

# Fast•Class File

SmartOffice

## Volume 23: Building Filters for the Half

One way of searching for contacts that will reach a specific 'half' age in a given month is to create a dynamic report with two filters: one filter to find all contacts of a specific age and a dated filter to find all contacts with a birthday occurring six months from the current month. Both sets of criteria can be combined in one filter, however, separating the criteria into two separate filters allows for greater flexibility should criteria from only one of the filters be needed for future data mining.

To build a filter that will search for all contacts of a specific age –

- Select **Marketing** in the main menu.
- Select **Filters**.
- In the **Search Filters** screen, click **Add**.
- Select the **Contact-Individual** category.
- Click **OK**.
- 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 **Age** column in the **Columns Available** section.
- Select **Equal to** as the operator in the **Operator** field drop down.
- Enter the selected age in the **Value** field (for this example, the age is 64).

Tables Available	Columns Available	Table	Column	Operator	Value
Contact	DOB	Personal	Age	Equal to	64
Personal	Age				
Address	#Child				
Phone	Job Title				
Contact Extension	Occupation				
Contact Benefit	Salary				
Advisor Basic Info	Tax				
Contact Referral	Gender				
	Marital				
	Tobacco				
	Total Income				
	Net Worth				
	Nationality				
	Primary Language				
	PIC				
	PICQ				
	Driver's License #				
	Expiration Date				
	State				

Figure 1: The Filter Criteria screen.

- Click **OK**.
- Give the filter a name and a description in the **Filter Setup** screen.

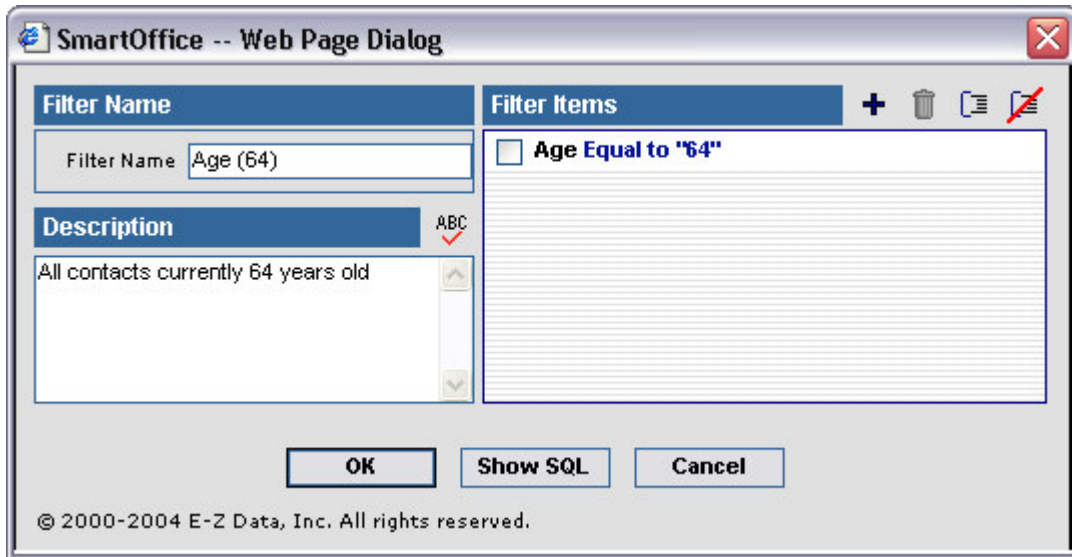


Figure 2: The Filter Setup screen.

- Click **OK**.

To build a filter that will search for all contacts with a birthday occurring six months from the current month –

- Select **Marketing** in the main menu.
- Select **Filters**.
- In the **Search Filters** screen, click **Add**.
- Select the **Contact-Individual** category.
- Click **OK**.
- In the **Filter Setup** screen, click the **Add** button in **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.
- In the **Advanced Date Filter** screen, select the **Number of Days Relative to Specific Date** condition in the **Select Conditions to Apply** section.
- Click the **Down Arrow** to move the condition into the **Description** section.
- Use the separate hyperlinks (**number of days**, **relative to**, and **specific date**) to create the filter description.

