that have records in your database, you can link the records together and define the relationship. Use the DEMO database if you want to try this out without modifying your own data.

Linking Contact Records:

1. Open the first of two Contact records that you want to link together.

2. Use ALT+RIGHT ARROW to move to the **Key Relations** tab, or click on the tab.

3. Under **Key Relations Summary**, click the **Add Record** button, or choose **Add Key Relation** from the **Record** menu.
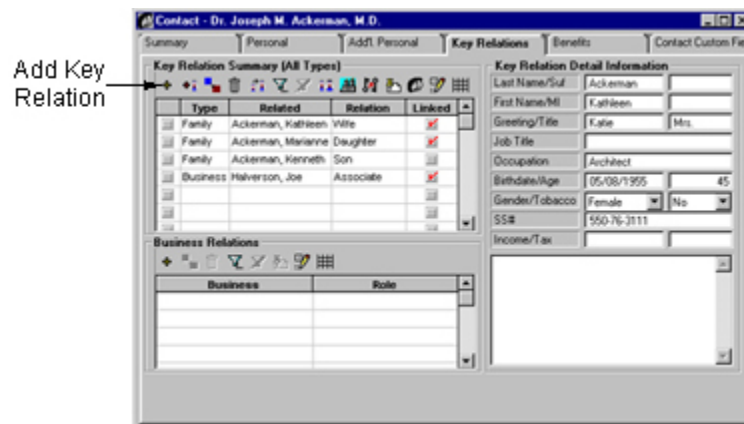
4. In the Find Contact Information dialog box, type the first letter of the other Contact's last name in the Last Name field, then click the **OK** button.

5. In the list window showing all contact records with last names beginning with the letter you typed, double-click the name of the contact you want to link.

6. In the Define Relationship dialog box, select the relationship type and the specific relationship for each Contact from the drop-down lists, and then click the **OK** button.

   This defines the relationship for the two contacts. CDS has a default list of key relationship descriptions you can use, or you can enter your own by clicking on the **Relationships** button.

7. On the **Key Relations** tab, select the linked Contact's name and then click on the **Show Contact** button on the toolbar to open the second Contact's record.

When the second Contact's record opens, you will find the first Contact's name listed on the Key Relations tab. Follow the procedure in Step 7 to re-open the original Contact record.

For more information, see the Online Help topic Contact (Client) Records.

Dependents

You can store brief information about family members, such as dependent children, in the **Key Relations** tab of the Contact record. The dependent record appears on the right side of the Key Relations tab. There is no Contact record (or Contact record functionality) for a dependent record.

1. Open a Contact record and click on the **Key Relations** tab.

2. Under **Key Relations Summary**, click the Add Dependent button (to the right of the **Add Record** button).

3. Type the Last Name and First Name of the dependent in the Find Dependent Record dialog box, and then click the **OK** button.

4. Click the **Yes** button when the CDS program indicates that the record for the name entered does not exist and prompts you to add it.

5. In the Quick Add/Modify dialog box, fill in the fields as needed and then click the **OK** button.

6. When the Define Relationship dialog box opens, select **Relation Types** from the drop-down lists and then click the **OK** button to save the Dependent record.

For more information, see the Online Help sub topic <u>Working with Dependent Information</u> under <u>Contact (Client) Records</u>.

Additional Contact Record Tabs

- **Add'l. Personal** tab stores miscellaneous information, dates, set membership, and record assignments.

- **Benefits** tab displays the Contact's insurance and investment totals in read-only fields.

- **Contact Custom Fields** tab contains numerous fields that can be customized by the user for virtually any type of data storage and retrieval need.

Storing Policy Records

You can create policy, product, vendor, and agent records in CDS. The DEMO database has completed examples of these types of records.

Opening the Policy Window

1. Open Joseph Ackerman's Contact record.

2. Click the **Policies** button on the toolbar to display a summary list of Joseph Ackerman's policies.

3. Open the **View** menu to change the options that control the types of policies that are displayed or to display policies by a specific role.

Navigating in the Policy Window

The Policy window has tabs across the top to organize information about a specific policy. The tabs along the left side organize the policies by type.

1. Double-click any policy that is listed on the **Summary** tab to view the details of that policy on the **Basic Information** tab.

> Use the "three dimensional" field name buttons to access data stored elsewhere in CDS. For example, click on the **Carrier** field name button to

	open the Insurance Vendor record. Use the field buttons when adding new records to help eliminate typographical errors, and to maintain uniform data entry.

2. Click the **PlanName/Code** field button. The information that appears in the pop-up window is from a related table in the database. Click the **Cancel** button to close the window without making any changes.

3. Click the **Benefits** tab to display details of coverage and riders. Data entry and field buttons work the same way in this tab as they do in nearly all of the CDS windows.

4. The **Misc. Information** tab stores policy-related dates, sub account information, and custom fields. The **Transaction** tab stores transaction histories and summaries for the types of policies where transactions occur.

5. Review the different types of policy information stored by clicking a vertical tab and then repeating the previous steps.

For more information, see the Online Help sub topic <u>Navigating the Policies Windows</u> under <u>Policy Records</u>.

Adding a Policy for a Contact

1. Open the Contact record and click the **Policies** button to open the Policies window.

2. Select the vertical tab for the type of policy that you want to add. For example, click the **Life** tab to add that type of policy.

3. From the **Record** menu, select **Add** or click the **Add Record** button.

4. In the **Basic Information** tab for the policy, begin entering data in the fields.

5. If the Carrier field is blank, click the **Carrier** field button to open the Find Insurance Vendor dialog box to locate the Insurance Vendor to use for the type of policy that is being added.

6. The Plan Name/Code field has a drop-down list of Insurance Products for the selected Carrier. Click the **Plan Name/Code** button if you need to add a new product.

7. The Primary Agent field has a drop-down list for Agent/Producer selection. Click the **Agent** label to modify or add agent information to the database.

8. Click the **Proposals** field button to link a Sales Illustration record to the policy. This button becomes active after the new policy record has been saved.

