

# Fast•Class File

SmartOffice

## Volume 24: Building Filters for 70 1/2

One way of building a filter that will find all contacts turning 70½ years old in the current year, is to build a filter that will find all contacts with a seventieth birthday during the latter half of the previous year or the first half of the current year.

This example will demonstrate how to build a filter that will look seventy years in the past to find all contacts with an actual date of birth in the latter half of 1933 or the first half of 1934. All contacts meeting this criterion will turn 70½ years old during the year 2004.

To build a filter that will search for all contacts turning 70½ during the year of 2004 –

- Select **Marketing** in the main menu and then select **Filters**.
- In the **Search Filters** screen, click **Add**.
- Select the **Contact-Individual** category. Click **OK**.

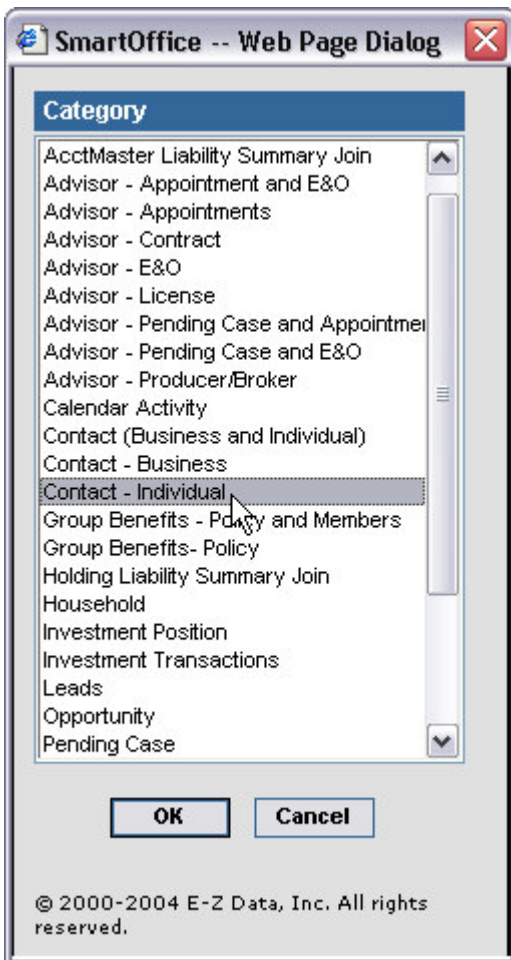


Figure 1: The Filter Category screen (Contact-Individual category selected).

- In the **Filter Setup** screen, click the **Add** button in the **Filter Items** section.
- In the **Filter Criteria** screen, select the **Personal** table in the **Tables Available** section and the **DOB** (Date of Birth) column in the **Columns Available** section.
- Select the **Advanced** operator in the **Operator** field drop down.