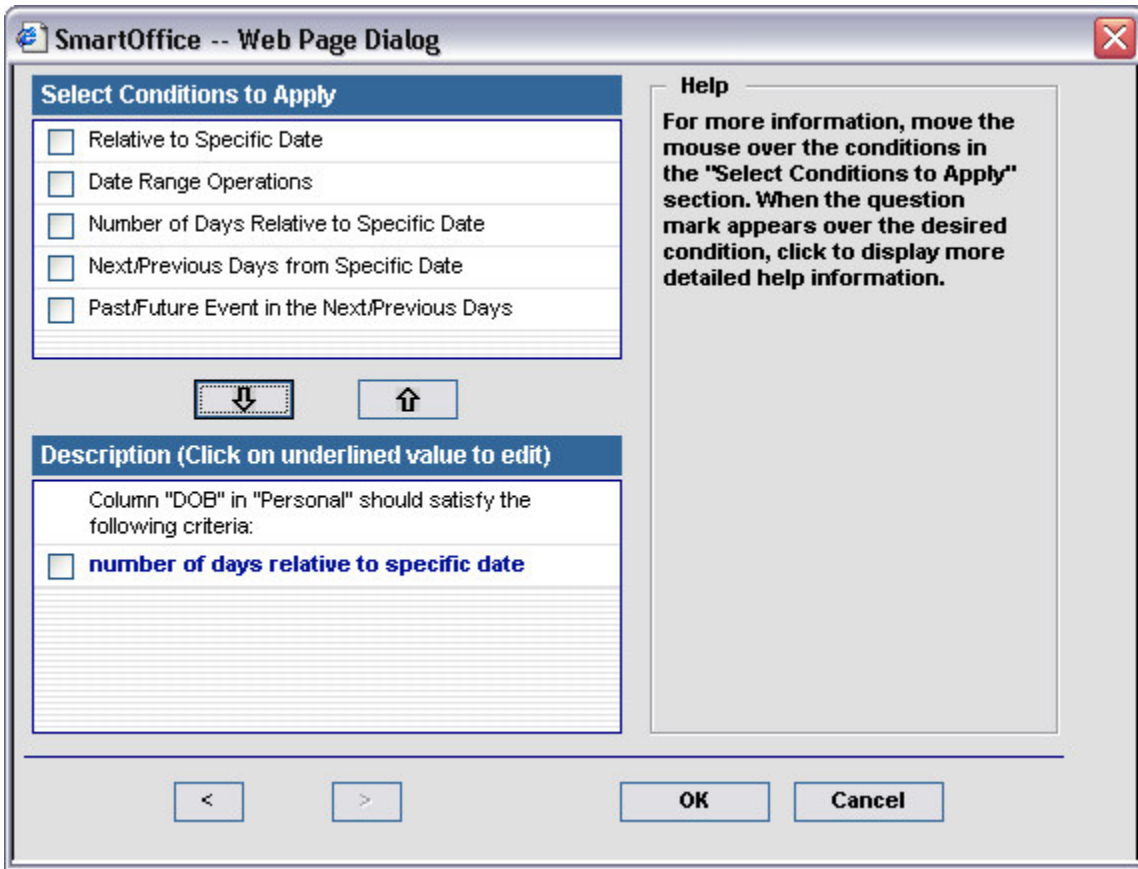


Figure 3: The Advanced Date Filter screen.

- Select the **number of days** hyperlink. Enter **6** in the **Value** field, select the **Month** option, and click **OK**.

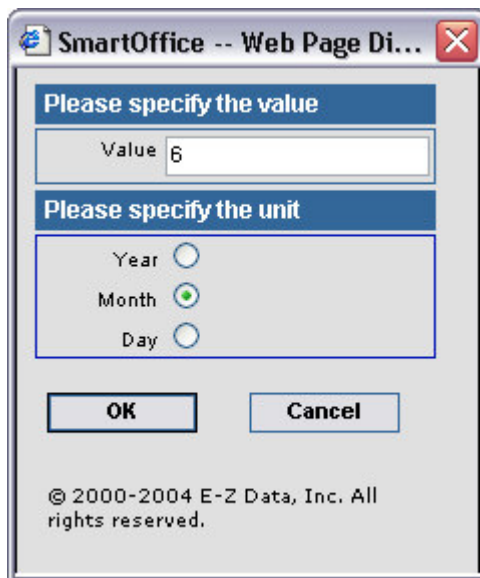


Figure 4: Value and Unit options for the Number of Days portion of the advanced date filter.

- The **relative to** hyperlink will change to a **Before** hyperlink. Select the **Before** hyperlink. Select the **After** option and click **OK**.