9. When you click the **Save** button, you will be prompted to enter the Interested Parties (e.g., Payor, Beneficiary, etc.), and with the option to add other agents (i.e., split case). After saving the record for the first time, you can enter Riders on the **Benefits** tab as needed.

For more information, see the Online Help sub topic <u>Working with Policy Records</u> under <u>Policy Records</u>.

Telephoning a Contact

Before you use the automatic dialing feature, make sure you have set up your computer modem and have the correct settings in your User Profile (see Automatic Dialing Setup on page 5).

1. Open Joseph Ackerman's contact record.

2. Click the **Dial Phone** button on the toolbar or press F3 on your keyboard to open the Dialing dialog box. This dialog box lists all of the telephone numbers stored in the contact record.

3. If this were an actual Contact that you wanted to call, you would click the **Dial** button to have CDS dial the selected number through your modem.

4. Since Joe Ackerman is a fictitious Contact, make sure the **Manual Dial** box is checked and then click the **Dial** button. When the timer starts, **Stop** and **Pause** buttons appear on the right side of the status bar.

5. Click the **Stop** button to open the Time Log Information dialog box. Use this dialog box to add notes or other pertinent information about the call and then click the **OK** button to save the Time Log Information.

CDS maintains a log of your timed calls and activities. Select **Time Log Information** from the **Tools** menu to view these records. Time Log entries also appear in the Contact's SmartPad.

For more information, see the Online Help sub topic <u>Contact Phone Numbers</u> under <u>Contact (Client) Records</u>.

Scheduling Appointments

During a conversation with a Contact, you may decide that you need to schedule an appointment to review a proposed policy or discuss other business.

1. Open Joe Ackerman's contact record and then click the **WeekView** button on the toolbar. You can also schedule appointments from DayView, MonthView, and the Contact's Activity Log.

2. Select the year, month, and day for the appointment from the WeekView calendar. If the calendar is not in view, click the **WeekView** button again to change the view.

3. Double-click one of the rows under the date selected to open a DayView calendar window.

4. Select a row adjacent to the time when you want to schedule the appointment and then click the **OK** button to open the Activity Detail dialog box.

5. Use the TAB key to move from one field to the next (or click in a field) if you need to change or add information. Click the **Options** button to link the activity to an existing policy (or investment).

6. When you are finished adding or changing information for the activity, click the **OK** button to close the Activity Detail dialog box. For this exercise, make sure **Appointment** is the activity Type.

7. When the Activity Detail dialog box closes, you will be prompted to send a confirmation letter about the scheduled appointment. Click the **Yes** button and then continue with the next exercise.

For more information, see the Online Help topics under <u>Time and Calendar Management</u>.

Sending a Confirmation Letter

There are two ways to create and send appointment confirmation letters:

Automatic Confirmation Letters

1. After scheduling an Appointment-type activity, as in the previous exercise, CDS automatically prompts you to send a confirmation letter. Click the **Yes** button when prompted to send a confirmation letter to open the Print/Fax Form Letter dialog box.

2. Select the Appointment Confirmation letter from the list of Form Letters (the DEMO database has sample confirmation letters) and then click the **Print** button.

3. The confirmation letter opens in a word processor and all merge codes automatically expand. Confirm the Contact information and the content of the letter and then click the **Close** button.

4. When the word processor closes, you will be prompted to send the letter to the printer. Click the **Yes** button to send the letter to the printer or the **No** button to cancel the creation of the confirmation letter.

Creating Confirmation Letters Manually

1. Open Joe Ackerman's contact record and then click the **Letters** button to open the Letters dialog box.

2. Click **Letter Log** in the Letters dialog box to open the list of letters that have been sent to Joe.

3. Click the **Add** button to open the default word processor. E-Z Editor is used in this exercise.

4. On the **File** menu, point to **Import** and then click **Form Letter**.

5. In the Find Form Letter dialog box, click the **OK** button to list all form letters that are available for import.

6. Locate and select the Appointment Confirmation letter in the Description column and then click the **OK, Select** button (green check mark) on the toolbar to open the letter. You can also double-click on the name of the letter to open it.

   The Appointment Confirmation letter contains some basic Merge Codes (symbols and words that merge information from database fields). You can insert additional codes by using the Merge Code Browser. This feature is available from the **Tools** menu in E-Z Editor or the **Insert** menu if you are using Microsoft Word with CDS.

   Locate the Merge Code **&Date** at the top of the letter. When the letter is printed, the current date will be inserted in place of this Merge Code. Other Merge Codes, such as **&Name** and **&Address**, will be replaced by the data stored in the respective database fields when the letter is printed. You can also change the text.

7. To expand the merge codes, from the **Tools** menu, select **Expand Merge Codes** (E-Z Editor and Microsoft Word). When prompted, select the type of address to use to complete the process.

   If this were an actual Contact, the confirmation letter could now be printed and sent to the Contact. When you save this letter, the letter is stored in the Contact's Letter Log exactly how it was printed, without changing the format or text of the form letter that was imported in Step 6.

   > To print the Appointment Confirmation letter without making any changes, select **Form Letters** from the **Reports** menu. This method starts the letter printing process without opening the letter in a word processor.

For more information, see the Online Help sub topic Form Letters and Mail Merge under Word Processing.

SmartPad Notes

The SmartPad is a collection of notes and events associated with a Contact. SmartPad entries occur automatically for a variety of actions, such as scheduled appointments, notes on telephone conversations, change of address, and policies and investments added. The settings in your User

Profile control the types of events that are automatically recorded in the SmartPad. You can also make manual entries in the SmartPad.

When the SmartPad window is open, you can apply a Filter that will only display SmartPad entries of a certain Type or Priority.

1. Open Joe Ackerman's Contact record.

2. Click the **SmartPad** button on the toolbar, or press F7 on your computer keyboard.

3. Scroll to the end of the list to see the timed telephone session, the appointment you made, and the confirmation letter you sent (if you completed the exercises from the previous sections).

