Fast-Class File

Client Data System

Volume 51: System Filters

System filters can be used to search for contacts based on
- Zip/Postal Code Information
- Phone Number
- Policy Number
- Total Family Income (greater than or equal to a specific value)

To use the Zip/Postal Code system filter –

- Click the **Contact** button in the toolbar of the CDS main screen or click the **Find** button on the toolbar of a **Contact** summary screen or the toolbar of a **Contact Record**.
- In the **Find Contact Information** window, click the drop-down in the **System Filters** field and select the **Zip Code/Postal Code** option.
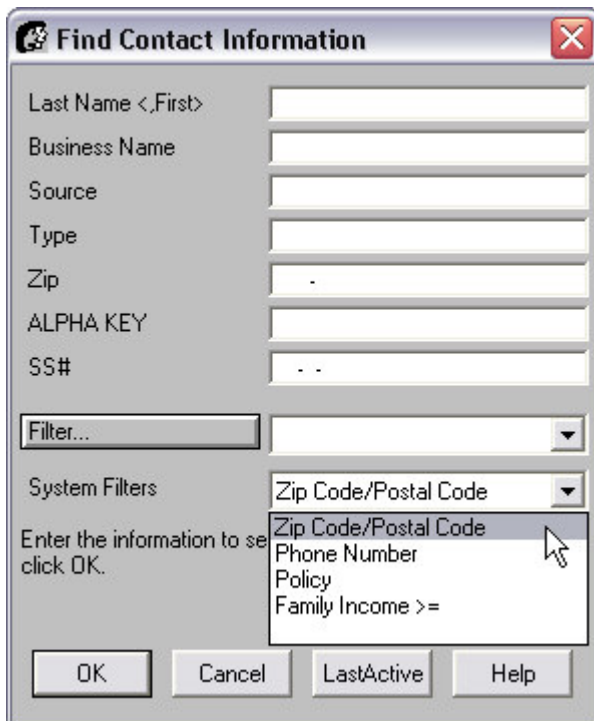

Figure 1: The Find Contact Information window (Zip Code/Postal Code System Filter selected).
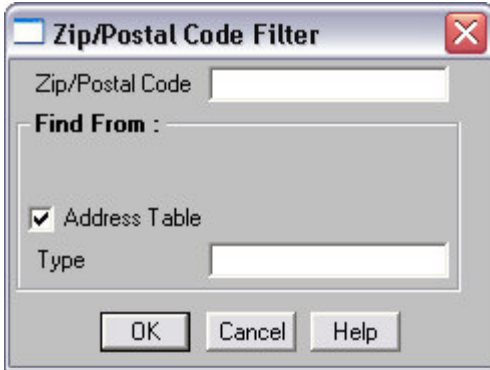
- Click **OK**.

Figure 2: The Zip/Postal Code Filter window.

- In the **Zip/Postal Code Filter** window, enter the zip or postal code in the **Zip/Postal Code** field.
- To limit the search to a specific type of address, left click in the **Type** field to activate the **Type** drop-down and select an address type from the available options.
- Click **OK** to perform the search based on entered criteria.

To use the Phone Number system filter –

- Click the **Contact** button in the toolbar of the CDS main screen or click the **Find** button on the toolbar of a **Contact** summary screen or the toolbar of a **Contact Record**.
- In the **Find Contact Information** window, click the drop-down in the **System Filters** field and select the **Phone Number** option.
- Click **OK**.
- In the **Phone Filter** window, enter the phone number. *Note: Parenthesis and hyphens are part of a field mask to ensure proper formatting. Only the phone number itself needs to be added.*

Figure 3: The Phone Filter window (with Phone Filter field mask).

- Click **OK** to perform the search based on entered criteria.

To use the Policy Number system filter –

- Click the **Contact** button in the toolbar of the CDS main screen or click the **Find** button on the toolbar of a **Contact** summary screen or the toolbar of a **Contact Record**.
- In the **Find Contact Information** window, click the drop-down in the **System Filters** field and select the **Policy** option.

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- Click **OK**.

Figure 4: The Policy Filter window.

- Enter the number of the policy in the **Policy #** field.
- Define the role of the contacts associated with the policy to be searched for by selecting the appropriate options in the **By Role** section. For example, to search for the beneficiary of a policy, enter the policy number in the **Policy #** field and select the **Beneficiary** option. Use the **Select All** button to select all role options. Use the **Deselect All** button to reset role options to null if all role options are selected.
- Click **OK** to perform the search based on entered criteria.

To use the Family Income system filter –

- Click the **Contact** button in the toolbar of the CDS main screen or click the **Find** button on the toolbar of a **Contact** summary screen or the toolbar of a **Contact Record**.
- In the **Find Contact Information** window, click the drop-down in the **System Filters** field and select the **Family Income >=** option.
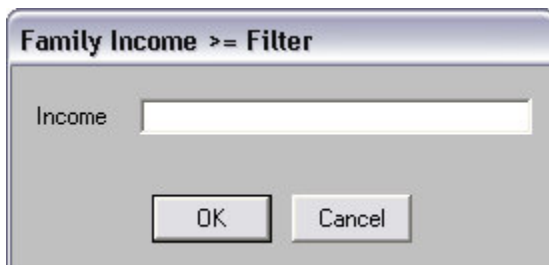- Click **OK**.

Figure 5: The Family Income >= Filter window.

- Enter the income amount in the **Income** field.

*Note: Family income is calculated by adding the income amounts entered for all contacts linked as family members on the **Key Relations** tab. For instance, if a husband and wife both have an income, the income amount entered on the **Additional Personal** tab for each record will be calculated for use with the **Family Income >=** filter, provided that the husband and wife are linked together on the **Key Relations** tab. Only the contact record identified as the **Head of Household** will be displayed in the summary of contacts meeting the search criteria.*

- Click **OK** to perform the search based on entered criteria.