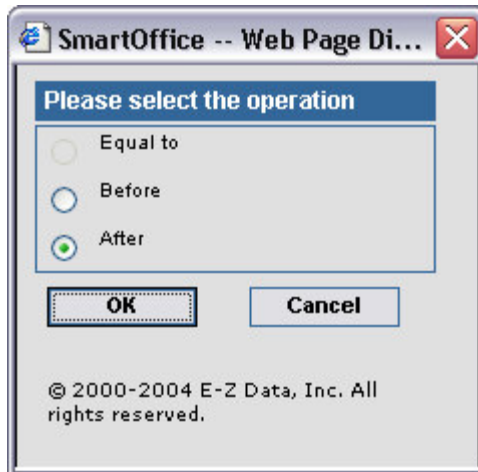


Figure 5: Operation options for the Relative To portion of the advanced date filter.

- The **specific date** hyperlink will change to a **Today** hyperlink. Select the **Today** hyperlink. Select **ignore** in the **Year** and the **Day** drop down fields. Leave the **This Month** option selected in the **Month** drop down. Click **OK**.



Figure 6: Date options for the Specific Date portion of the advanced date filter.

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

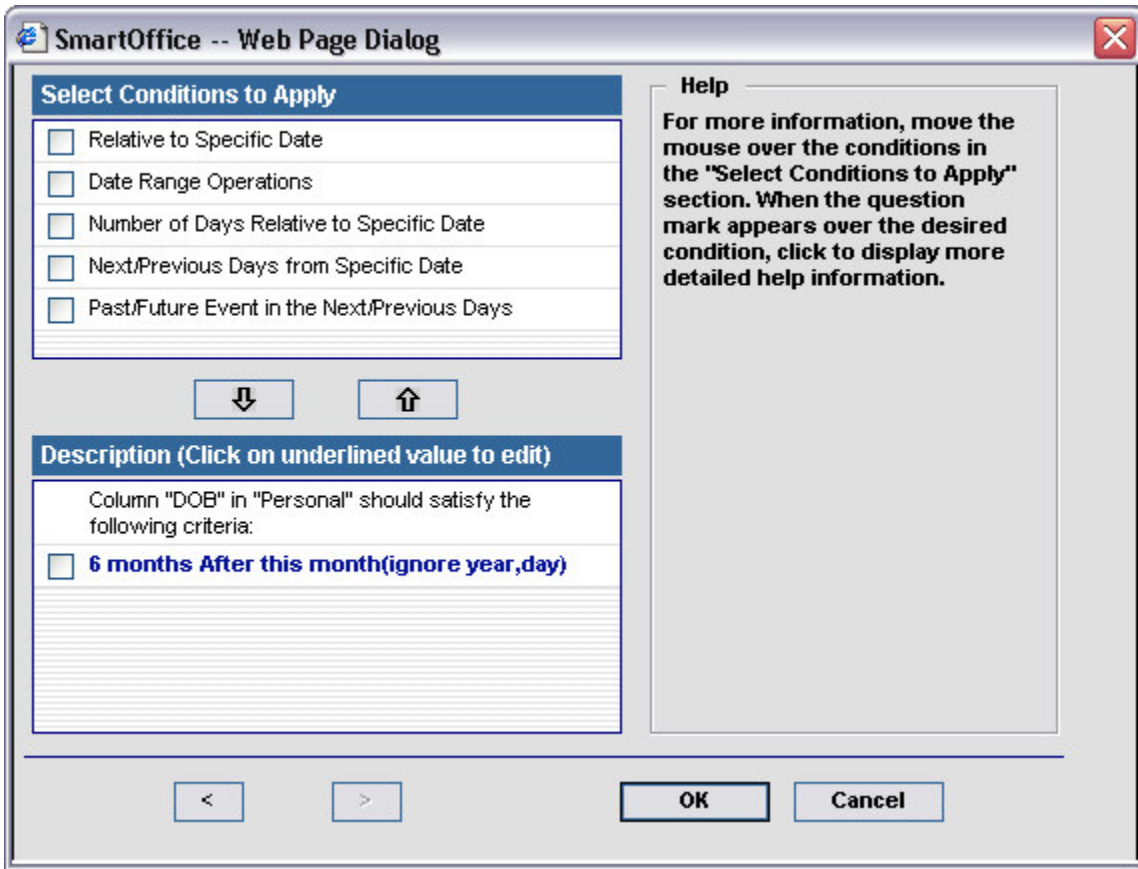


Figure 7: Advanced Date Filter screen (date filter options selected).

