

Fast•Class File

Client Data System

Volume 29: Filter and Sets ComboBoxes

Before the Filter and Sets ComboBoxes can be used, the option must be turned on in the User Profile.

To access the User Profile –

- From the main screen in CDS, select the **Database** menu and click **Modify Current Users Profile**.
- When the User Profile opens, click on the **Contact Record** tab.
- In order for the **Show Sets ComboBox** and **Show Filter ComboBox** options to be available, the **Show Indicators Option** in the **Contact Record Options** section of the **Contact Record** tab must be turned on.



- The **Show Sets ComboBox** and **Show Filter ComboBox** options are located in the **Indicator Options** section of the **Contact Record** tab.



- To turn the ComboBox options on, place a check in the boxes to the left of the **Sets** and **Filter ComboBox** options.
- Click **OK**.

*Note: If you have made a change to the User Profile, you will need to log out of CDS in order for the changes to take effect. If you have not made changes, click **OK** when prompted to log out and continue working.*

After the options to use the **Sets** and **Filter ComboBoxes** have been turned on, two new drop-down fields will appear in the indicator bar at the bottom of the CDS screen when a contact summary screen is loaded: one for Sets and one for Filters.



The ComboBoxes can be used to refine a contact search after a summary screen has been loaded.

To view the members of set in the contact summary screen:

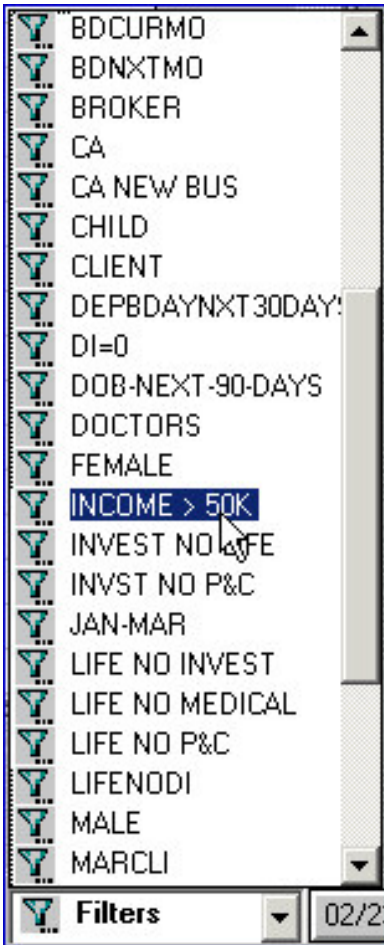
- Click on the drop-down arrow in the **Sets ComboBox** drop-down field.
- Select the set with the membership to be viewed in the contact summary screen.



- The **Contact** summary screen will be reloaded with the membership of the selected set.

You can further refine your **Contact** summary view by applying the filter criteria of a saved filter to the set membership in view.

- With the set membership in view (the name of the set will be reflected in the Sets drop-down field and in the heading of the **Contact** summary screen), click on the drop-down arrow in the **Filters** drop-down field.
- Select the filter with the filter criteria to be applied to the set membership.



- The list of contacts in the **Contact** summary screen will be reloaded based on the combination of set membership and filter criteria.
- The combination of set membership and filter criteria will be reflected in the **Sets** and **Filters ComboBox** fields.



The list of contacts in the **Contact** summary screen will be reloaded with every change made to the **Sets** and **Filter ComboBox** fields. For instance, to see which members of a set meet different filter criteria, leave the entry in the **Sets ComboBox** field static and change the entry in the **Filter ComboBox** field. To see which set members of a different set meet the same filter criteria, leave the entry in the **Filter ComboBox** field static and change the entry in the **Sets ComboBox** field.