4. In the Type column, locate a SmartPad entry with **Activity** as the type. Double-click this SmartPad entry to open the Activity Detail box for the entry. When you double-click a SmartPad entry for a Policy, the Policies window opens to the Basic Information tab for the linked policy. When you double-click a SmartPad entry for a Letter, a copy of the letter opens.

For more information, see the Online Help topics under SmartPad: The Intelligent Notepad.

Consolidating SmartPad Notes

You can consolidate the SmartPad entries of family members and other Contacts into one SmartPad list.

1. Open the Contact record for Kathleen Ackerman (Joe's wife) and then open her SmartPad (as described above).

2. Take note of the number in the SmartPad title bar that indicates the number of entries displayed.

3. Click the **Consolidation by Household** button, or select **Household SmartPad** from the **Tools** menu.

    The SmartPad list is redisplayed with the SmartPad entries for all members of the Ackerman household. Notice the number in the SmartPad title bar has increased to indicate that more entries have been displayed.

    > SmartPad entries appear in chronological order so that you can quickly see the sequence of events for a family or key account.

4. Click the **SmartPad** button to redisplay only Kathleen Ackerman's SmartPad entries.

To limit the list of family members, click the **Consolidated SmartPad** button to open the Consolidated SmartPad dialog box. Select the family members on the list that you want to display SmartPad entries for and then click the **OK** button. You can also add other Contacts to the Selected Contact List by using the **Find**, **Filter** and **Set** buttons.

Database Reporting

CDS supports several powerful reporting features. The innovative Dynamic Reports function can be used to create report setups that are based on the records you specify and in the format you define. For example, create a report that will include all Contacts with birthdays occurring in the next 30 days, sorted by month and day of birth. With the click of a button, run the report to display the Contacts that fit the reporting criteria, and then double-click any of the records to dynamically access the underlying Contact record.

Opening the Reports List

Close any windows that you may have opened in other exercises. You can use **Close All** on the **Windows** menu to conveniently close all open windows.

1. On the toolbar, click the **Reports** button (or press CTRL+Y) to open the Find Report Selection dialog box.

2. Click the **OK** button in the Find Report Selection dialog box to list all available reports.

The Category column of the Report Selection window indicates the primary table that is used in the report. For example, **Activity** in the Category column means that the Activity table is the primary table. Like other list windows in the program, you can sort or filter the list, change the arrangement of the columns, etc.

When you click the **Add** button, you will be guided through the steps required to add your own Dynamic Report by the Report Definition Wizard. Please review the CBT on the companion CD for a complete demonstration of this multi-step process.

Additional information is also available in the Online Help sub topic Creating a Dynamic Report under Database Reporting.

Running Reports

1. Open the Dynamic Reports Selection list and locate the "All Married Clients" report in the Description column.

2. Select the **All Married Clients** report on the list and then click the **Run** button.

3. When the Select Agent(s)/Producer(s) dialog box opens, click the **Select All** button and then click the **OK** button.

The results of the report will appear in a list window. You can print the report in spreadsheet format (as it appears on-screen) or open a Contact record by double-clicking the Contact's name on the list.

For more information, see the Online Help sub topic Running Reports under Database Reporting.

Sets of Records

Sets are used to group records together that have something in common. For example, you can create a Set for Contacts who earn more than $100,000 per year; or a Set for Contacts who are physicians.

When you open a Set of records, the Set members are displayed in a list window. Add to and remove records from the set with filters or by manual selection.

There are several examples of Sets in the DEMO database. As you add client and prospect records to CDS, you can group the records into new or existing Sets for use with other program features.

1. Close any CDS windows that were opened during previous exercises. Click the **Sets** button on the toolbar, or click the **View** menu and select **Sets**.

2. Click the **OK** button in the Find Sets dialog box to open the Set List.

    Each Set has a Name, Description, and other pertinent details about the Set. You can create new Sets or modify existing Sets. Use the **Validate** command on the **Record** menu to make sure a Set is up-to-date before using it for other tasks.

3. Double-click the **MD Set** to open it.

   The MD Set Members window lists all of the Contacts who are designated as a Physician in the Occupation field of their records. You can double-click on any name in the list to open the underlying Contact record. Contact records can be added to a Set automatically during the data entry process or you can add records manually to a Set at any time.

For more information, see the Online Help sub topic Using Sets under Filters and Sets.

Changing CDS Features

List windows use the default column headings and widths to display records and other data. You can change the width of columns in a list window with the mouse, or you can use the Column Definition dialog box to resize, add, remove, and change the order of columns.

Resizing Columns

1. Open the MD Set Members list if it was closed after the previous exercise.

2. Move the mouse pointer over one of the column boundary lines on either side of a column heading.
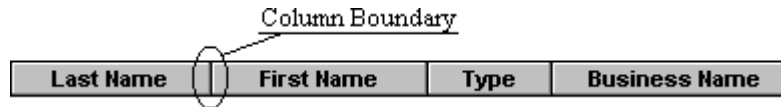
3. When the mouse pointer changes from an arrow to a split line (↔), press and hold the mouse button while dragging the boundary line in either direction to change the column width. Release the mouse button when the column is set to the preferred width.

Customizing the Layout

Use the Column Definition dialog box when you want to add, remove, or rearrange the available columns, in addition to resizing the columns to your preference.

1. From the list window toolbar, click the **Customize Layout** button to open the Column Definition dialog box.

2. Locate and select **Title** in the Columns Available list.

3. Click the right arrow button to move **Title** to the end of the Columns Selected list. You can also double-click **Title** to move it to the Columns Selected list.

   To change the order of the Columns Selected: use the mouse to point to the column name that you want to move, press and hold the mouse button while dragging the column name to a new position on the list, and then release the mouse button.

4. Locate and select **First Name** in the Columns Selected list.

5. Click the left arrow button to move **First Name** to the Columns Available list. You can also use the double-click method to remove columns.

6. The selected columns appear in list-order along the top of the Column Definition dialog box. Use the resizing method described previously to change the column widths as needed.