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

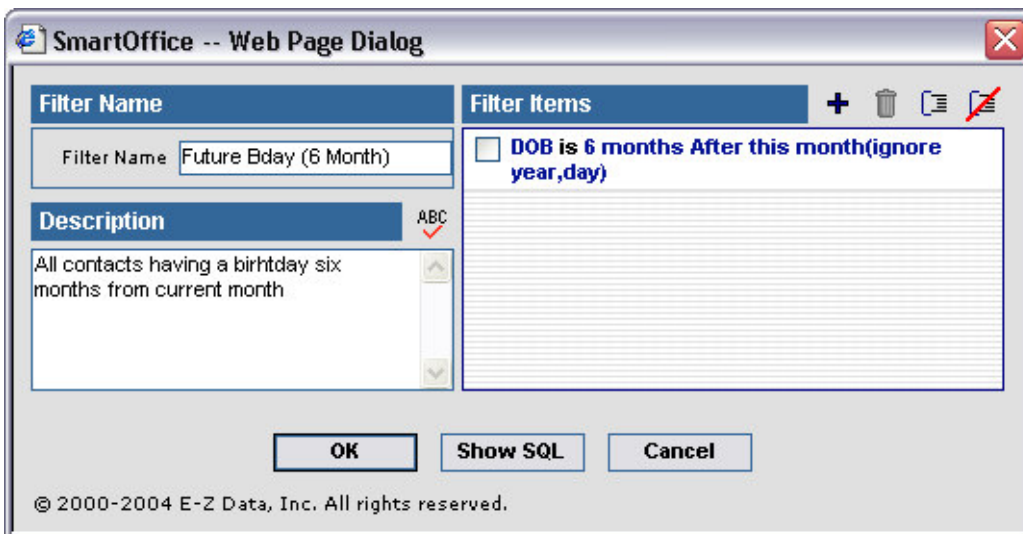


Figure 8: The Filter Setup screen (filter criteria added).

- Click **OK**.

To create a dynamic report with filters that will find all contacts who will turn 64 ½ in the current month –

- Select **Marketing** in the main menu.
- Select **Dynamic Reports**.
- Click **Add** in the **Search Dynamic Reports** screen.
- Select the **Contact-Individual** category.
- Click **OK**.
- Select columns in the **Columns Available** tab of the **Dynamic Report Setup** screen.

