



Client Mass Marketing Export Reports Library

The Client Mass Marketing Export Reports Library contains eight reports that list client personal data such as address and telephone information. Because some reports contain many columns of data, they are best saved to an Excel file for further use. Download the **client_mass_marketing_export_reports.pbl** and use the Library Report Manager utility within Needles to easily copy the reports into your firm's main report library file.

Client Info Detailed

Report Name:	client_info_detailed_export_all
Report Prompts:	Begin_Date_Closed (Date) End_Date_Closed (Date)
Description:	Lists all client parties in both open and closed cases. Shows Prefix, First Name, Middle, Last Name, Suffix, Default Address, Default Address2, Default City, Default State, Default Zipcode, Default County, Home Phone, Work Phone, Mobile Phone, Fax Number, Company/Contact, Date of Birth, Home Email, Work Email, Case Number, Case Type, Class, Date Opened, Close Date, Staff 1. Sorted by Name, then by Case Number. Clients who have more than one case will appear in multiple rows. Report is best used for exporting to an Excel file.
Orientation:	Landscape

Sample:

Client Info Detailed																
(All Client Parties in Open and Closed Cases)																
Client (First, Middle, Last, Suffix)	Address 1	Address 2	City	State	Zip Code	County	Home Phone	Work Phone	Mobile Phone	Fax Number	Company/Contact	Date of Birth	Home Email	Work Email	Case #	Staff 1
Mrs. Joyce Adams	1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5245					02/21/1955			200544	ATTORNEY
Mrs. Glynn Adams	1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5245								200544	ATTORNEY
Mrs. Glynn Adams	1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5245								200545	ATTORNEY
JUDY ALLRED	115 KAY ST	# 25	GUNTOWN	MD	28549		(000) 675-2527								200584	ATTORNEY
Mrs. Mary Appleton	1535 Whispering Pines Drive	Apt. 190	Annapolis	MD	21412		(555) 555-4365 (555) 555-5232					05/25/1957			200016	ATTORNEY
Mrs. Margaret A. Baker	337 Porter Ave.	Apt. 22	Ellicott	MD	21043	Howard	(555) 555-2333 (555) 555-6000					01/01/1955	mbaker@veriana.com		200001	ATTORNEY
Mrs. Patricia C. Barr	22 Franklin Road		Chingva Mills	MD	21117	Baltimore	(555) 555-6432					04/24/1972			200019	ATTORNEY
Mrs. Debra Bernell	333 Second Ave.		Parkton	MD	21120	Baltimore	(555) 555-7281 (555) 555-5272					09/11/1977			200007	ATTORNEY
Mrs. Debra Bernell	333 Second Ave.		Parkton	MD	21120	Baltimore	(555) 555-7281 (555) 555-5272					09/11/1977			200020	ATTORNEY
Mrs. Nicholas T. Bradman	1347 Tusculum Drive		Charles Town	WV	25414	Jefferson	(555) 123-4566					09/21/1925			200031	ATTORNEY
Mrs. Curtis L. Browning	5251 Wallburg Road		Sie	PA	16510	Sie	(614) 333-1234					05/21/1950	browning35@outlook.com		200030	ATTORNEY
Mrs. Curtis L. Browning	5251 Wallburg Road		Sie	PA	16510	Sie	(614) 333-1234					05/21/1950	browning35@outlook.com		200046	ATTORNEY
Chase	1500 Park Avenue		New York	NY	10002	New York	(555) 555-1500								200023	ATTORNEY
Mrs. Sarah Clark	5724 East Parkway Drive		Columbia	MD	21045		(555) 555-4300					01/05/1952			200029	ATTORNEY
Mrs. Diana L. Cross	2554 Oakfield Road		Chingva Mills	MD	21117	Baltimore	(555) 555-1436 (555) 555-1236					06/12/1952			200025	ATTORNEY
Mrs. Theresa K. Cruz	5721 Montgomery Ave		Glen Echo	MD	208120	Montgomery	(555) 555-1232 (555) 555-3333					10/06/1974			200026	ATTORNEY
Mrs. Alice F. Decker	35 Sunfield Court		Reston	MD	21126	Baltimore	(555) 555-5119 (555) 555-5555					05/22/1955	adecker@prodigy.net		200028	ATTORNEY
Mrs. Robert L. Dixon	5121 Mountain Laurel Road		Palmira	VA	22963	Fluvanna						01/03/1925			200025	ATTORNEY
Mrs. James W. Fletcher	4021 Morton Street		Smyrna	TN	37187	Rutherford	(615) 301-4221 (615) 954-0001 (615) 555 - 0512					02/12/1950	jwfletcher@myatt.com		200023	ATTORNEY
Mrs. Sally R. Freeman	4524 High Street		Washington	DC	200090	District of Columbia	(555) 555-2929 (555) 555-5555					11/30/1976			200017	ATTORNEY
Mrs. Louise	Geco Plaza	1200 K Street, NW	Washington	DC	20006		(555) 555-5555								200010	ATTORNEY
															200055	ATTORNEY

