

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 1935 or the first half of 1936. All contacts meeting this criterion will turn 70½ years old during the year 2006.

To build a filter that will search for all contacts turning 70¹/₂ during the year of 2006:

- Select Office Setup in the main menu and then select Filters.
- In the Search Filters screen, click Add.
- Select the **Contact-Individual** category. Click **OK**.
- 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.

			Table	Personal	
ables Available	Columns Available		Column		
Contact	# of Child Age Birth Place Citizenship	<u>^</u>	Operator	DOB Before	~
Preferred Address Primary Business Address Primary Residence Address Preferred Phone Primary Residence Phone Primary Residence Phone Contact Benefit Household Member Household Created By Modified By Advisor Basic Info Contact Referral Personal Custom	DOB Driver's License # Expiration Dt Gender HIPAA Date Job Title Marital Nationality Net Worth Occupation PIC PICQ Primary Language Salary State		section and Columns Av Specify the selected co Note: The Pe	opular Date Ranges only applicable to events in	

Figure 1: The Filter Criteria window (DOB column selected)

- Select the Advanced operator in the Operator field drop down.
- In the Filter Records window, select the Date Range Operations condition in the Select Conditions to Apply section.



©2006 E-Z Data, Inc. is a registered trademark of E-Z Data, Inc.

SmartOffice Web Page Dialog	
Filter Records	
Filter Records Select Conditions to Apply Relative to Specific Date Date Range Operations Number of Days Relative to Specific Date Next/Previous Days from Specific Date Past/Future Event in the Next/Previous Days Description (Click on underlined value to edit.) Column "DOB" in "Personal" should satisfy the following criteria: within date range	Help For more information, roll the cursor over the conditions in the Select Conditions to Apply section. When the question mark displays over the appropriate condition, click the question mark to display more detailed information.
© 2000-2006 E-Z Data, Inc. All rights reserved.	OK Cancel

Figure 2: The Filter Records Window

- 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, 1935** 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, 1936** as the end of the range. This range will find all contacts turning 70 years old in the latter half of 2005 or the first half of 2006, effectively generating a list of contacts turning 70½ years old during the year 2006.

• Click OK.

• Filter description selections will be reflected in the **Descriptions** section of the **Filter Records** screen.

- If the filter description is correct, click **OK**.
- Give the filter a name and a description in the Filter Setup screen.
- 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 2006.

