RUNNING CONTACT SENSITIVE REPORTS IN ADVANCE WEB (Such as PF-001 and PF-003)

1. Go to UCD Entity Lookup on the left toolbar

2. Search for an entity by name or ID number
3. In Entity Overview top header bar, Go to Actions, Reports

4. PF-001 and PF-003 are located here. Pull them up by clicking on the ellipse (“…” icon”).

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This is the list of reports that apply to your current context. When you run a report from this list, the report generated will be for the specific records you are viewing.

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