client_info_detailed_export_all



Client Info Details Export by Intake Date

Report Name:	client_info_detailed_export_by_intake_date
Report Prompts:	Begin_Intake_Date (Date) End_Intake_Date (Date)
Description:	Lists all client parties in both open and closed cases where the Intake Date is between the date range entered at the prompts. Shows Prefix, First Name, Middle, Last Name, Suffix, Default Address, Default Address2, Default City, Default State, Default Zipcode, Default County, Home Phone, Work Phone, Mobile Phone, Fax Number, Company/Contact, Date of Birth, Home Email, Work Email, Case Number, Case Type, Class, Date Opened, Close Date, Staff 1. Sorted by Name, then by Case Number. Clients who have more than one case will appear in multiple rows. Report is best used for exporting to an Excel file.
Orientation:	Landscape

Sample:

Client Info Details Export by Intake Date																
Page 1 of 5																
Client (First/Initial/Last/Suffix)	Address 1	Address 2	City	State	Zip	County	Home Phone	Work Phone	Mobile Phone	Fax Number	Company/Contact	Date of Birth	Home Email	Work Email	Case #	Intake Date
Mrs. Glynn Adams	1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5545	() -	() -	() -					200044	08/20/2013
Mrs. Glynn Adams	1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5545	() -	() -	() -					200045	08/20/2013
JUDY ALLRED	110 KAY ST	# 25	GUNTOWN	MD	20540		(000) 875-3537	() -	() -	() -					200064	07/16/2008
Mrs. Mary Appleton	1822 Whispering Pines Dr	Apt. 190	Annapolis	MD	21402		(555) 555-4566	(555) 555-5232	() -	() -		05/25/1957			200016	08/20/2013
Mrs. Margaret A. Baker	327 Porter Ave.	Apt. 32	Bloom	MD	21042	Howard	(555) 555-2255	(555) 555-5500	() -	() -		01/01/1955	mbaker@veritema.com		200001	10/11/2012
Mrs. Patricia C. Bar	22 Franklin Road		Orange Mills	MD	21117	Baltimore	(555) 555-9452	() -	() -	() -		04/24/1972			200019	08/20/2013
Mrs. Debra Bennett	333 Second Ave.		Parkton	MD	21120	Baltimore	(555) 555-7261	(555) 555-5272	() -	() -		02/11/1977			200007	07/12/2013
Mrs. Debra Bennett	333 Second Ave.		Parkton	MD	21120	Baltimore	(555) 555-7261	(555) 555-5272	() -	() -		02/11/1977			200020	08/05/2013
Mr. Nicholas T. Bradshaw	1247 Tusculum Drive		Charles Town	WV	25414	Jefferson	(555) 123-4566	() -	() -	() -		05/21/1955			200031	11/24/2013
Mr. Curtis L. Browning	5251 Wallburg Road		Gile	PA	16510	Gile	(514) 333-1234	() -	() -	() -		05/21/1950	cbrowning35@outlook.co		200030	05/14/2013
Mr. Curtis L. Browning	5251 Wallburg Road		Gile	PA	16510	Gile	(514) 333-1234	() -	() -	() -		05/21/1950	cbrowning35@outlook.co		200046	05/14/2013
Chase	1800 Park Avenue		New York	NY	10022	New York	(555) 555-1800	() -	() -	(555) 555-5555					200023	04/08/2014
Mrs. Sarah Clark	572A East Parkway Drive		Columbia	MD	21046		(555) 555-4500	() -	() -	() -		07/05/1962			200029	01/27/2014
Mrs. Dana L. Cress	5504 Oakfield Road		Orange Mills	MD	21117	Baltimore	(555) 555-1456	(555) 555-1236	() -	() -		06/12/1962			200026	12/27/2013
Mrs. Theresa K. Cruz	3721 Montgomery Ave		Glen Echo	MD	20820	Montgomery	(555) 555-1230	(555) 555-2332	() -	() -		10/06/1974			200006	12/27/2013
Mrs. Alice R. Dedier	26 Sunfield Court		Rancharoscam	MD	21126	Baltimore	(555) 555-5119	(555) 555-2222	() -	() -		05/22/1955	adedier@prodigy.net		200026	11/07/2013
Mr. Robert L. Dickson	6121 Mountain Laurel Road		Palmira	VA	22963	Pulaski	() -	() -	() -	() -		07/02/1955			200025	02/20/2014
Mr. James W. Felcher	4061 Marion Street		Smyrna	TN	37167	Rutherford	(615) 201-4321	(615) 264-0001	(615) 555-0513	() -		03/19/1950	jfelcher@ymail.com		200033	05/19/2014
Mrs. Sally R. Freeman	4534 High Street		Washington	DC	20002	District of Columbia	(555) 555-2929	(555) 555-5555	() -	() -		11/30/1976			200017	11/11/2012
Mrs. Lorelei Gilmore	Geico Plaza	1200 K Street, NW	Washington	DC	20016		(555) 555-6556	() -	() -	(555) 555-6532	This is the Contact Name				200010	05/23/2014
							() -	() -	() -	() -					200065	05/21/2016

