

## System Filters II: No Client Contact in the Last Year

Advisors are able to track client events such as appointments, phone calls, letters, and emails through entries in the SmartPad. But what about those clients who have not been contacted in the last six months or even the last 12 months and therefore have no recent SmartPad entries? In this lesson, we'll learn how to filter a list of clients in SmartOffice who have not been contacted in the last 12 months.

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 'No Contact' filter using System Filters:

This example will use System Filters to create a filter to identify all clients who have not been contacted in the last 12 months.

- 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 **SmartPad** category.
- After selecting the **SmartPad** category, two filter operators will be added to the **Filter Items** section of the **New Filter** window.

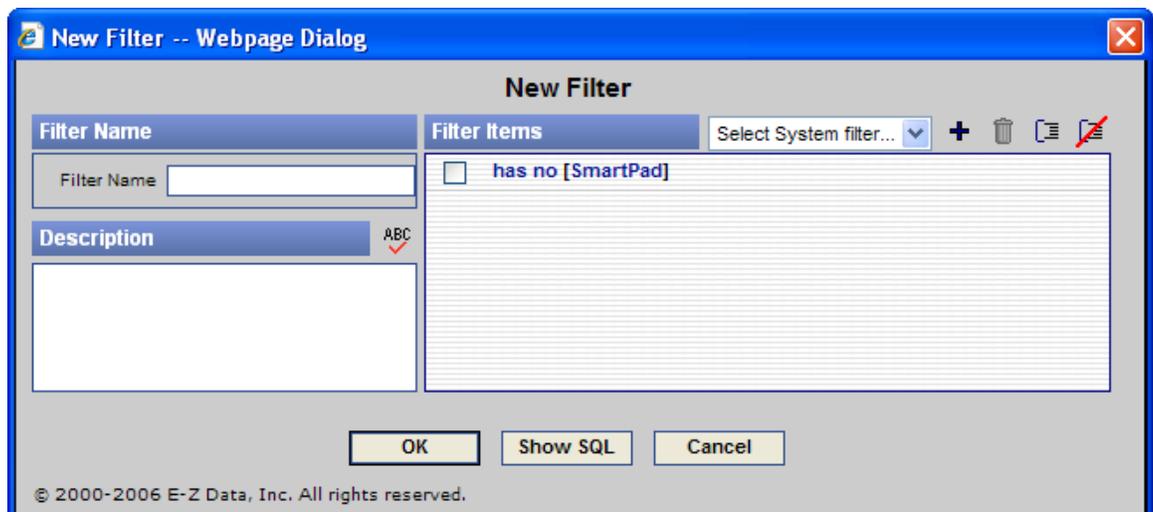
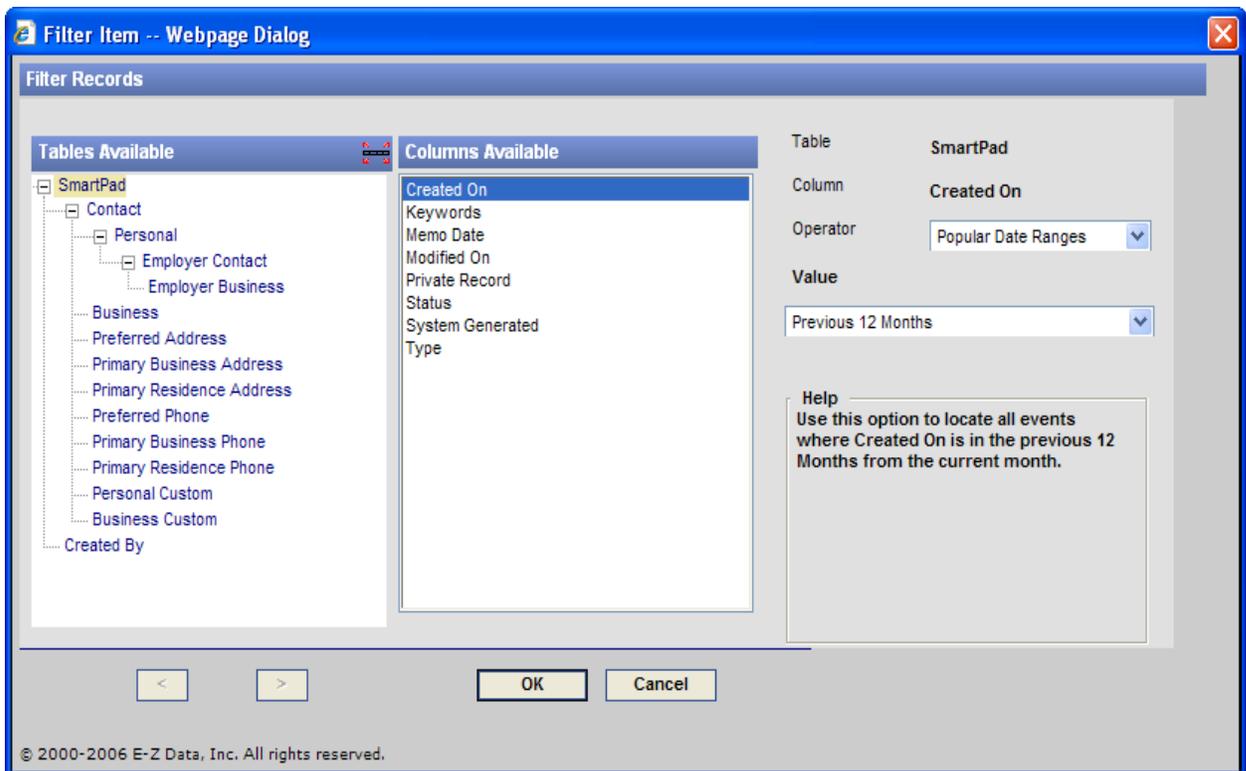


Figure 1: The SmartPad System Filter operators.

- 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 clients with no SmartPad entries in the last 12 months.
- The second operator –the **SmartPad** operator – is a hyperlink to the criteria in the **SmartPad** category. Click on the **SmartPad** 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 = SmartPad  
Column = Created On  
Operator = Popular Date Ranges  
Value = Previous 12 months



**Figure 2: The Filter criteria for the SmartPad filter operator.**

- After selecting the criteria, click **OK** and then click **OK** on the **Additional Condition** screen.
- The **SmartPad** 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 = Starts With

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.

