# Fast·Class File

Enterprise CRM Platform
Volume Three: Advanced Date Filters

For this example, we will use the **Advanced Date Filter** tool to build a filter that will find all policies in ECP with an anniversary date occurring in the next 30 days.

To create a new filter, select **Marketing** in the main menu then click on **Filters**. From the **Search Filters** screen, click on the **Add** button. In the **Category** window, select the category containing the fields to be included in the filter. Click **OK**. For this example, we selected the **Insurance Policy** category. In the **Filter** dialogue window, enter a filter name then click the **Add** button in the **Filter Items** section.
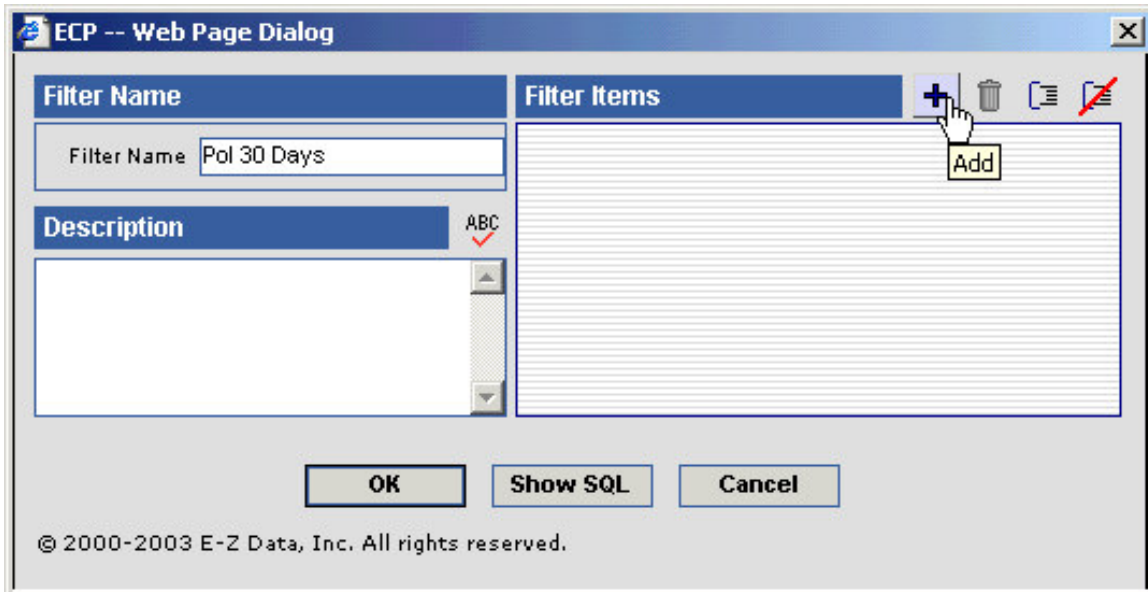

In the **Tables Available** section of the **Filter** criteria window, select the table with the field/column to be filtered. Once you have selected the table, select the field/column in the **Columns Available** section. For this example, we have selected the **Policy** table and the **Policy Date** column/field.