client_info_detailed_export_by_intake_date



Client Info Detailed Open Cases

Report Name:	client_info_detailed_export_open_cases
Report Prompts:	None
Description:	Lists all client parties in open cases. Shows Prefix, First Name, Middle, Last Name, Suffix, Default Address, Default Address2, Default City, Default State, Default Zipcode, Default County, Home Phone, Work Phone, Mobile Phone, Fax Number, Company/Contact, Date of Birth, Home Email, Work Email, Case Number, Case Type, Class, Date Opened, Close Date, Staff 1. Sorted by Name, then by Case Number. Clients who have more than one case will appear in multiple rows. Report is best used for exporting to an Excel file.
Orientation:	Landscape

Sample:

Client Info Detailed Open Cases																
(All Client Parties in Open Cases)																
Client Prefix/Middle/Last/Last Suffix	Address 1	Address 2	City	State	Zip Code	County	Home Phone	Work Phone	Mobile Phone	Fax Number	Company/Contact	Date of Birth	Home Email	Work Email	Case #	Case Type
Mr. George Tiberia Adams	S.A. 1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5345	(555) 555-2344	(301) 485-1448	(555) 555-2345		10/10/1980	getama@client.com		200002	MVA INV
Mr. George Tiberia Adams	S.A. 1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5345	(555) 555-2344	(301) 485-1448	(555) 555-2345		10/10/1980	getama@client.com		200002	PL NGS
Mr. George Tiberia Adams	S.A. 1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5345	(555) 555-2344	(301) 485-1448	(555) 555-2345		10/10/1980	getama@client.com		200044	MVG SGT
Mr. George Tiberia Adams	S.A. 1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5345	(555) 555-2344	(301) 485-1448	(555) 555-2345		10/10/1980	getama@client.com		200045	SWG SGT
Mr. George Tiberia Adams	S.A. 1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5345	(555) 555-2344	(301) 485-1448	(555) 555-2345		10/10/1980	getama@client.com		200054	VIA3
Mr. George Tiberia Adams	S.A. 1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5345	(555) 555-2344	(301) 485-1448	(555) 555-2345		10/10/1980	getama@client.com		200085	OST
Mr. George Tiberia Adams	S.A. 1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5345	(555) 555-2344	(301) 485-1448	(555) 555-2345		10/10/1980	getama@client.com		200086	VIA3
Mr. George Tiberia Adams	S.A. 1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5345	(555) 555-2344	(301) 485-1448	(555) 555-2345		10/10/1980	getama@client.com		200070	MVA
Adams, Bank & Casati, P.A.	225 Waycross Drive		Orange Mills	MD	21117	Baltimore	() -	(410) 555-5445	(410) 555-5446				info@ABC.com		200052	Z&O
Miss Joyce Adams	1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5345	() -	() -	() -		02/21/1959			200044	MVG SGT
Mrs. Glynnis Adams	1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5345	() -	() -	() -					200044	MVG SGT
Mrs. Glynnis Adams	1200 Manchester Road		Baltimore	MD	21211	Baltimore	(555) 555-5345	() -	() -	() -					200045	SWG SGT
JUDY ALLRED	110 KAY ST	# 25	GUNTOWN		35549		(000) 676-2537	() -	() -	() -					200084	COL
Mrs. Mary Appleton	7828 Whispering Pine Drive Apt. 190		Annapolis	MD	21412		(555) 555-4586	(555) 555-9322	() -	() -		05/25/1987			200016	PRG NGS
Mrs. Patricia C. Bier	22 Franklin Road		Orange Mills	MD	21117	Baltimore	(555) 555-5433	() -	() -	() -	Address at time of death.	04/24/1972			200019	WRD INE
Mrs. Delores Bennett	333 Second Ave.		Parkton	MD	21120	Baltimore	(555) 555-7281	(555) 555-5272	() -	() -	Address as of date of death.	09/11/1977			200007	WRD LIT
Mrs. Delores Bennett	333 Second Ave.		Parkton	MD	21120	Baltimore	(555) 555-7281	(555) 555-5272	() -	() -	Address as of date of death.	09/11/1977			200020	PRG INV
Mr. Nicholas T. Bradshaw	1247 Tusculum Drive		Charles Town	WV	25414	Jefferson	(555) 123-4566	() -	() -	() -		09/27/1935			200031	OT LIT
client_info_detailed_export_open_cases																



