## RUNNING A REPORT TO ESTABLISH IF CLIENTS HAVE A DEFAULT EMAIL SET-UP

You may find yourself in a position where you need to find out if your clients have email addresses registered in CPL and if their email address is set as their default mode of contact.
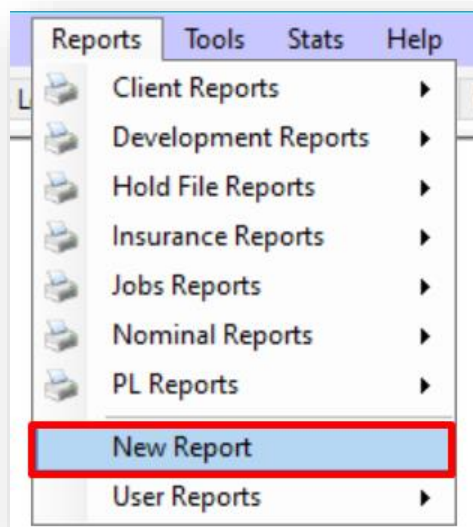
You can create a **User Report** which will display this information for one Development or across several Developments.

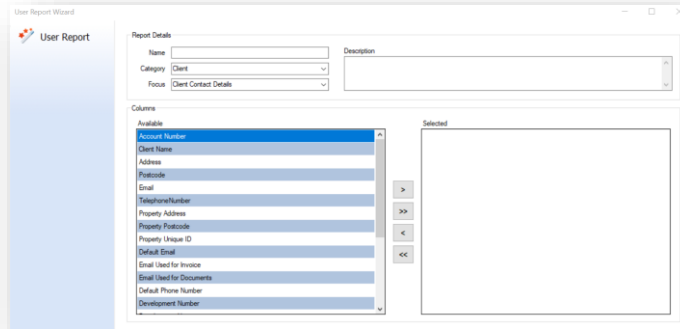Follow the steps below to create this report.

Access **Reports** from the main menu bar in CPL.
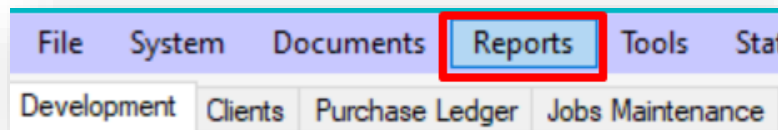
Click on the drop-down menu for **Reports** and select **New Report** to create your own.

The **User Report Wizard** will launch.

The Wizard offers you some filters in the upper half of the screen which will set the information available in the tables in the lower half of the screen.

In the **Report Details** section, give your report a **Name** and a **Description** as appropriate to your purposes.
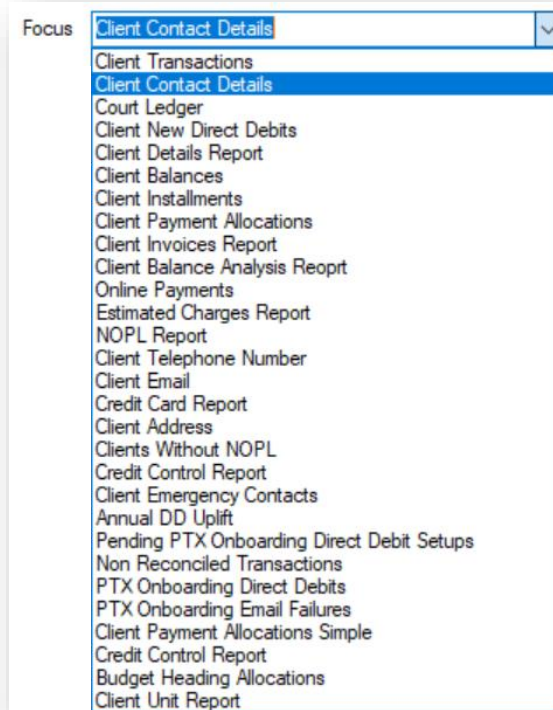

The **Category** and **Focus** fields allow you to specify what information held in CPL your report will display.

Use the **Category** drop-down menu to select **Client** in this instance.
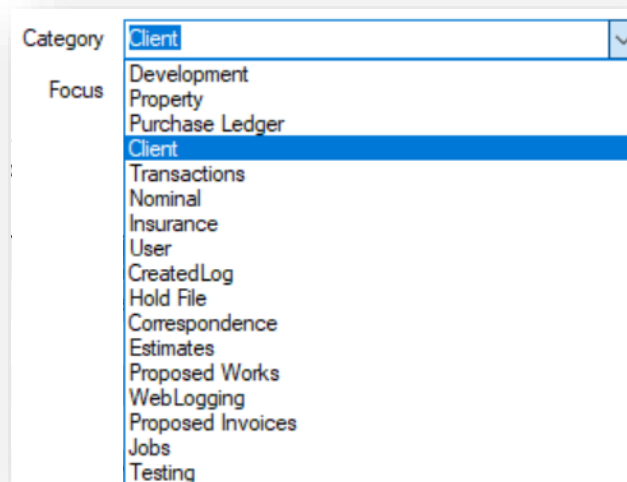
This will change the information available in the **Focus** drop-down menu. As we're dealing with email then choose **Client Contact Details** option at this point.