There a number of unique operators available for date filters. You can build a filter to look for dates before, after, equal to, or not equal to a specific date. When using one of these four filters, use the **Calendar** tool to the right of the **Value** field to select a specific date for the filter. You can select the **Is Null** operator to find all instances of a date field with no data entered. The **Popular Date Ranges** operator allows you to choose from a number of preset values such as Month to Date, Year to Date, First Quarter, and so on.
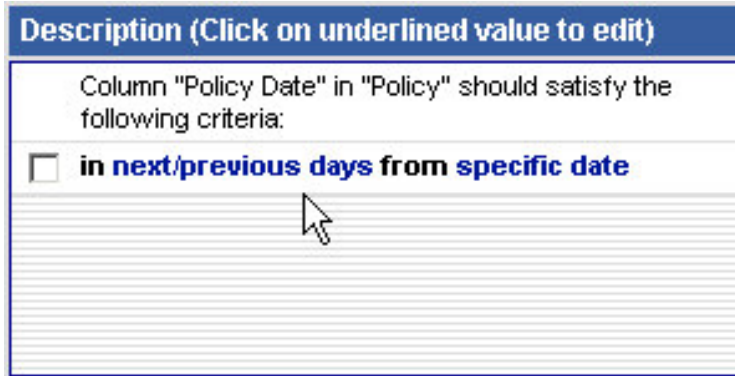
To create the filter that will find all of the policies in ECP with a maturity date in the next 30 days, select the **Advanced** operator.
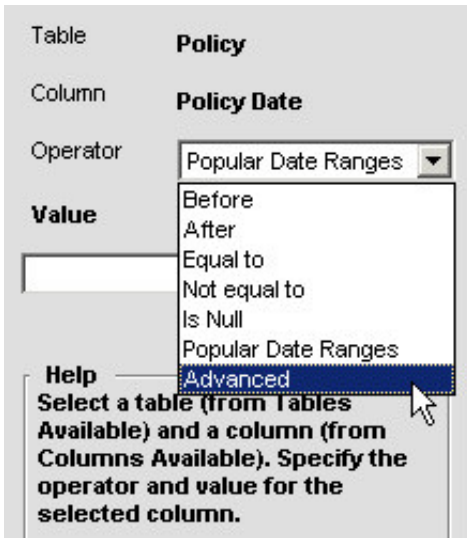
Five filter conditions are available in the **Advanced Filter** dialogue window. For information on how to use a specific condition, position your cursor over the desired condition. The cursor will turn into a cursor with a question mark. Left-click on the condition and the **Help** section will display a brief description and example of what the condition can do.
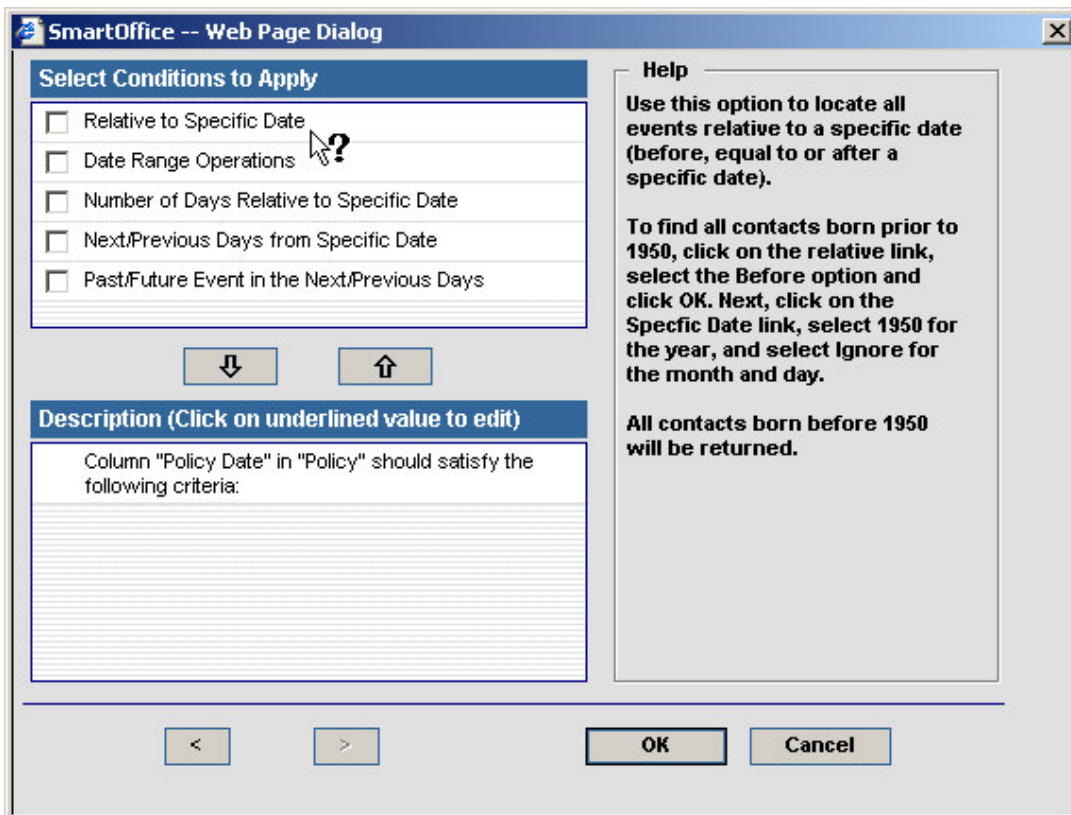
To create a filter for all policy anniversary dates occurring in the next 30 days, put a check in the box to the left of the **Next/Previous Days from Specific Date** condition. Click the down arrow to move the condition into the **Description** section.