7. When you click the **OK** button to save the changes, a dialog box will prompt you with the option to save the changes for **All Users** or **For the current user only** (default option). Click the **Save** button after selecting an option to finish saving the changes.

For more information, see the Online Help sub topic Using List Windows under CDS Basics.

Creating Field Choices

The data in many Contact and Business record fields is unique to each person or business. Some fields, however, can be used for data that is common to many or all Contact and Business records. With common data in certain fields, efficient sorting, grouping, and searching functions can be performed. The key to efficient sorting, grouping, or searching functions is uniform data entry.

To help you maintain the uniformity of data, most data fields have **Choice Options** lists that can be customized with any preferred terms to use in the field. For example, you could add the term "Lawyer" to the Choice Options list of the Occupation field to help you avoid using "Attorney" or "Counselor" to identify this type of legal professional. Using consistent terms in this case would eliminate the need to search the database multiple times to find all Contacts who are basically in the same profession.

Joseph Ackerman's occupation is listed as *Physician/Surgeon*. To avoid using inconsistent terms for other Contacts in this profession, add *Physician/Surgeon* to the Choice Options list.

1. Open the **Personal** tab of Joseph Ackerman's Contact record and then TAB to the **Occupation** field.

2. Right-click in the **Occupation** field to open the context menu.

3. Select **Choice** from the context menu to open the Choice Options dialog box.

4. Click the **Add** button to use the Choice Options dialog box in Add Mode.

5. Type `Physician/Surgeon` in the Add Mode field and then click the **Save** button.

6. Click the **Add** button to add other occupations or click the **Close** button if you are finished.

When you close the Choice Options dialog box after adding choices, a drop-down list will be created for the field. Make selections from the drop-down list in the field to maintain consistency when adding new Contacts.

For more information, see the Online Help sub topic <u>Field Choices</u> under <u>Customizing CDS</u>.

Quick Tour of CDS

Contact Management

Track clients using specially designed Contact or Business record formats. Select a record on the **Summary** tab and then click any other tab to view the Contact information.

The **Personal** information tab stores details about an individual Contact.

Store additional addresses for each Contact or Business record under the **Add'l Personal** information tab.

Contact - Dr. Joseph M. Ackerman, M.D.

Summary | Personal | Add'l. Personal | **Key Relations** | Benefits | Contact Custom Fi

Key Relation Summary (All Types)

	Type	Related	Relation	Linked
☐	Family	Ackerman, Kathleen	Wife	☑
☐	Family	Ackerman, Marianne	Daughter	☑
☐	Family	Ackerman, Kenneth	Son	☐
☐	Family	Zorm, Bob		☐
☐	Business	Halverson, Joe	Associate	☑
☐				☐

Business Relations

Business	Role

Key Relation Detail Information

Last Name/Suf	Ackerman	
First Name/MI	Kathleen	
Greeting/Title	Katie	Mrs.
Job Title		
Occupation	Architect	
Birthdate/Age	05/08/1955	45
Gender/Tobacco	Female	No
SS#	550-76-3111	
Income/Tax		

Use the **Key Relations** tab to link related Contact or Business records, by any relationship category, for instant access and consolidated reporting.

Contact - Dr. Joseph M. Ackerman, M.D.

Summary | Personal | Add'l. Personal | Key Relations | **Benefits** | Contact Custom Fi

Insurance Totals

Insurance Type	Benefits	Ann Premium
Term Life	1,000,000	1,450
Permanent Life		4,000
Universal Life	1,000,000	16,450
Total Life	2,000,000	21,900
Disability	10,000	6,820
Medical		1,820
Annuity	50,000	50,000
LTC		
Home Owner		
Auto		
Umbrella		
Other		
Total		80,540
Total CSV		78,259

Investment Totals

Investment Type	Cost	Current Value
Mutual Funds	81,709	214,145
Cash/Time Deposits	45,000	51,879
Stocks	73,270	
Bonds	59,450	64,151
Fixed Annuity	25,000	25,240
Variable Annuity	39,500	59,052
DPP		
Unit Trusts	15,000	1,004,109
Notes Receivable		
Real Estate	100,000	150,000
Personal Property	80,000	80,000
Miscellaneous	5,000	5,000
Total	523,929	1,653,576

The **Benefits** tab provides a read-only summary of the Contact's insurance and investment benefits.

Over 40 Custom Fields are available for tracking information that is unique to your business.