There are two grids in the lower half of the screen. The one on the left is for the **Available** information you can select from for the report and the one on the right is for the information you have **Selected**. To include the information in the report you need to use the arrows to move the items across to the **Selected** grid. The single arrows move individual items selected in the direction the arrow is pointing in and the double arrows move all items in an individual direction from one grid to the other.


For the purposes of this particular report click to highlight each of **Client Name**, **Development Number** and **Default Email** over to the **Selected** grid. The order they are listed in the **Selected** grid is the order they will appear in your report from left to right.
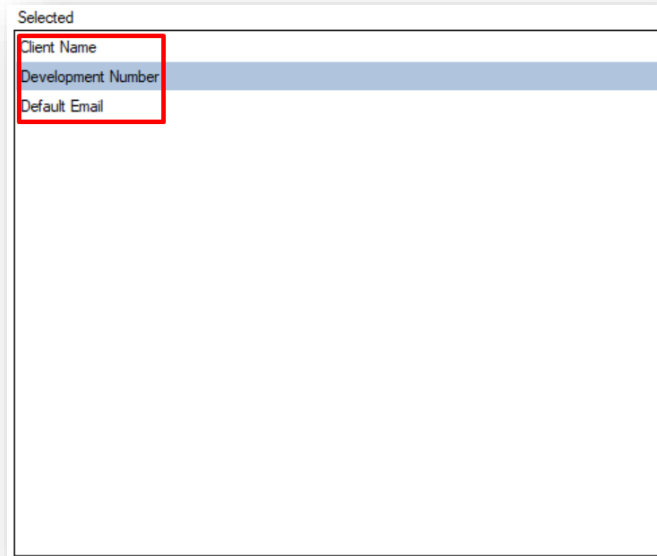
Once you have moved these items over, click on **Next** to move through to the **Query Build**.
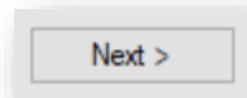
On the **Query Build** screen you will be able to further detail which information you would like to display in your report. Click on the **+** symbol to get started.
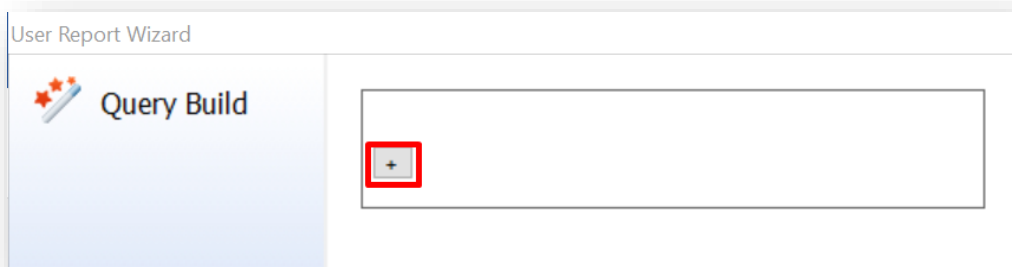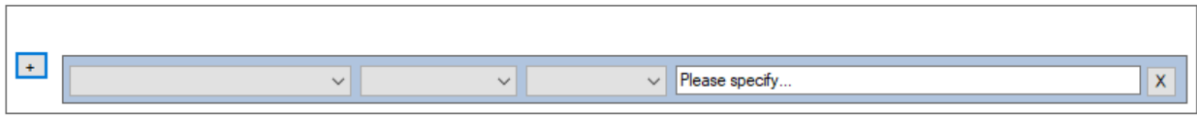

You will see two options for to choose from, **Column** and **Group**.

Choosing **Group** will then let you add additional **Columns** but for this report we will choose **Column**.
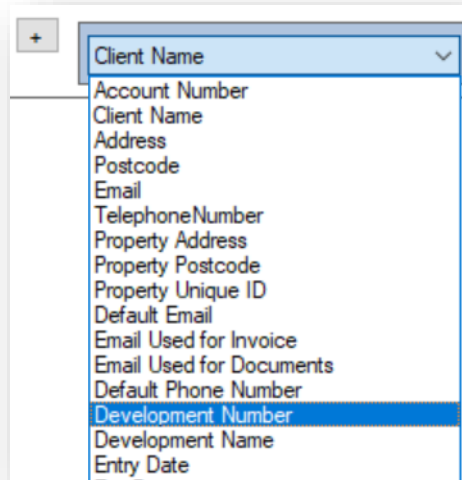
This will take you to another **Query Build** screen with several drop-down options.