E-Mail List Clients By Date Opened

Report Name:	email_list_clients_by_date_open
Report Prompts:	Begin_Opened_Date (Date) End_Opened_Date (Date)
Description:	Lists all client parties in cases opened between date range entered at the prompts. Shows Case Number, Prefix, First Name, Middle, Last Name, Suffix, Default Email, Case Type, Class, Date Opened, Close Date, Staff 1. Sorted by Name, then Date Opened. Report Summary includes Total Number of Clients and Total Number of Cases. Clients who have more than one case will appear in multiple rows. Report is best used for exporting to an Excel file.
Orientation:	Landscape

Sample:

05/01/2017

E-Mail List Clients By Date Opened

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For Cases Opened From 01/01/2000 - 12/31/2017

Case #	Prefix	First	Middle	Last	Suffix	Default Email	Type	Class	Date Opened	Date Closed	Staff 1
200044	Miss	Joyce		Adams			MVG	SET	06/16/2014		ATTORNEY
200052				Adams, Bank & Cassidy,		info@ABClaw.com	ZEQ		04/03/2015		ATTORNEY
200064		JUDY		ALLRED			COL		10/09/2015		ATTORNEY
200016	Mrs.	Mary		Appleton			PRE	NEG	08/20/2013		ATTORNEY
200001	Ms.	Margaret	A.	Baker		mbaker@writeme.com	PL	NEG	10/17/2013	08/09/2016	ATTORNEY
200019	Mrs.	Patricia	C.	Barr			WRD	INI	06/02/2014		ATTORNEY
200007	Ms.	Delores		Bennett			WRD	LIT	07/12/2013		PLLIT
200020	Ms.	Delores		Bennett			PRB	INV	08/08/2013		ATTORNEY
200031	Mr.	Nicholas	T.	Bradshaw			DT	LIT	11/25/2013		ATTORNEY
200030	Mr.	Curtis	L.	Browning		cbrowning36@outlook.com	DT	LIT	05/14/2013		ATTORNEY
200046	Mr.	Curtis	L.	Browning		cbrowning36@outlook.com	DTG	LIT	05/14/2013		ATTORNEY
200023				Chase			COL	INI	04/09/2014		ATTORNEY
200009	Ms.	Sarah		Clark			SS	INI	01/28/2014		ATTORNEY
200005	Ms.	Diana	L.	Cress			FAM	NEG	12/27/2013		ATTORNEY
200008	Ms.	Theresa	K.	Cruz			BKC		12/29/2013		ATTORNEY
200006	Ms.	Alice	F.	Decker		adecker@prodigy.net	WC	INI	11/07/2013		ATTORNEY
200035	Mr.	Robert	L.	Dickson			DT	LIT	02/20/2014		ATTORNEY
200033	Mr.	James	W.	Fletcher		jwfletch@mymail.com	DT	INV	05/20/2014		ATTORNEY
200017	Ms.	Sally	R.	Freeman			DT	LIT	11/11/2012		ATTORNEY
200010				Geico Insurance Company			DEF	LIT	05/22/2014		ATTORNEY
200069	Miss	Lorelai		Gilmore			BKC		09/21/2016		ATTORNEY
200011	Mr.	Robert	F.	Wilson			CRM		05/26/2014		ATTORNEY
200036	Mr.	Leonard		Wyatt			DT	INV	05/21/2014		ATTORNEY
200036	Mrs.	Wanda	C.	Wyatt			DT	INV	05/21/2014		ATTORNEY
Total Clients:									55		
Total Cases:									66		
(Clients with multiple matching cases will appear multiple times)											
e-mail_list_clients_by_date_open											