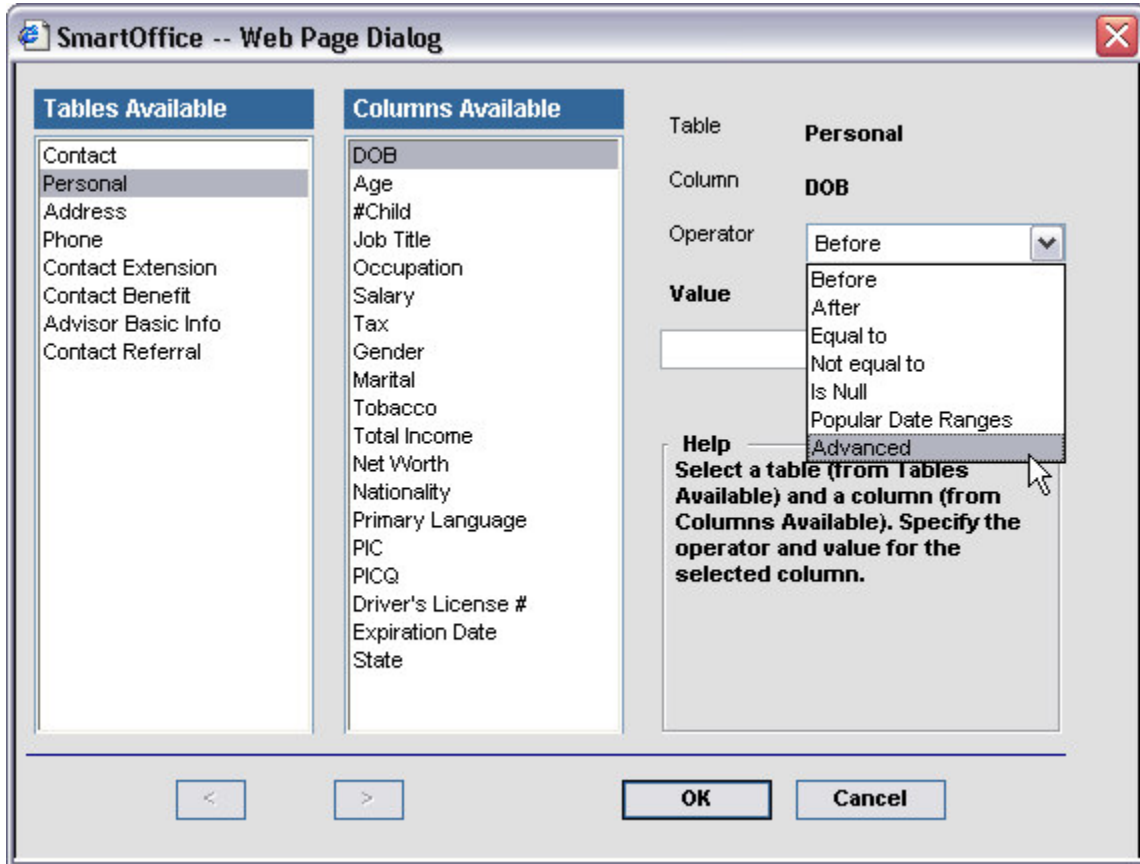


Figure 2: The Filter Criteria window (DOB column selected and Advanced Operator highlighted.)

- In the **Advanced Date Filter** screen, select the **Date Range Operations** condition in the **Select Conditions to Apply** section.
- Click the **Down Arrow** to move the condition into the **Description** section.
- Click the condition hyperlink (**within date range**) to create the filter description.
- Click the **Calendar** button to the right of the **From** field and use the **Calendar** tool to set **July 1, 1933** as the beginning of the range.
- Click the **Calendar** button to the right of the **To** field and use the **Calendar** tool to set **June 30, 1934** as the end of the range.

This range will find all contacts turning 70 years old in the latter half of 2003 or the first half of 2004, effectively generating a list of contacts turning 70½ years old during the year 2004.

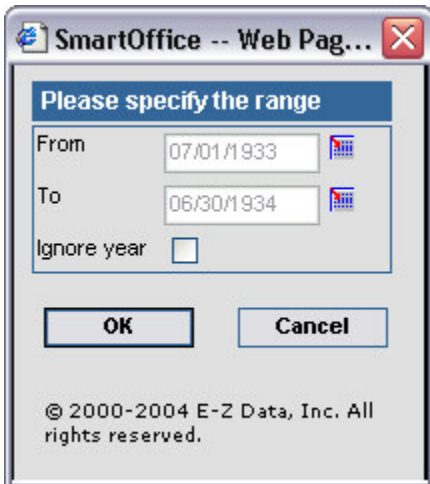


Figure 3: The Date Range tool for the Advanced Filter Criteria window (range for all contacts turning 70½ during 2004 selected.)

- Click OK.
- Filter description selections will be reflected in the **Descriptions** section of the **Advanced Date Filter** screen.