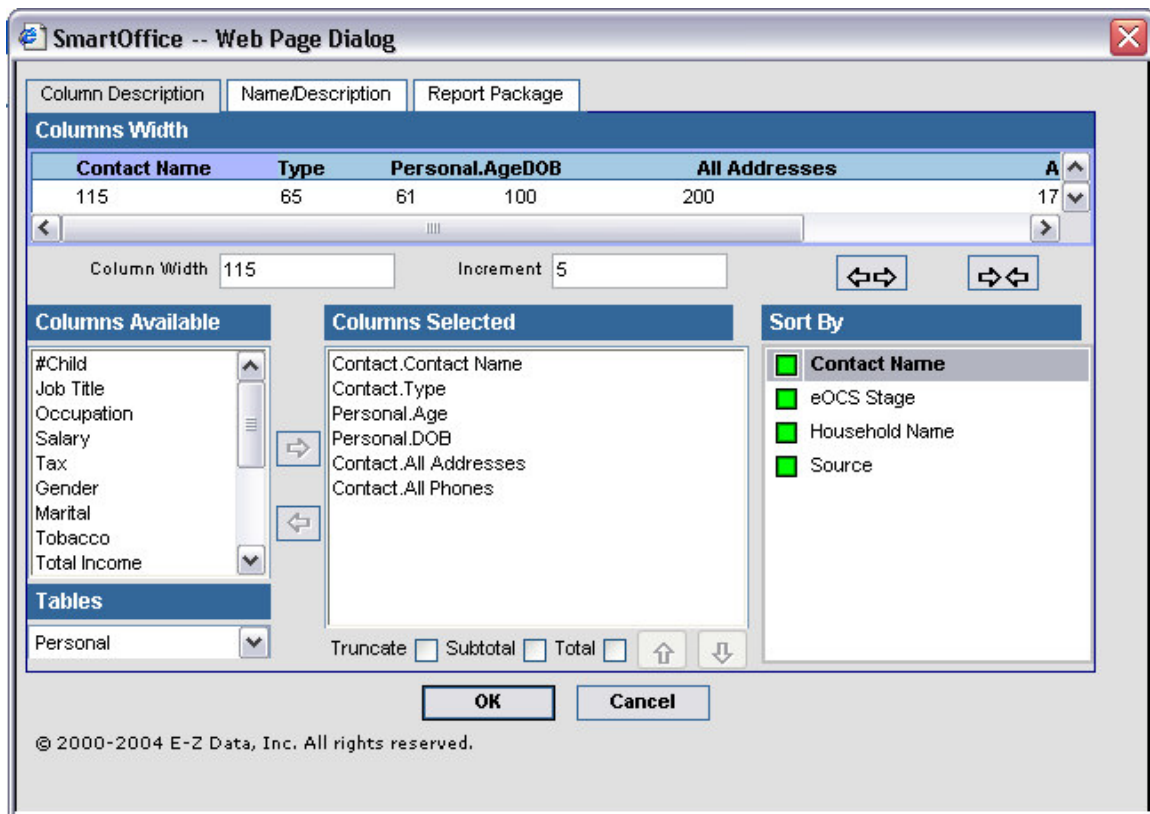


Figure 9: The Column Description tab of the Dynamic Report Setup screen.

- Click the **Name/Description** tab to add filters to the dynamic report.
- Click the **Add** button in the **Selected Filter List** section.
- Search for the filter that will find all contacts currently 64 years old (**64 (age)**).
- In the filter summary screen, tag the **64 (age)** filter and click **OK** or click on the hyperlink of the **64(age)** filter.
- Click the **Add** button in the **Selected Filter List** section.
- Search for the filter that will find all contacts with a birthday occurring six months from the current month (**Future Bday (6 month)**).
- In the filter summary screen, tag the **Future Bday (6 month)** filter and click **OK** or click on the hyperlink of the **Future Bday (6 month)** filter.
- SmartOffice will automatically assign a linking operator between the two filters. By default, the linking operator is an **And** operator. The linking operator can be

changed to **Or** by clicking directly on the operator. Leave the linking operator set to **And**.

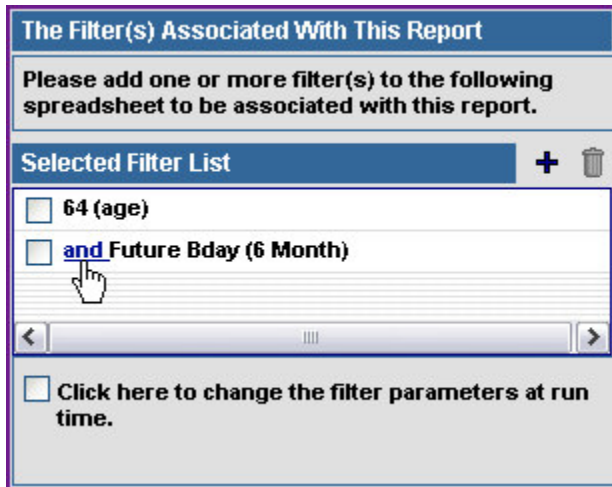


Figure 10: The Selected Filter List section of the Name/Description tab with filter linking operator.

- Give the dynamic report a name and description on the **Name/Description** tab.
- Use the options on the **Report Package** tab to link the dynamic report to a form letter, activity, or campaign.