E-Mail List Clients In Open Cases

Report Name:	email_list_clients_open_cases
Report Prompts:	None
Description:	Lists all client parties in open cases. Shows Case Number, Prefix, First Name, Middle, Last Name, Suffix, Default Email, Case Type, Class, Date Opened, Close Date, Staff 1. Sorted by Name, then Date Opened. Report Summary includes Total Number of Clients and Total Number of Cases. Clients who have more than one case will appear in multiple rows.
Orientation:	Landscape

Sample:

05/01/2017

E-Mail List Clients In Open Cases

Page 1 of 4

Case #	Prefix	First	Middle	Last	Suffix	Default Email	Type	Class	Date Opened	Staff 1
200044	Miss	Joyce		Adams			MVG	SET	06/16/2014	ATTORNEY
200052				Adams, Bank & Cassic		info@ABClaw.com	ZEQ		04/03/2015	ATTORNEY
200064		JUDY		ALLRED			COL		10/09/2015	ATTORNEY
200016	Mrs.	Mary		Appleton			PRE	NEG	08/20/2013	ATTORNEY
200019	Mrs.	Patricia	C.	Barr			WRD	INI	06/02/2014	ATTORNEY
200007	Ms.	Delores		Bennett			WRD	LIT	07/12/2013	PLLIT
200020	Ms.	Delores		Bennett			PRB	INV	08/08/2013	ATTORNEY
200046	Mr.	Curtis	L.	Browning		cbrowning36@outlook.com	DTG	LIT	05/14/2013	ATTORNEY
200023				Chase			COL	INI	04/09/2014	ATTORNEY
200009	Ms.	Sarah		Clark			SS	INI	01/28/2014	ATTORNEY
200005	Ms.	Diana	L.	Cress			FAM	NEG	12/27/2013	ATTORNEY
200008	Ms.	Theresa	K.	Cruz			BKC		12/29/2013	ATTORNEY
200006	Ms.	Alice	F.	Decker		adecker@prodigy.net	WC	INI	11/07/2013	ATTORNEY
200035	Mr.	Robert	L.	Dickson			DT	LIT	02/20/2014	ATTORNEY
200033	Mr.	James	W.	Fletcher		jwfletch@mymail.com	DT	INV	05/20/2014	ATTORNEY
200017	Ms.	Sally	R.	Freeman			DT	LIT	11/11/2012	ATTORNEY
200010				Geico Insurance Comp			DEF	LIT	05/22/2014	ATTORNEY
200069	Miss	Lorelai		Gilmore			BKC		09/21/2016	ATTORNEY
200011	Mr.	Robert	F	Wilson			CRM		05/26/2014	ATTORNEY
200036	Mr.	Leonard		Wyatt			DT	INV	05/21/2014	ATTORNEY
200036	Mrs.	Wanda	C.	Wyatt			DT	INV	05/21/2014	ATTORNEY
Total Clients:							53			
Total Cases:							62			
(Clients with multiple matching cases will appear multiple times)										
e-mail_list_clients_open_cases										



Phone List - Clients By Date Opened

Report Name:	phone_list_clients_by_date_open
Report Prompts:	Begin_Opened_Date (Date) End_Opened_Date (Date)
Description:	Lists all client parties in cases opened between date range entered at the prompts. Shows Case Number, First Name, Last Name, Home Phone, Mobile Phone, Business Phone, Case Type, Class, Date Opened, Close Date, Staff 1. Sorted by Case Number. Report Summary includes Total Number of Clients and Total Number of Cases. Clients who have more than one case will appear in multiple rows.
Orientation:	Landscape

Sample:

