Contact List

PWR810.RPT

Overview

Purpose of the Report

The Contact List allows you to review each contact's information entered in Client Properties.

When to Produce the Report

Produce this report when you want to review detail information about your clients' contacts.

Permissions Required to Access the Report

An employee must have 'Client Access' checked in the Employee's Permissions to be able to produce this report.

Sort Options Available

You can determine the order that the clients appear on the report by choosing one or more of the following fields:

- Contact Name
- Client-Engagement
- Client ID
- Client Engagement
- Billing Engagement
- Client Name
- Partner
- Manager
- Biller
- Billing Reviewer
- Accountant
- Group
- Office
- NAICS Code
- Entity

- Client Type1
- Client Type2
- Client Type1 1
- Client Type1 2
- Client Type1 3
- Client Type1 4
- Client Type1 5
- Client Type2 1
- Client Type2 2
- Client Type2 3
- Client Type2 4
- Client Type2 5

Note: The subtotal check box on the Sort tab is disabled for this report since there is no information available to produce a subtotal.

Select Options Available

You can determine which clients will appear on the report by entering a range or a list in one or more of the following fields:

- Client ID
- Client Engagement
- Billing Engagement
- Partner
- Manager
- Biller
- Billing Reviewer
- Accountant
- Group
- Office
- NAICS Code
- Entity
- Client Type1
- Client Type2

Format Options

Presentation Options

You can choose which report to print:

- Contact List - Condensed - to include only the client and engagement ID, client name, contact name, and phone number on the report.
- Contact List - Full Data - includes additional phone information, whether the listed contact is the primary contact or not, title, and job description for each contact listed on the report.

Report Layout

Contact List - Condensed

Employee: (1) Page: 1

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Contact List - Condensed
For the Period Ending August 31, 1997

Client	Engage.	Client Engagement Name			
(2)	(3)	(4)			
		(5)	Phone:	(6)	(7)

Contact List - Full Data

Employee: (1) Page: 1

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Contact List - Full Data

For the Period Ending August 31, 1997

Client	Engage.	Client Engagement Name				
(2)	(3)	(4)				
		(5)		Phone:	(6)	(7)
		(8)		FAX:	(9)	(10)
		(11)		Other:	(12)	(13)
		(14)		Pager:	(15)	
		Primary Contact: (16)	Title: (17)			
		(18)				

(1) Calculated field: Employee ID of Employee producing the report.
(2) From: Client ID in Client Properties (General).
(3) From: Engagement ID in Client Properties (General).
(4) From: Client Name in Client Properties (General).
(5) Calculated field: The PersonalTitle plus FirstName plus MiddleName plus LastName in the CONTACT records.
(6) From: Phone in Client Properties (Contact Properties).
(7) From: Phone Extension in Client Properties (Contact Properties).
(8) Calculated field: The Address1 plus Address2 in CONTACT records.
(9) From: FAX in Client Properties (Contact Properties).
(10) From: FAX Extension in Client Properties (Contact Properties).
(11) Calculated field: The City plus State plus ZIP plus Country in CONTACT records.
(12) From: Other Phone in Client Properties (Contact Properties).
(13) From: Other Phone Extension in Client Properties (Contact Properties).
(14) From: E-Mail in Client Properties (Contact Properties).
(15) From: Pager in Client Properties (Contact Properties).
(16) Calculated field: If PrimaryContact field in CONTACT records is set to 'P', then it prints 'Yes', otherwise it prints 'No'.
(17) From: Job Title in Client Properties (Contact Properties).
(18) From: Notes in Client Properties (Contact Properties).