

System Filters I: Introduction

System filters make it possible to create filters that combine criteria from a number of different categories. System Filters can also be used to design a filter that will identify records without specific information such as contacts with no email address and policies without a specific rider.

To create a Filter using System Filters:

This example will use System Filters to create a filter to identify all contact records with no email address entered in SmartOffice.

- Select **Office Setup** in the main menu and then select **Filters**.
- When the **Search Filters** window opens, click **Add**.
- Select **Contact-Individual** in the **Contact Management** category of the **Category** window.
- Click on the **System Filter** drop-down and select the **Web Address** category.
- After selecting the **Web Address** category, two filter operators will be added to the **Filter Items** section of the **New Filter** window.

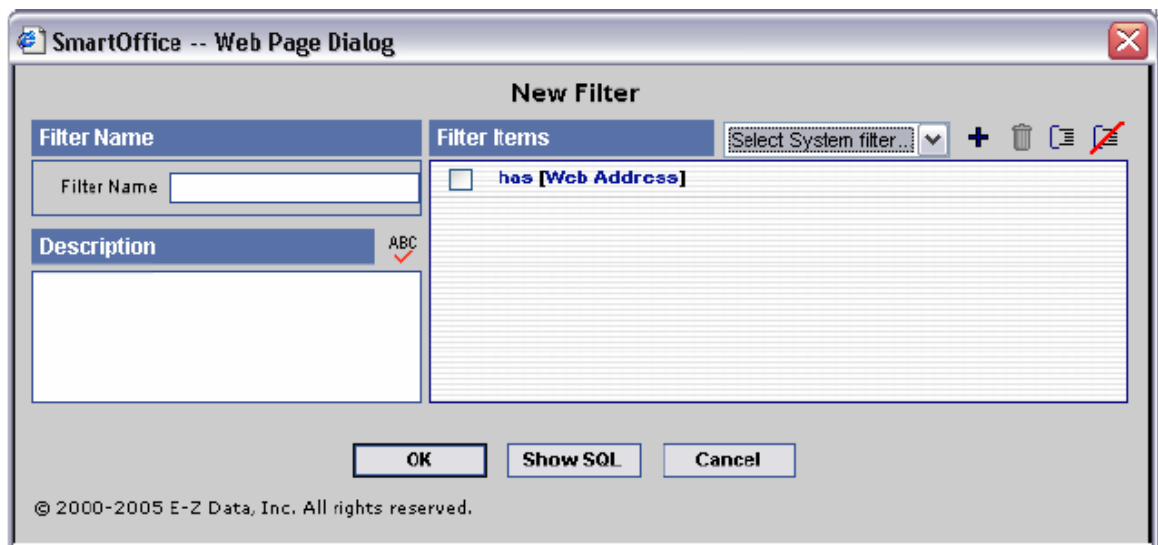


Figure 1: The Web Address System Filter operators.

- The first filter operator can be toggled between **Has** and **Has No**. For this example, the **Has** filter operator will be set to **Has No** as the filter will identify all contacts with no email address entered in SmartOffice.

- The second operator –the **Web Address** operator – is a hyperlink to the criteria in the **Web Address** category. Click on the **Web Address** category hypertext link to open the **Additional Condition** screen.
- Click the **Add** button in the toolbar.
- The **Filter Criteria** window will open.
- Select filter criteria as follows:
Table = Web Address
Column = Type
Operator = Equal to
Value = E-mail

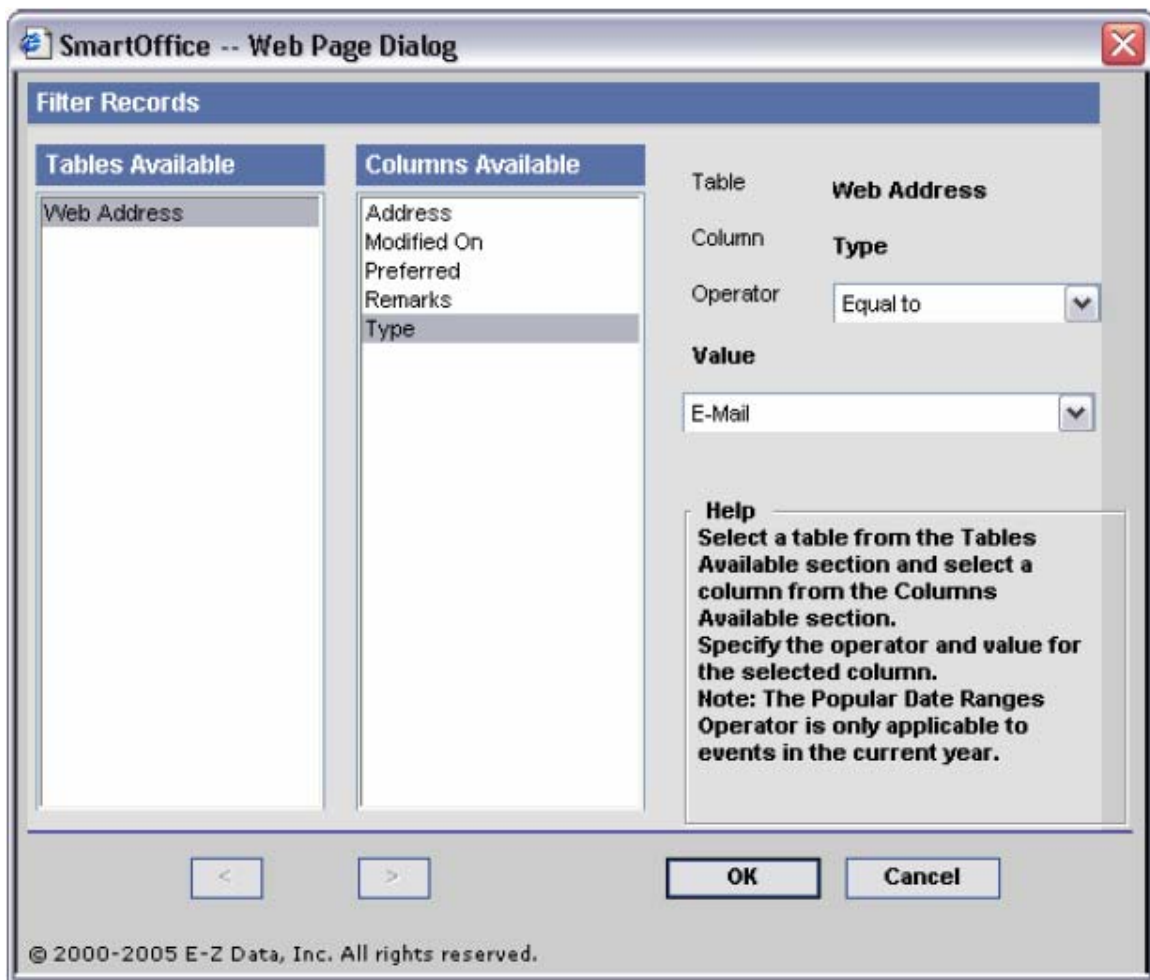


Figure 2: The Filter criteria for the Web Address filter operator.

- After selecting the criteria, click **OK** and then click **OK** on the **Additional Condition** screen.
- The **Web Address** operator will reflect the selections.
- Click the **Add** button in the toolbar.
- The **Filter Criteria** window will open.



- Select filter criteria as follows:
Table = Contact
Column = Type
Operator = Equal to
Value = Client
- After selecting the criteria, click **OK**.
- The selected criteria will appear in the **New Filter** screen.
- Give the filter a name and description.
- Click **OK** to save the filter.