05/01/2017

Phone List - Clients By Date Opened

Page 1 of 7

For Cases Opened From 01/01/2000 to 12/31/2017

Case #	First Name	Last Name	Home Phone	Mobile Phone	Business Phone	Type	Class	Date Opened	Date Closed	Staff 1
200001	Margaret	Baker	(555) 555-2285	() -	(555) 555-6600	PL	NEG	10/17/2013	08/09/2016	ATTORNEY
200002	George	Adams	(555) 555-8245	(301) 466-1446	(555) 555-2344	MVA	INV	06/20/2013		ATTORNEY
200003	George	Adams	(555) 555-8245	(301) 466-1446	(555) 555-2344	PL	NEG	06/20/2013		ATTORNEY
200004	Herbert	Lash	() -	() -	(555) 555-4440	MVA	DEM	06/25/2013		ATTORNEY
200005	Diana	Cress	(555) 555-1456	() -	(555) 555-1256	FAM	NEG	12/27/2013		ATTORNEY
200006	Alice	Decker	(555) 555-8119	() -	(555) 555-9999	WC	INI	11/07/2013		ATTORNEY
200007	Delores	Bennett	(555) 555-7261	() -	(555) 555-8272	WRD	LIT	07/12/2013		PLLIT
200008	Theresa	Cruz	(555) 555-1230	() -	(555) 555-2533	BKC		12/29/2013		ATTORNEY
200009	Sarah	Clark	(555) 555-4500	() -	() -	SS	INI	01/28/2014		ATTORNEY
200010		Geico Insurance	() -	() -	(555) 555-6586	DEF	LIT	05/22/2014		ATTORNEY
200070	George	Adams	(555) 555-8245	(301) 466-1446	(555) 555-2344	MVA		10/25/2016		ATTORNEY
200071	Lorelai	Gilmore	() -	() -	() -	DO1		01/27/2017		ATTORNEY
200072	Georgia	Murphy	(555) 555-4932	() -	(555) 555-4932	SS		02/13/2017		ATTORNEY
Total Clients : 55										
Total Cases : 66										
(Clients With Multiple Cases Will Appear Multiple Times)										
phone_list_clients_by_date_open										



Phone List - Clients In Open Cases

Report Name:	phone_list_clients_open_cases
Report Prompts:	None
Description:	Lists all client parties in open cases. Shows Case Number, First Name, Last Name, Home Phone, Mobile Phone, Business Phone, Case Type, Class, Date Opened, Close Date, Staff 1. Sorted by Case Number. Report Summary includes Total Number of Clients and Total Number of Cases. Clients who have more than one case will appear in multiple rows.
Orientation:	Landscape

Sample:

05/01/2017

Phone List - Clients In Open Cases

Page 1 of 5

Case #	First Name	Last Name	Home Phone	Mobile Phone	Business Phone	Type	Class	Date Opened	Date Closed	Staff 1
200002	George	Adams	(555) 555-8245	(301) 466-1446	(555) 555-2344	MVA	INV	06/20/2013		ATTORNEY
200003	George	Adams	(555) 555-8245	(301) 466-1446	(555) 555-2344	PL	NEG	06/20/2013		ATTORNEY
200004	Herbert	Lash	() -	() -	(555) 555-4440	MVA	DEM	06/25/2013		ATTORNEY
200005	Diana	Cress	(555) 555-1456	() -	(555) 555-1256	FAM	NEG	12/27/2013		ATTORNEY
200006	Alice	Decker	(555) 555-8119	() -	(555) 555-9999	WC	INI	11/07/2013		ATTORNEY
200007	Delores	Bennett	(555) 555-7261	() -	(555) 555-8272	WRD	LIT	07/12/2013		PLLIT
200008	Theresa	Cruz	(555) 555-1230	() -	(555) 555-2533	BKC		12/29/2013		ATTORNEY
200009	Sarah	Clark	(555) 555-4500	() -	() -	SS	INI	01/28/2014		ATTORNEY
200010		Geico Insurance Company	() -	() -	(555) 555-6586	DEF	LIT	05/22/2014		ATTORNEY
200010		Medical Care Transport, Inc.	(555) 555-5433	() -	(555) 555-5433	DEF	LIT	05/22/2014		ATTORNEY
200011	Robert	Wilson	(555) 555-8788	() -	() -	CRM		05/26/2014		ATTORNEY
200012	Alex	Webb	(555) 555-5998	() -	() -	WRD	DEM	04/25/2014		ATTORNEY
200070	George	Adams	(555) 555-8245	(301) 466-1446	(555) 555-2344	MVA		10/25/2016		ATTORNEY
200071	Lorelai	Gilmore	() -	() -	() -	DO1		01/27/2017		ATTORNEY
200072	Georgia	Murphy	(555) 555-4932	() -	(555) 555-4932	SS		02/13/2017		ATTORNEY
								Total Clients : 53		
								Total Cases : 62		
(Clients With Multiple Cases Will Appear Multiple Times)										
phone_list_clients_open_cases										



