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  $70\frac{1}{2}$  years old during the year 2004.

To build a filter that will search for all contacts turning 701/2 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.

Category	
AcctMaster Liability Summary Join Advisor - Appointment and E&O Advisor - Appointments Advisor - Contract Advisor - E&O Advisor - License Advisor - Pending Case and Appointmen Advisor - Pending Case and E&O Advisor - Pending Case and Appointmen Advisor - Pending Case and Appointmen Calendar Activity Contact (Business and Individual) Contact - Business Contact - Individual Group Benefits - Pdaty and Members Group Benefits - Policy Holding Liability Summary Join Housebold	
Investment Position Investment Transactions Leads Opportunity Pending Case OK Cancel © 2000-2004 E-Z Data, Inc. All rights	•

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.

ables Available ontact ersonal	Columns Available	Table Column	Personal DOB
Address Phone Contact Extension	Job Title Occupation	Operator	Before
Advisor Basic Info Contact Referral	Tax Gender Marital Tobacco Total Income Net Worth Nationality Primary Language PIC PICQ Driver's License # Expiration Date State	Help Select a t Available Columns operator selected	After Equal to Not equal to Is Null Popular Date Ranges Advanced able (from Tables ) and a column (from Available). Specify the and value for the column.

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.



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Го	06/30/1934	1
gnore yea	r 🗌	
ок	Ca	ncel

Figure 3: The Date Range tool for the Advanced Filter Criteria window (range for all contacts turning 70<sup>1</sup>/<sub>2</sub> during 2004 selected.)

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

🖹 SmartOffice Web Page Dialog	
Select Conditions to Apply	Help
Relative to Specific Date	For more information, move the mouse over the conditions in
Date Range Operations	the "Select Conditions to Apply"
Number of Days Relative to Specific Date	mark appears over the desired
Next/Previous Days from Specific Date	condition, click to display more detailed help information.
Past/Future Event in the Next/Previous Days	
Our Click on underlined value to edit)  Column "DOB" in "Personal" should satisfy the following criteria:	
From 07/01/1933 To 06/30/1934	
< >	OK Cancel

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.

Filter Name		Filter Items + 1 [3]
Description All contacts turning 70 1/2 years old in 2004	ABC	
ОК		Show SQL Cancel

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  $70\frac{1}{2}$  in the year 2004.

ummary Personal	Add'l Personal	T V U Household Key	y Relations Benefit Letters/Docume	nts Opportunities Custom	<b>۲</b>
Contact Name	Туре	Age DOB	All Addresses	All Phones	
Adams, William	Client	70 02/14/1934	Residence - 5321 El Molino St., Pasadena, CA 91051	Business Fax - (626) 585-3550 Residence - (626) 512-1231	-
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	
Brooks, Stephen	Client	70 11/01/1933	Residence - 630 S. Oak Knoll Pasadena, CA, 91107 (626)-798-6645	Residence - (626) 795-0928	
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	
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	
🗌 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	
Tarumoto, Lucv	Client	70 03/12/1934	Residence - 348 E. Gleason. Monterev	Residence - (626) 736-1420	2
tecords Shown: 7	Total Records: 7				

Figure 6: Contact search results using the 701/2 in 2004 filter.