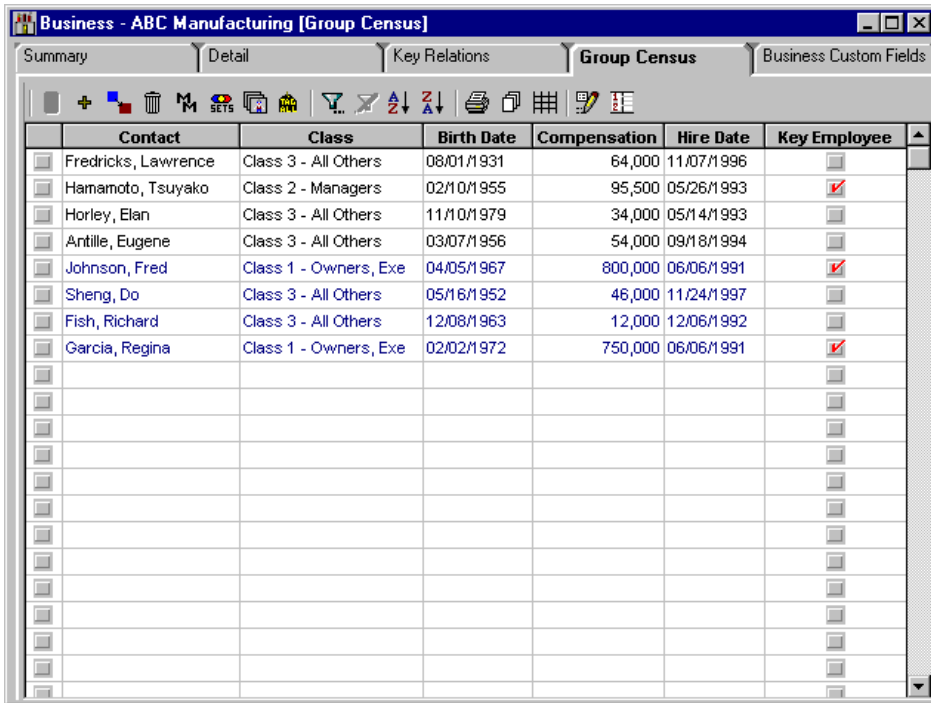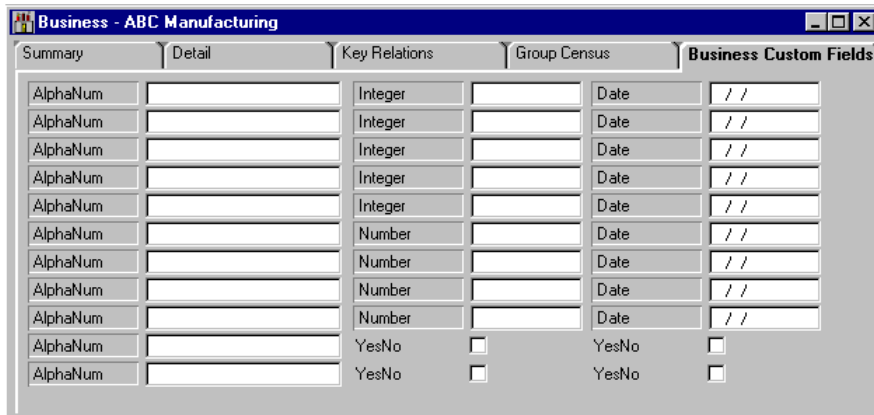## Business Records

The specially designed business **Detail** tab provides names, addresses and other facts about individual Business clients.
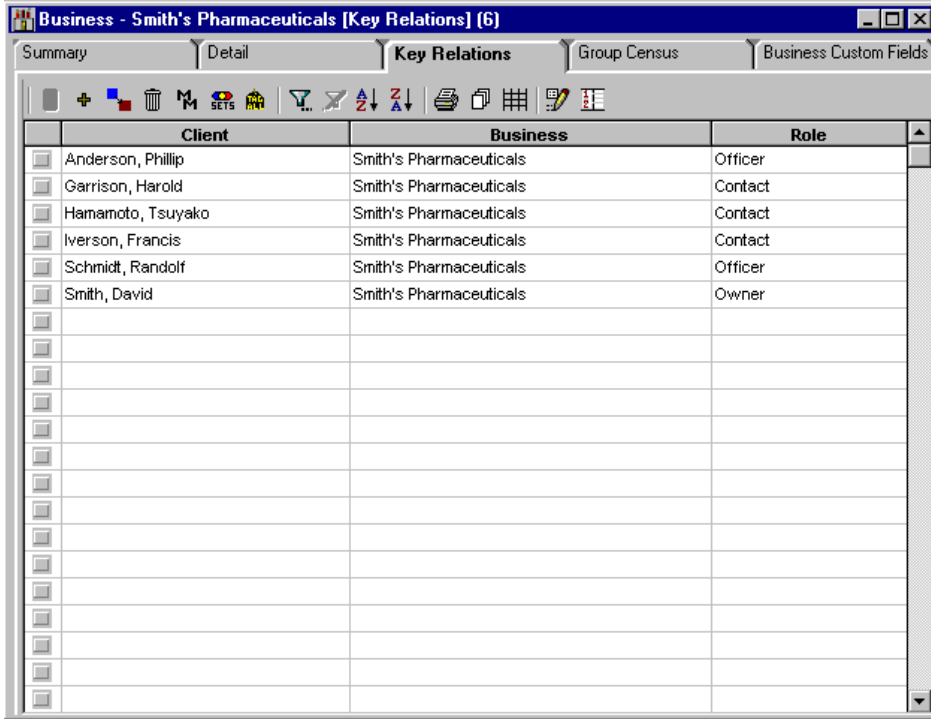
Store the **Key Relations** for a business as part of the business record and quickly access the Contact records from this tab.
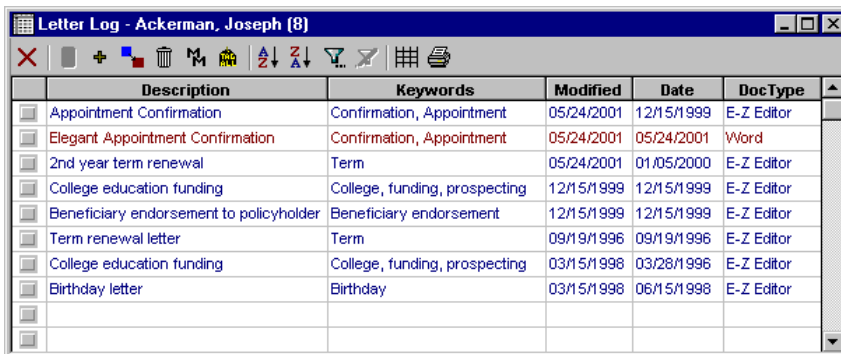

Use the **Group Census** information tab for employee records. Instantly sort employee data by any criteria (e.g., last name, compensation, hire date, date of birth, etc.).

The **Business Custom Fields** tab has over 30 fields that you can customize to store categorical information about the business.

Word Processing

The Contact and Business record Letter Log stores copies of all correspondence for instant retrieval of the entire document. Write letters using Microsoft Word or use the CDS internal word processor, E-Z Editor.