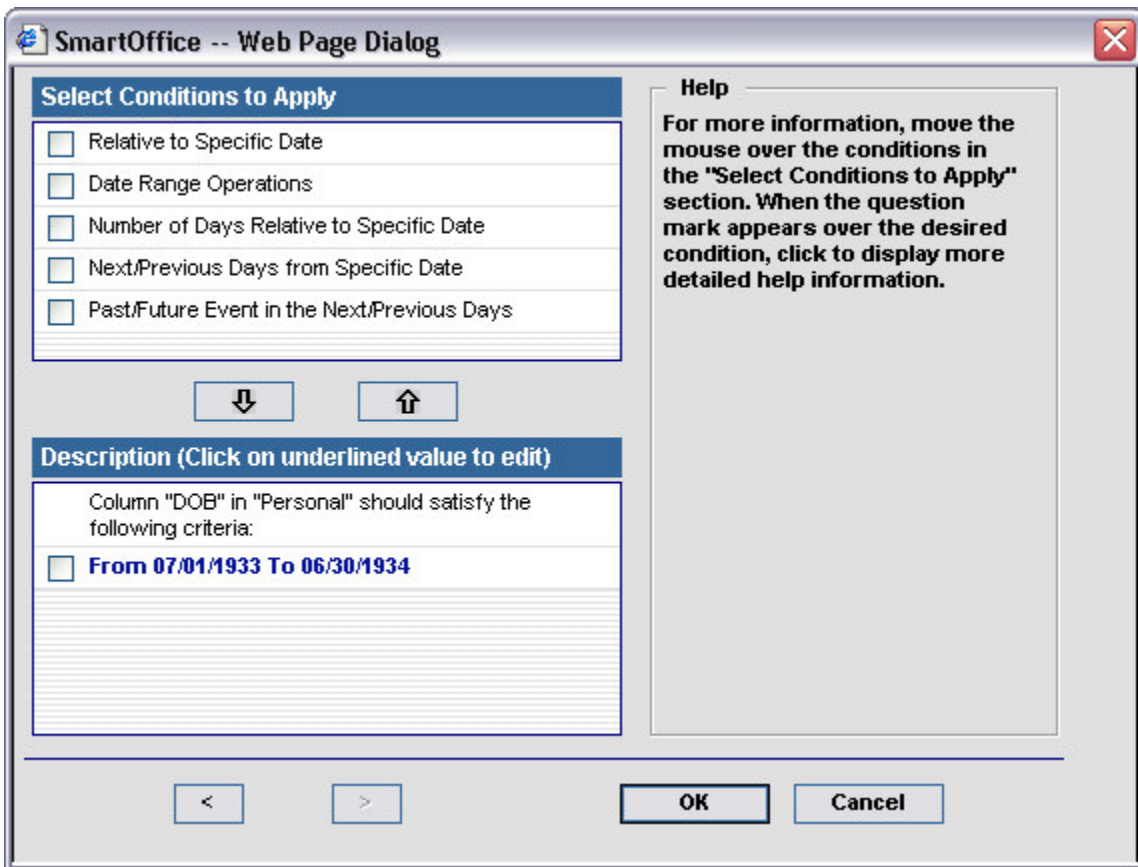


Figure 4: Date range selections displayed in the Advanced Date Filter screen.

- If the filter description is correct, click **OK**.
- Give the filter a name and a description in the **Filter Setup** screen.

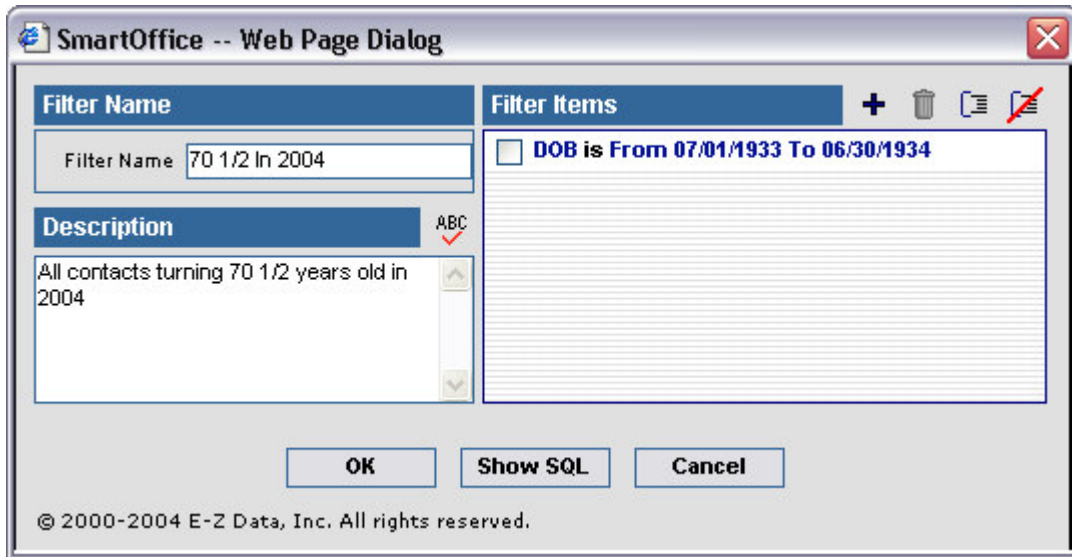


Figure 5: The Filter Setup screen (filter criteria added).

- Click **OK**.

The new filter can now be employed in a Contact search or as part of dynamic report to find all contacts turning 70½ in the year 2004.

Contact Name	Type	Age	DOB	All Addresses	All Phones
<input type="checkbox"/> Adams, William	Client	70	02/14/1934	Residence - 5321 El Molino St., Pasadena, CA 91051	Business Fax - (626) 585-3550 Residence - (626) 512-1231
<input type="checkbox"/> Anthony, Brian	Client	70	12/12/1933	Residence - 3333 San Pasqual, Pasadena, CA 91107 Business - 12 E. Colorado Blvd., Pasadena, CA 91107 Business - 12 E. Colorado Blvd., Pasadena, CA 91107	Residence - (626) 792-2201 Business - (818) 388-7111
<input type="checkbox"/> Brooks, Stephen	Client	70	11/01/1933	Residence - 630 S. Oak Knoll Pasadena, CA, 91107 (626)-798-6645	Residence - (626) 795-0928
<input type="checkbox"/> Chung, Harold	Client	70	02/07/1934	Residence - 4131 Bernice Ave., Los Angeles, CA 90031 Business - 20225 S. Western Ave., Los Angeles, CA 90005	Residence - (323) 532-1542 Business - (213) 989-0433 Mobile - (310) 765-2022
<input type="checkbox"/> Farmer, Eileen	Client	70	09/20/1933	Residence - 830 E.Hermosa Dr., San Gabriel, CA 91776 Business - 1111 Sunset Blvd., Los Angeles, CA 90006	Residence - (626) 280-3288 Business - (213) 274-6275
<input type="checkbox"/> Polster, Karen	Client	70	05/16/1934	Business - 1107 Sunset Blvd. Suite 101, West Hollywood, CA 90046 USA	Business - (310) 487-9995 Business Fax - (310) 254-8879
<input type="checkbox"/> Tarumoto, Lucy	Client	70	03/12/1934	Residence - 348 E. Gleason, Monterey	Residence - (626) 736-1420

Records Shown: 7 Total Records: 7

Figure 6: Contact search results using the 70½ in 2004 filter.