Use the hypertext links in the **Description** section to set the values of the filter. Click on the **next/previous days** hypertext link to enter the number of days in the future or in the past relative to the specific date of the filter. For this example, we have entered 30 in the **Number of Days** field and selected the **Next** radio button to set the first part of our filter value – Next 30 days. Click **OK**.


Now we'll set the second part of the value – the specific date. Click on the **Specific Date** hypertext link. The **Specific Date** portion of the value is defined by three pieces of information: the year, the month, and the day. By default, the date is set to today (This Year, This Month, and This Day). If no changes are made, the filter will ignore all policies written previous to this year. Select **Ignore** in the **Year** pull down to select policies regardless of the year they were written.
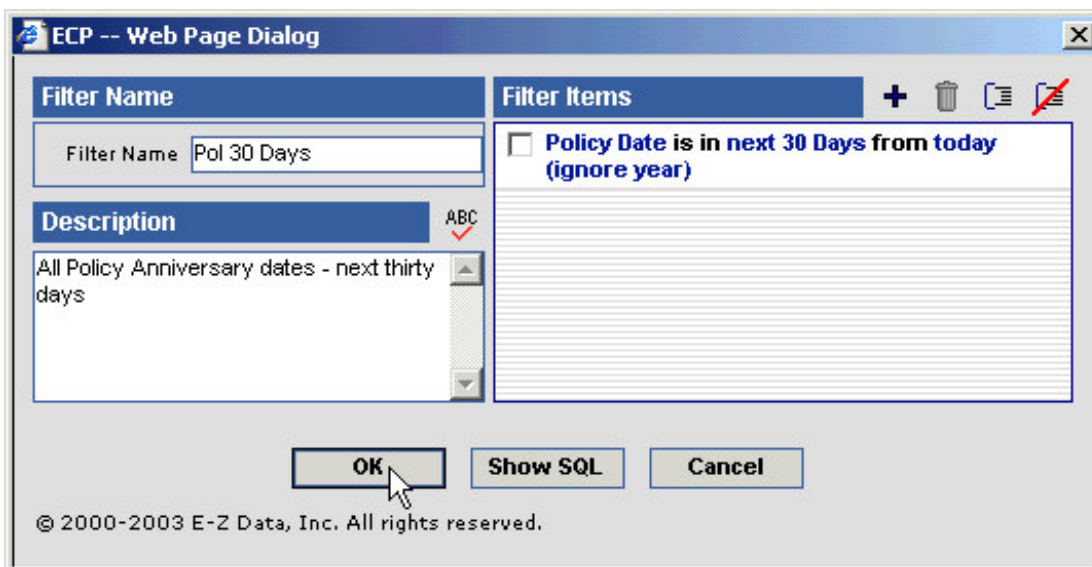
The **Year**, **Month**, and **Day** pull-downs can also be set to search for the previous, next, or a specific year, month, or day. With the date pull downs set, click **OK**.