SmartPad: the Intelligent Notepad
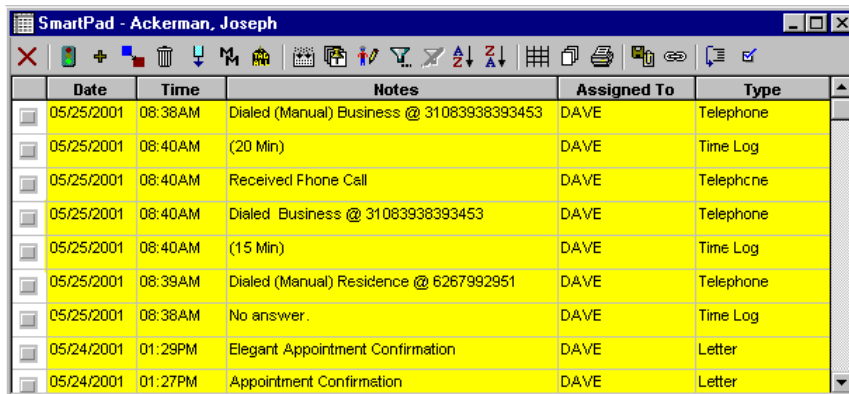
The SmartPad provides a consolidated view of events or activities related to a Contact or Business. Make a note, write a letter, schedule an appointment, add a policy or investment, place a telephone call, send a FAX—CDS posts notations for all of these events and activities to the Contact or Business SmartPad. Search a SmartPad by topic, keyword, or user—search any field that stores data. Filter the list to only display notes for a specific topic, date, type, etc.

Activity Tracking

Thoughtfully designed calendar windows enable efficient activity management. Daily, weekly, and monthly calendar views accommodate a wide variety of scheduling practices.
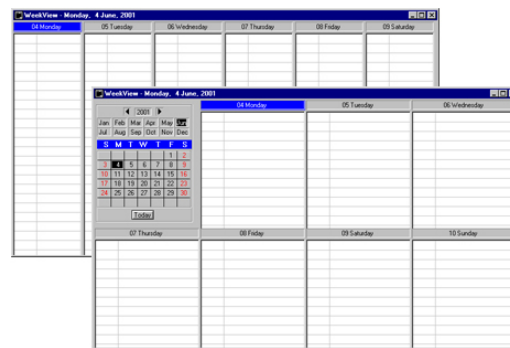
DayView Calendars

Three views are available for the DayView Calendar. Click the **DayView** button to open the calendar; click the button again to change the view. Link calendar activities to contact, business, or policy records for an effective follow-up strategy. Sort and Filter daily activities by any criteria. Quickly identify and act on your best opportunities. CDS moves unfinished activities forward automatically each day, so you never miss an activity. Print your calendars in various formats to take with you when you are in the field.
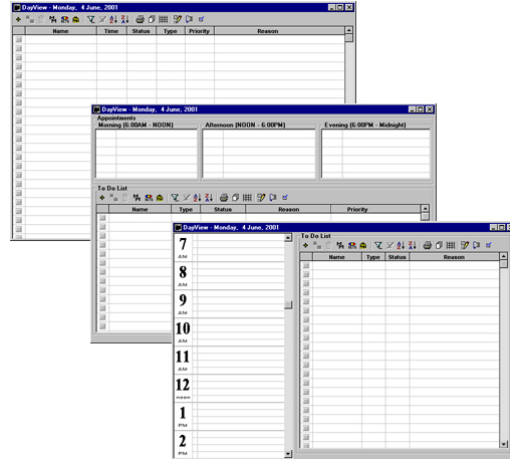
WeekView Calendars

The WeekView calendar has two views; a summary view for listing activities for each day of the week, and a scheduling view for using drag-and-drop operations to quickly reschedule an appointment to another week

MonthView Calendar

The MonthView calendar provides a view of activities for the entire month. The right side of the window displays the schedule for the date selected on the calendar. Click the **Previous** and **Next** arrows to navigate easily to any month of any year.
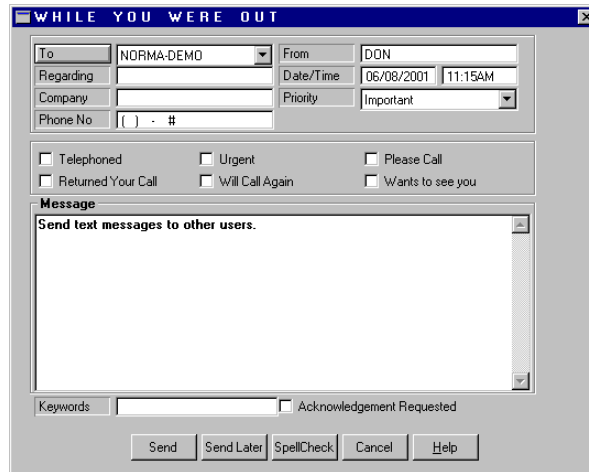
Messaging

Send messages to other CDS users on your network; save messages to the SmartPad and refer these messages at your convenience. Recipients can easily reply to messages, making CDS messaging an efficient method for communication in the office.
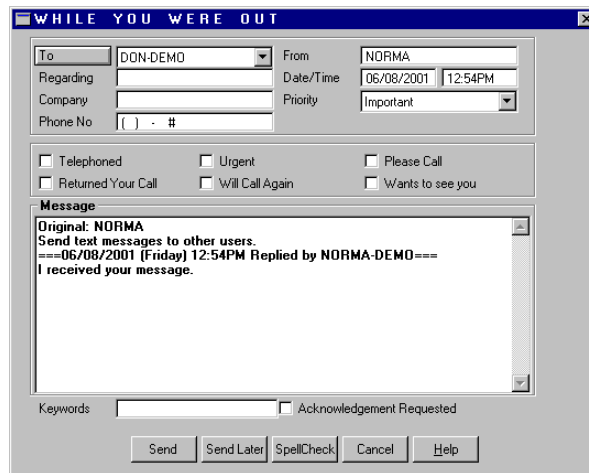
Sending a Message

1. Click the **Messages** button to open the Messages window.

2. Click the **New Message** button to open the Message Recipients dialog box.

3. Select the name of the recipient(s) and then click the **OK** button.

4. When the **While You Were Out** dialog box opens, enter the text of your message and then click the **Send** button.

Replying to Messages

1. Click the **Messages** button to open the Messages window.

2. Select the message that you want to send a reply to and then click the **Reply** button to open the **While You Were Out** dialog box with the sender's original message.