These will allow you to further specify which information will be used and how it will be displayed.

Start with the left-hand field and choose **Development Number** from the drop-down menu:

In the second field choose one of the options depending on the number of Developments you would like to run the report for. In this example we have chosen **Greater Than Or Equal To** from the drop-down menu. This will allow us to specify a starting number for our Developments to run from in the report.
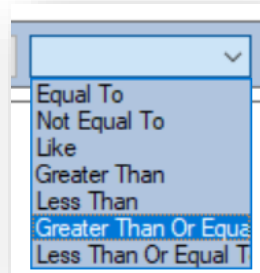
In the third field along choose **Set** from the drop-down menu. This is to allow us to specify what the number of the first Development will be.
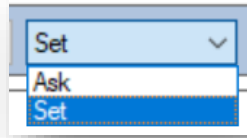
This will allow us to enter the first Development Number in the **Please specify** field. To do this, first highlight and delete the text.

Once we have specified all the information we require in this screen we are ready to generate the report.

Click on the **Next** button in the bottom right-hand corner of the screen.

You can use the back button to return to earlier steps in the Wizard if you would like to make any changes before further organising and generating your report.
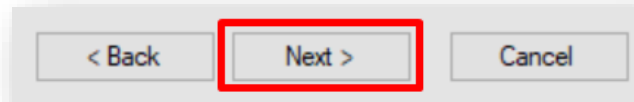
This will lead you to the **Specification** screen where you get the option to make further changes to how your report will be organised by clicking on **Show Advanced Properties**.

Alternatively, you can choose to click **Run**.
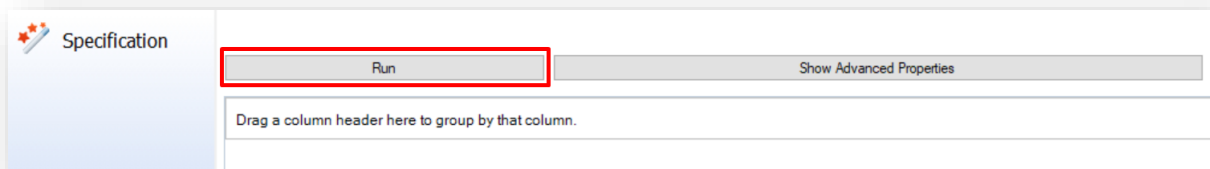
This will take you to a view of your report in the second **Specification** screen.

You can choose to drag the columns around by the column header if you would like to reorganise them.

You can also click on each column header to order your report by this column.

For our example, we have a list of clients, the development they have a property in and whether they have a default email in CPL. This is denoted by the word **True** in this column.

In our report it may be easier to order the information by **Default Email** and so we can click in this column header to achieve this.

Our report will now be ordered by a group who do not have a default email listing and a group who do.

Once you are happy with the organisation of your report you can click on the **Next** button to move to the **Preview** screen for your report.

There are various options available to you from this screen:
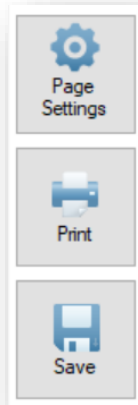
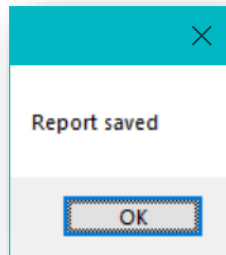- There are some simple **Page Settings** you can use.
- You can send your document straight to any printer you have available.
- You can choose to save your report as an Excel file.

If you wish to be able to run this report again you can choose to save it. To do this, click on the **Finish** button. You will see a pop-up message telling you that your report has been saved.

Your report will then be available in the **Reports** menu. Scroll down to **User Reports** and then across to the category you chose when creating it. In this instance, our report is stored under the **Client** reports.
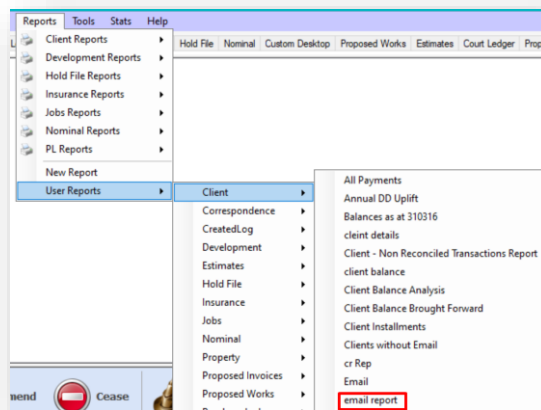
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