Referral Report with Client Contact Info

Report Name:	referral_report_with_client_info
Report Prompts:	Begin_Opened_Date (Date) End_Opened_Date (Date)
Description:	Lists all client parties in cases opened between date range entered at the prompts. Shows Prefix, First Name, Middle, Last Name, Suffix, Default Address, Default Address2, Default City, Default State, Default Zipcode, Home Phone, Mobile Phone, Date of Birth, Gender, Case Number, Case Type, Class, Date Opened, Close Date, Referred By, Referred To, SSN, Date of Death, AKA Full Name. Sorted by Last Name, First Name. Report Summary includes Total Number of Clients and Total Number of Cases. Clients who have more than one case will appear in multiple rows. Report is best used for exporting to an Excel file.
Orientation:	Landscape

Sample:

5/26/2017

Page 2 of 2

Referral Report with Client Contact Info

For Cases Opened From 01/01/2000 - 12/31/2017

Prefix	First Name	Initial	Last Name	Suffix	AKA Full Name	Address 1	Address 2	City	State	Zip Code	Home Phone	Mobile Phone	DOB	Date Of Death	Gender	SSN	Class	Case	Type	Class	Date Opened	Date Closed	Referred By	Referred To
	Cathy		Macie			1111		Hollywood	MD	(315) 734-0827	(301) 485-1446		10/20/1975			111-23-8555	200347	ODG			07/15/2014		Unknown	Unknown
	Cathy		Macie			1111		Hollywood	MD	(315) 734-0827	(301) 485-1446		10/20/1975			111-23-8555	200348	MVA			11/07/2014		Unknown	Adams, Bank & Cassidy, P.A.
	Cathy		Macie			1111		Hollywood	MD	(315) 734-0827	(301) 485-1446		10/20/1975			111-23-8555	200353	ZST			04/03/2015		Unknown	Unknown
	Cathy		Macie			1111		Hollywood	MD	(315) 734-0827	(301) 485-1446		10/20/1975			111-23-8555	200356	MVA			09/05/2015		Unknown	Unknown
	Cathy		Macie			1111		Hollywood	MD	(315) 734-0827	(301) 485-1446		10/20/1975			111-23-8555	200358	CAT			09/11/2015		Unknown	Unknown
	Cathy		Macie			1111		Hollywood	MD	(315) 734-0827	(301) 485-1446		10/20/1975			111-23-8555	200374	MVA			04/04/2017		Unknown	Unknown
	Rocky		Macie			ford/david		Hollywood	CA	() - () - ()						- -	200387	SEC			09/11/2015		Unknown	Unknown
	Rocky		Macie			ford/david		Hollywood	CA	() - () - ()						- -	200373	MVA			03/20/2017		Unknown	Unknown
Mr. Daniel	Matthew					701 Pross Oaklery Road		Jamsville	MD	21754	(301) 555-0831	() - () - ()	10/23/1941		M	927-65-0381	200332	OT	UT		12/05/2013		Hardwick & Johnson, PC	Unknown
Mrs. Audrey			Marshall			414 Knight Road		Leonardtown	MD	20650	(410) 555-3345	(410) 555-5912	12/18/1942		F	999-55-7777	200338	OT	REG		06/09/2014		Dixon & Camble, LLC	Unknown
Mrs. Catherine	Ann		McRae			122 Crystal Lake Drive		Egg Harbor Township	NJ	08234	(609) 554-4123	() - () - ()			F	959-05-5009	200339	OT	INV		05/09/2014		Dixon & Camble, LLC	Unknown
			Medical Care Transport, Inc.			5152 W. Libson Avenue		Baltimore	MD	21201	(555) 555-5433	() - () - ()			- -	200010	OSP	UT			03/22/2014		Geico Insurance Company	Adams, B.A., Mr. George Tiberius
Mrs. Janet			Moore			3501 Old Court Road		Pikeville	MD	21226	() - () - ()	() - () - ()	08/15/1928	03/01/2003	F	901-05-1235	200343	OT			06/16/2014		Hardwick & Johnson, PC	Unknown