3. Enter your reply in the message box and then click the **Send** button.

For more information, see the Online Help sub topics under Messaging.


Dialing Phone Numbers

Click the **Dial Phone** button with an open Contact or Business record to display all available phone numbers for the record. Select a phone number on the list and then click the **Dial** button to dial the selected phone number through your computer's modem. When you are finished with the call, CDS can automatically log this event in the SmartPad for the Contact or Business.
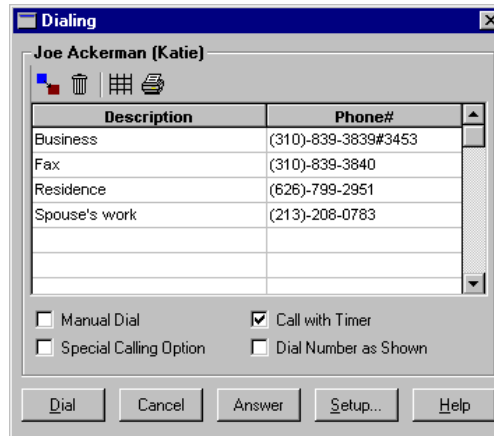
For more information, see the Online Help sub topic Dialing Phone Numbers under Contact (Client) Records.

Dynamic Reports

Dynamic Reports™ is a powerful feature in CDS. Create a virtually unlimited number of Activity, Agent, Contact, Policy, and Vendor reports with your own search criteria. For example, running the Dynamic Report "Birthdays next 30 days - All Contacts" produces a report that lists all Contacts who have a birthday in the next 30 days. Double-click any of the records on the report to access the underlying Contact record.
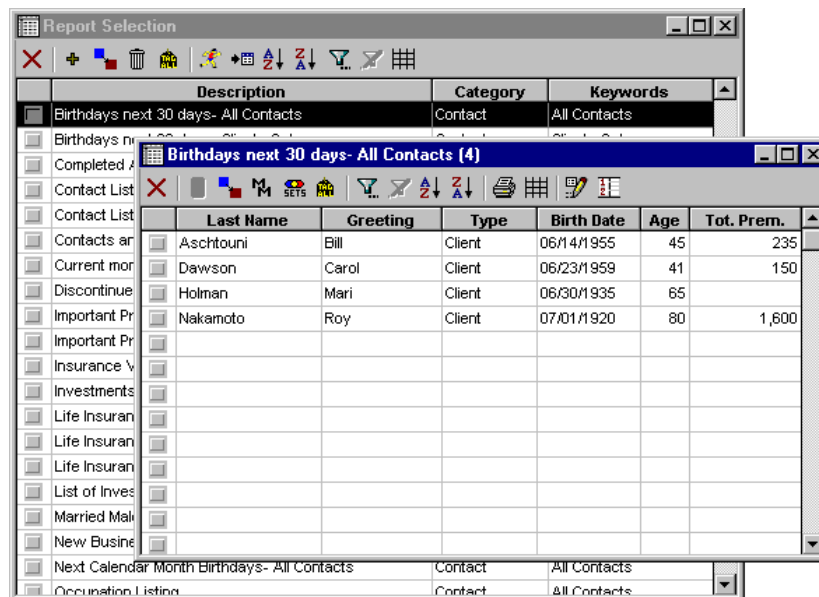
For more information, see the Online Help sub topic Dynamic Reports under Database Reporting.

Policy Tracking

CDS provides a complete policy tracking system. Policy information is categorized and displayed on a variety of tabs. Click a vertical tab on the left side of the Policy window to list policies by type and then click the horizontal tabs after selecting a policy record to view the policy details.
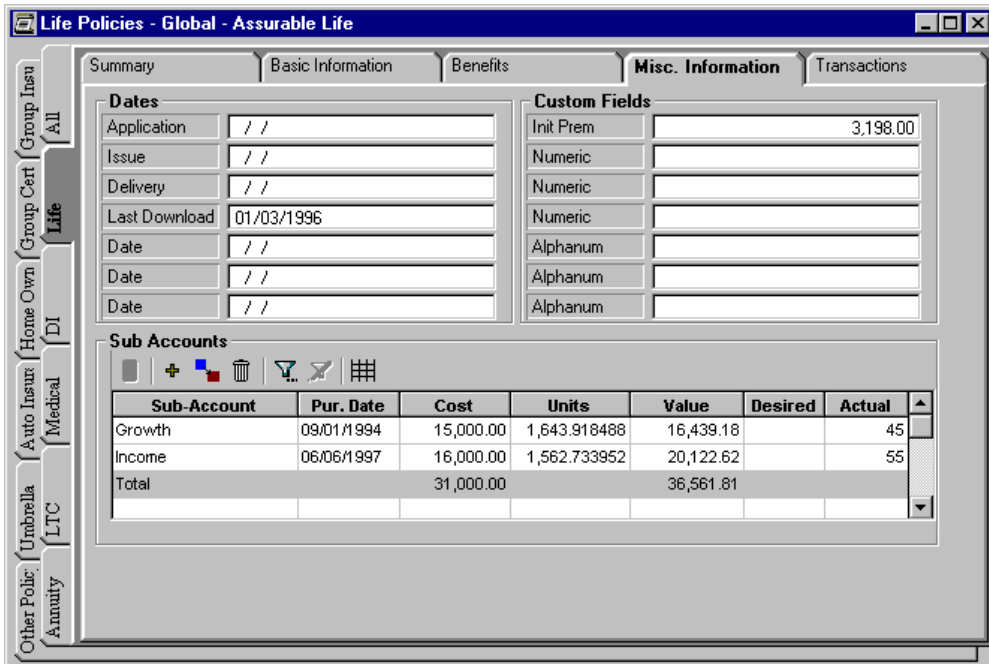

The **Basic Information** tab stores the details about a policy, including a list of all **Interested Parties**.