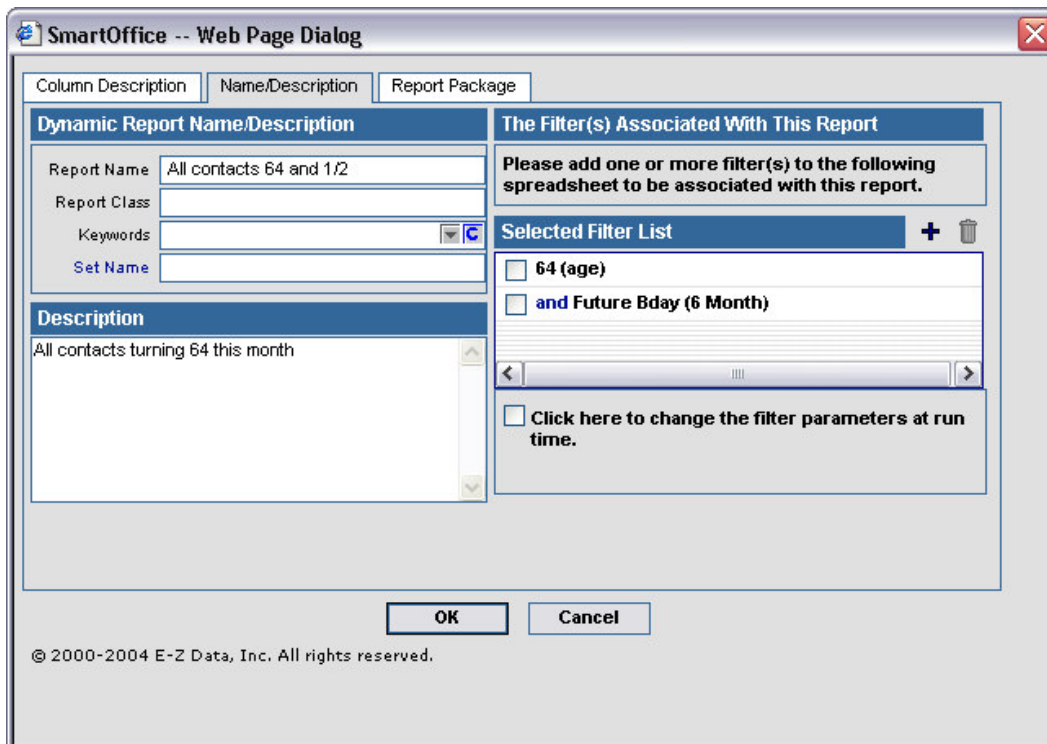


Figure 11: The Name/Description tab of the Dynamic Report Setup screen.

- When finished setting options, click **OK** in the **Dynamic Report Setup** screen.



To run the dynamic report with filters that will find all contacts who will turn 64 ½ in the current month –

- Select **Marketing** in the main menu.
- Select **Dynamic Reports**.
- Enter search criteria for the report in the Search **Dynamic Reports** screen and click **Search**.
- Tag the selected dynamic report (**All contacts 64 ½**) in the Dynamic Report Summary screen and click the **Run Report** button or click on the **All contacts 64 ½** hyperlink.
- SmartOffice will display a summary list of contacts meeting the report criteria.

Contact Name	Type	Age	DOB	All Addresses	All Phones
<input type="checkbox"/> Gibbs, Jeff	Client	64	03/25/1940	Residence - 1945 Devon Place, Diamond Bar, CA 91765 USA Business - 4523 Hill St., Los Angeles, CA 91106	Business - (626) 958-6432
<input type="checkbox"/> Gutierrez, Frank	Client	64	03/15/1940	Residence - 1900 Cloverleaf Lane, Pasadena, CA 91107	Residence - (626) 598-6589
<input type="checkbox"/> Hwang, Julie	Client	64	03/15/1940	Business - 234 S. Hawthorne Blvd, Palos Verdes, CA 90023	Business - (310) 377#6594
<input type="checkbox"/> Koster, Craig	Client	64	03/05/1940	Business - 1107 Sunset Blvd., West Hollywood, CA 90046 USA	Business - (310) 487-9995
<input type="checkbox"/> Ortega, Miguel	Client	64	03/02/1940	Residence - 5333 San Pasqual Pasadena, CA, 91107 (626)-792-2202	
<input type="checkbox"/> Powers, Melinda	Client	64	03/23/1940	Business - P.O. Box 1190, Seal Beach, CA 90740 Business - P.O. Box 1190, Seal Beach, CA 90740	Business - (714) 583-2817
<input type="checkbox"/> Solito, Edward	Client	64	03/10/1940	Business - P.O. Box 405, Yorba Linda, CA 92885 Residence - 864 N. Montebello Blvd., Montebello, CA 90640	Residence - (323) 723-3909 Business - (714) 554-8706 Corporate Office - (213) 733-0388
<input type="checkbox"/> Sollert, James	Client	64	03/08/1940	Business - 987 E. 21st Street, Los Angeles, CA 90024 USA Residence - 2216 Victoria Ave., Venice Beach, CA 90291	Business - (626) 987-7288 Residence - (310) 390-7502
<input type="checkbox"/> Whittaker, Florence	Client	64	03/19/1940	Business - 9909 Davis Lane, Los Angeles, CA 90038 USA	Business - (323) 699-6855

Records Shown: 9 Total Records: 9

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Figure 12: Search results for the All Contacts 64 ½ dynamic report.