The **Description** section of the **Advanced Date Filter** window will reflect your choices.
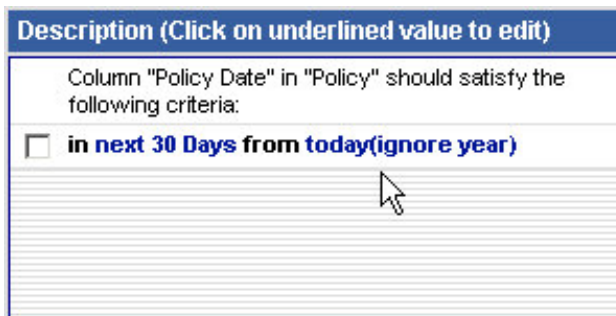
Click **OK** in the **Advanced Filter** dialogue window. Add a description to the filter and click **OK**.
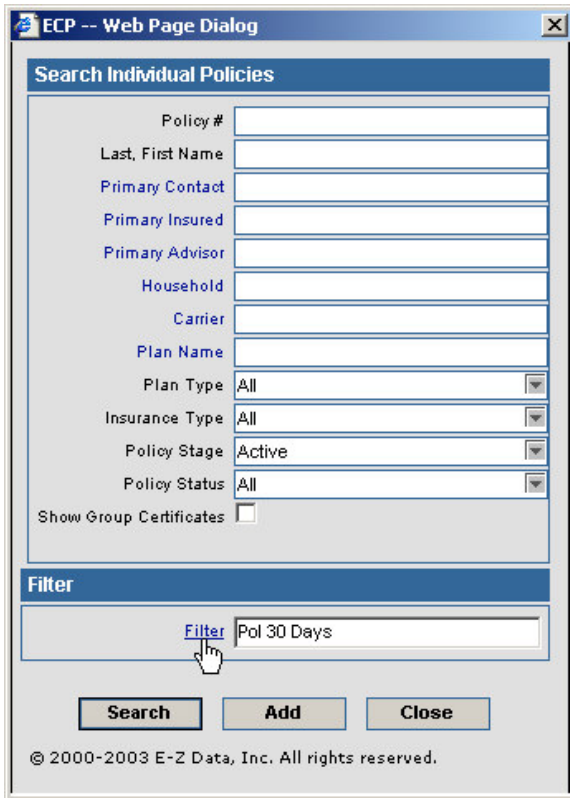

*Note: The criteria of the **Advanced Date** filter item can be adjusted from within the **Filter** dialogue window by clicking the hypertext links in the **Filter Items** section.*

More filter items can be added to perform a more focused search. You can add filter items by clicking on the **Add** button. A filter can be modified at any time, even after it has been saved.

Once the filter has been saved, it can be used in a filtered search. To use the filter we just made in a policy search, select **Policy** from the main menu on the left then select **Policy – Individual**. In the **Policy** search window, type the filter name in the **Filter** field then click on the **Filter** hypertext link.

You can also type a portion of the filter name in the **Filter** field. If you enter a portion of the filter name, ECP will show you a list of filters that match your criteria. Select your filter from the **Filter** summary screen.

Contact Name	Carrier Name	Product Name	Plan Type	Policy #	Policy Date	Annual	Benefit Status
Nakamoto, Roy	ABC Life	ARTerm	Term	899909832409	12/10/1984	2,500.00	225,000 Inforce
Ansong, David	20th Century Life Insurance	Preferred Life	Term	23049823909	12/12/2002	1,250.00	750,000 Inforce
Haggler, Grant	20th Century Life Insurance	Preferred Life	Term	B48595	11/25/2002	900.00	150,000 Inforce
Gunderson, Betty	20th Century Life Insurance	Preferred Life	Term	B32567	11/25/2002	2,000.00	200,000 Inforce
Hallston, Shirley	20th Century Life Insurance	Preferred Life	Term	B34874	11/25/2002	2,400.00	215,000 Inforce
Holman, Mariko	20th Century Life Insurance	Preferred Life	Term	B23678	11/25/2002	2,000.00	200,000 Inforce

After you select your filter, ECP will display a list of all policies meeting the criteria set by your filter.