



Filter Creation

There are three pieces of information that you will need in order to build a filter:

- The **location** of the data
- The **data** to be filtered on
- The **relationship** of the data to the filter

Location = Column

The location of the data refers to the field that the data is stored in. When creating a filter, the location will be referred to as the **Column**, since data in SmartOffice is stored in Tables and Columns. Some examples include **Type** or **DOB** fields of contact records.

Data = Value

The data that will be filtered on is the actual data in the field. The data is referred to as the **Value** when creating a filter. **Prospect** is an example of a **Value** that could be entered in the **Type** field.

Relationship = Operation

The relationship of the filter to the data will define how the filter operates. Thus, the relationship is referred to as the filter **Operation**. An example of filter operation is **Equal To**.

Creating a Filter:

- Select **Office Setup** in the main menu.
- Select **Filters**.
- From the Search Filter window, click the **Add** button.
- Click on a category (i.e. Contact – Individual).

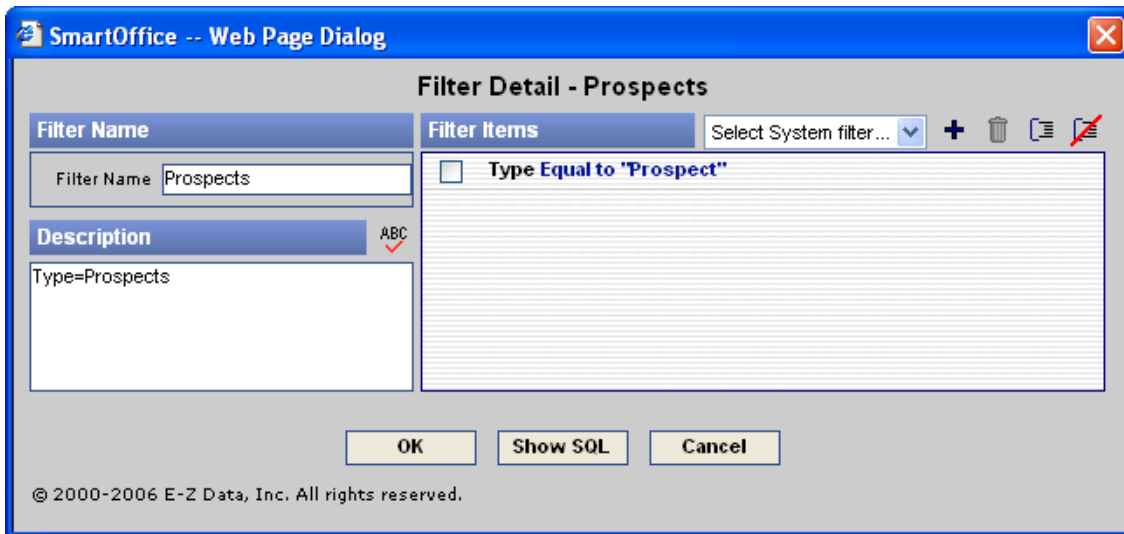


Figure 1: Filter Detail window

- In the Filter Name field, type the name of your filter (i.e. Prospects)
- In the Filter Description field, type more detailed information (i.e. Type=Prospects).
- To add criteria to your filter, click the **Add** button.
- From the Tables Available section, select the **table** where your data is located.

For example, if you needed data from the Type field, the Type field is located on the Contact table, so in this case you would choose Contact.

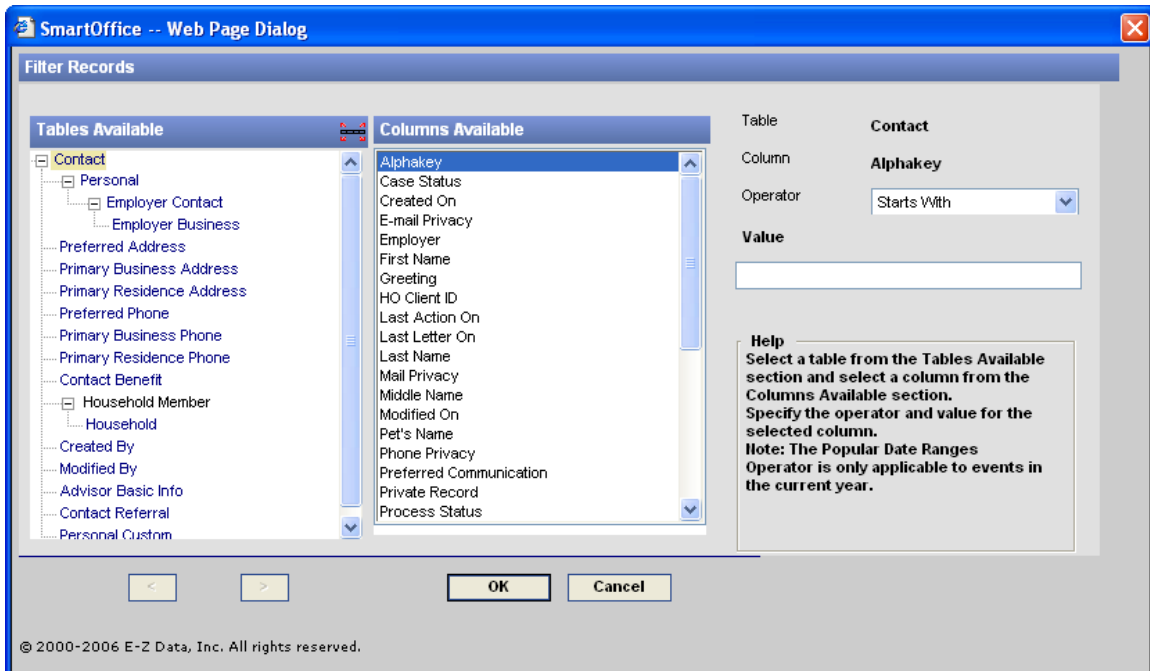


Figure 2: Filter Records window

- From the Columns Available section, select the specific **column** (i.e. Type).
- From the Operator drop-down, select the **Operation** (i.e. Equal To).



- Define the **Value** (i.e. Prospect).
- Click OK.

To use a Filter:

- Select **Contact** in the main menu.
- Select **Contact Search**.
- Define your Contact Search Options (i.e. Individual or Business).
- Type the name of your filter in the Filter Search field.
- Click the **Search** button.

Note: If more than one filter meets your Filter Search criteria, a Filter Summary screen will load. Choose your filter from this list.

- A summary screen will load with the data meeting your filter criteria.

Note: From the summary screen you can perform a number of functions including creating activities, generating correspondence, and building dynamic reports.

