

AB Contact & Person Consumer Privacy Report – Design Notes and Additional Information

PURPOSE:

The purpose of this report is to disclose consumer personal information stored in the Address Book Contact, Company, Person and Company Person Address records associated with active and inactive contacts. The report also searches AP Vendor records for Tax Identification and/or Social Security Numbers on the Vendor Recipient Tax ID field.

The tables included in this report are: AB Person, AB Company Person Address, AB Contact, AB Company, AP Vendor.

SORT ORDER:

Status, Name order. Active contacts will be listed before inactive contacts.

PROMPT FIELDS:

Report Date - Accept the prefilled date (system date) or enter the date that you want to print in the Page Headings

Contact Type - Includes a Dropdown list to select All, Company or Person. This is used to filter the information returned by Contact Type.

Contact Name - Enter the Name exactly how it is set up on the AB Person Full Name or AB Company Name field record. For example Person Full Name in Address Book, Setup , Person is "Erickson, John", type "Erickson, John" into the prompt field. If the Person Full Name in Address Book, Setup, Person is "John Erickson", type "John Erickson" into the prompt field. Leave this prompt field blank to display all Contacts

CONDITIONS:

1. CND - Contact Type: Option to include ALL, Person or Company
2. CND -Contact Name: Option to enter the exact name of the contact for which you to return information.
3. Contact Type not equal to Group. This excludes the "Group" Type contacts from the report.

ABOUT THE INFORMATION INCLUDED:

The report looks for personal information stored on each AB- Contact, Person, Company and Company/Person Address record. The report will return a Yes or a No response depending on how the fields in the Address Book records are populated.

Name: AB - Person Name (Full Name) or AB - Company Name depending on Contact Type

Status: If the Contact type record is not flagged as inactive, "Active" is returned. If flagged as inactive, "Inactive" is returned

Telephone (Tel?): Searches the following fields for telephone numbers:

AB Person record: Business Phone, Mobile Phone, Person Phone 1, Person Phone 2,

AB Company record: Primary Phone, Company Phone 1. Company Phone 2. Company Phone 3. If data is found to be populated in any of the above phone number fields the word "Yes" is returned, otherwise the word "No" is returned.

Email (Email?): Searches to determine if any of the following fields are populated: AB Person Email Address, AB Company E-mail Address, AP Vendor 1099 Recipient E-mail. If any of these fields are populated the word "Yes" is returned, otherwise the word "No" is returned. Note: Since this is a text field, if the field is not blank, the formula assumes that there is an email address stored in that field even if the data in the field is not in valid email format.

IMPORTANT: If using custom fields on AB Person, AB Company Person Address, AB Contact, AB Company, AP Vendor records to store additional personal information, the report will need to be modified to include that information. Contact your certified Sage 300 CRE consultant or a Report Designer expert to make the changes.