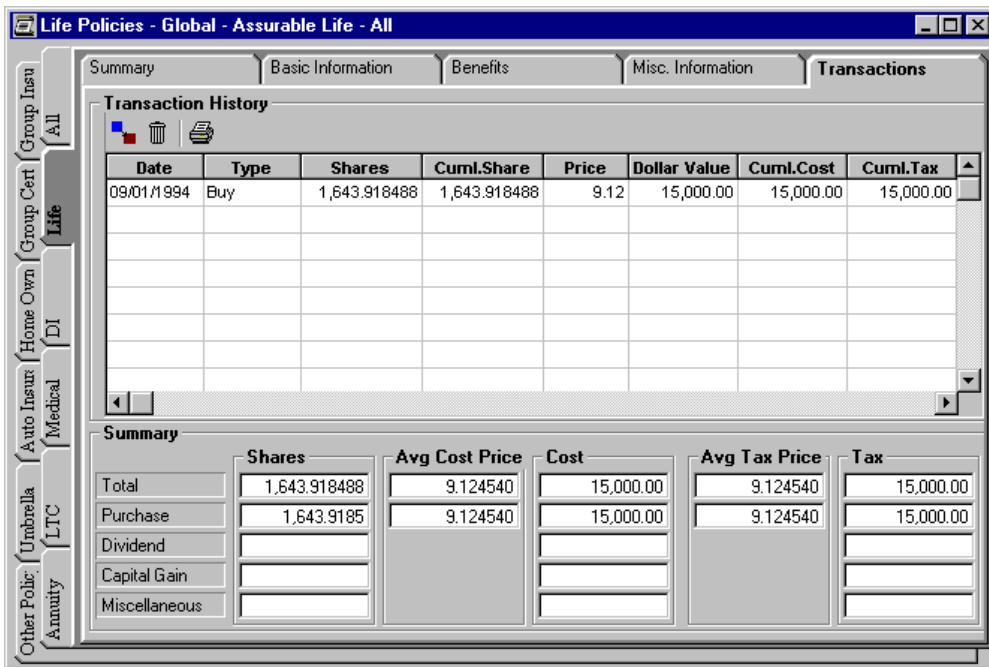The **Benefits** tab stores policy values and any **Riders** that the policy may have.

The **Miscellaneous Information** tab stores effective dates and contains several custom fields to store other important information. This tab also lists any **Sub Accounts** that are related to the policy for variable life and variable annuity insurance products.

The **Transactions** tab stores the sub account transactions for variable life and variable annuity policies.

For more information, see the Online Help topics under Policy Records.

Glossary of Terms

ALPHA KEY

This is the default label for a customizable field that can be used for sorting or locating records.

Category

Specific classes or types of records that are grouped together.

Character

A character is any letter, number or symbol. Character fields may contain alphabetic characters, numbers, and special characters unless the field is limited to one type of character.

Client No.

A unique number that CDS assigns to a Contact record when it is added to the database.

Column Name

The heading that appears in the first row of a spreadsheet that identifies each column of information.

Columns

A column is a series of data elements that are arranged vertically in a spreadsheet.

Date Offset Symbols

Expressions used in the Date Operations dialog box in place of an actual number (i.e., "nn" for "next", "cc" for "current", "pp" for "previous", "??" for "any").

Default

A setting or value that will be used if no changes are made.

Desktop

The desktop is the first window that is displayed after logging in to the CDS program.

Field Prompt

A field prompt is the label that is adjacent to a data field that indicates the intended use for the field.

Field Type

The field type determines what kind of characters the field will accept. For example, an alphanumeric field type accepts letters and numbers, while a numeric field type accepts numbers only.

Fields

Fields are the data storage areas in database records.

Global List

A complete listing of individual items in one database table.

Illustration

A screen capture or other visual representation of information that is used for clarification.

Important Dates

Events that are extracted from Contact records and used to automatically schedule activities. Important dates include dates of birth, policy renewal dates, and investment maturity dates.

Index

A reference to the location of records and key fields in the CDS database.

Key Relations

Dependents, other Contacts or businesses that are associated with a Contact.

Merge Code

Merge Codes represent the data that is stored in specific fields of Contact or Business records. These codes are typically used to merge the unique data in Contact and Business records into common form letters and envelopes for mass distribution.

Modal Factor

The number that is multiplied by the total annual premium to calculate the amount of each payment when a premium is paid semiannually, quarterly, monthly, etc. For example, if the annual premium is $1,200, and the modal factor for PAC (pre-authorized check) monthly is .0875, the monthly payment would be $105.

Numeric

A number character (e.g., 1, 2, 3).

Operator

A symbol or word that is used to include, exclude, or otherwise differentiate between fields of data.

Path Name

The logical route that links two computers together; the drive specification, directories, and subdirectories that identify the exact location of a target directory or file on a computer.

Preferred Address

The Preferred Address is a setting in Contact and Business records that indicates which address to use during a program function.

Range

The inclusive values (dates, numbers, characters, etc.) between one fixed point and another.

Read Only

Read Only is an attribute that is applied to files and records to prevent changes or deletion.

Records

A group of related fields in a database that describe a Contact, business, policy, etc.

Recurring Activity

A recurring activity is an event that occurs at regular intervals. For example, a production meeting that occurs every Tuesday at noon.

Set

A Set is a group of records in a database that are categorically related.

Sort Order

The arrangement of records, or other database elements, in a specific sequence.

Table

A table is an orderly arrangement of data in rows and columns.

Tag

Tags are used to mark records for inclusion in a process. Typically, records are tagged by clicking a checkbox next to the name of the record.

Type Field

The Type Field is used to categorize contact records (e.g., Family, Client, Friend, etc.)

User Profile

The User Profile contains the preferences and security settings for the user.

Validate

To check and/or correct the relational integrity between the rows in different database tables, and to recalculate referential data.