Mrs. George			Murphy			218 Front Street		Orange Mills	MD	21117	(555) 555-4922	() - () - ()			F	555-23-2395	200372	SS			02/15/2017		Needles Case Management	Unknown
Mr. Gabe			Norris			1924 West Avenue		Lake Shore	MD	21122	(555) 555-7192	() - () - ()	02/18/1967		M	- -	200328	IM			06/15/2014		Joss, Sr., Mr. Mark A.	Unknown
Mrs. Beverly			Newton			21314 Grand Baltimore Drive		Tampa	FL	33615	(813) 555-0811	(813) 555-1982	04/12/1951		F	967-65-4321	200340	OT	INV		06/11/2014		Camble, Esq., Mrs. Teresa R.	Unknown
Mrs. Susan	H.		Palmer			503 Leimroest Road		Danbury	CT	06810	() - () - ()	(203) 555-3355	06/28/1951		F	999-05-3212	200337	OT	INV		09/21/2014		Dixon & Camble, LLC	Unknown
Mr. Thomas	K.		Palmer			503 Leimroest Road		Danbury	CT	06810	() - () - ()	() - () - ()	04/25/1948	10/22/2002	M	000-90-5909	200337	OT	INV		09/21/2014		Dixon & Camble, LLC	Unknown
Mr. Elia			Parley		The King	4 Graceford		Memphis	TN	38127	(555) 555-0907	() - () - ()	06/05/1925		M	234-01-5555	200015	CRUI			05/26/2014		Parley, Col. Tom	Unknown
Mrs. Elene	May		Roberts		Toddler Roberts	3500 West Parkway, Suite 402		Parkton	MD	21120	() - () - ()	() - () - ()	11/13/1928		F	555-99-5555	200326	RSC			05/09/2014		Unknown	Unknown
Mr. Joseph	A.		Rose			4154 S. 4th Street		Baltimore	MD	21201	(555) 555-3555	() - () - ()	06/14/1954		M	231-54-5576	200010	OSP	UT		09/23/2014		Geico Insurance Company	Adams, B.A., Mr. George Tiberius
Mr. Ula			South			28 South Street		Orange Mills	MD	21117	() - () - ()	() - () - ()	03/25/1954		F	- -	200322	MGD			05/01/2014		Parley, Mr. Elia	Unknown
Mr. John	G		Trane	Sr.	Jack Trane	5000 Greenway Road		Garrison	MD	21117	(555) 555-2234	() - () - ()	05/11/1955		M	- -	200327	CDN	INR		06/12/2014		Unknown	Unknown
Mrs. Deborah			Wallace			412 Clark Road		Cheneston	WV	25714	(204) 555-7876	() - () - ()	11/20/1945		F	957-54-1234	200341	OT			06/15/2014		Hardwick & Johnson, PC	Unknown
	SUPUS N		WATSONS								() - () - ()	() - () - ()			- -	200384	CDL				10/09/2015		Needles Case Management	Unknown
Mr. Alec	H.		Weld			9020 Greenspring Avenue		Crownville	MD	21032	(555) 555-5555	() - () - ()	11/11/1959	08/11/2003	M	222-23-4444	200012	WRD	OSM		04/25/2014		Gray, Mr. Linda	Unknown
Mr. Alec	H.		Weld			9020 Greenspring Avenue		Crownville	MD	21032	(555) 555-5555	() - () - ()	11/11/1959	08/11/2003	M	222-23-4444	200013	WIC			05/15/2014		Gray, Mr. Linda	Adams, Bank & Cassidy, P.A.
Mr. Alec	H.		Weld			9020 Greenspring Avenue		Crownville	MD	21032	(555) 555-5555	() - () - ()	11/11/1959	08/11/2003	M	222-23-4444	200021	PRG	INR		04/21/2014		Gray, Mr. Linda	Unknown
Mr. Robert	F		Wilson		Bobby Wilson	237 1st Street		Towson	MD	21204	(555) 555-5755	() - () - ()	04/04/1970		M	455-55-4532	200011	CRUI			05/26/2014		RSP - David Walling	Unknown
Mr. Leonard			Wyatt			105 Lynn Drive		Marion	OH	43302	() - () - ()	() - () - ()	01/09/1942	10/01/2002	M	913-00-4011	200328	OT	INV		09/21/2014		Hardwick, Esq., Mr. Charles	Unknown
Mrs. Wendy	C.		Wyatt			105 Lynn Drive		Marion	OH	43302	(740) 555-1234	() - () - ()			F	- -	200328	OT	INV		09/21/2014		Hardwick, Esq., Mr. Charles	Unknown

Total Cases: 95

referral_report_with_client_info