

System Filters III: Policy Data Mining

System Filters are not only used to mine contact data in SmartOffice, but can also be used to mine information such as investments, pending cases, and policies as well.

To create a filter to find 'All Preferred Life Policies with No Rider' using System Filters:

- Select Office Setup in the main menu and then select Filters.
- When the Search Filters window opens, click Add.
- Select **Policy Basic Information** in the **Policy Tracking** category of the **Category** window.
- Click the **add** button.



Figure1: The Filter Records window

- Select the **Product** table in the Tables Available section. And then select the **Product Name** in the Columns Available section.
- For the **Operator**, select **Equal To**.
- Type Preferred Life in the Value field. Click OK.
- Click the System Filter drop-down and select Policy Rider.



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- 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**.
- Give the filter a name and description.
- Click **OK** to save the filter.

🧃 Filter Detail - Pref Life - No Rider Webpage Dialog			×
Filter Detail - Pref Life - No Rider			
Filter Name	Filter Items	Select System filter 💌 🕂 📋 [🔳 💋	
Filter Name Pref Life - No Rider Description ABC All Preferred Life Policies with No Rider	Product Name Equal to "Preferred Life" and has no [Policy Rider]		
OK Show SQL Cancel © 2000-2006 E-Z Data, Inc. All rights reserved.			

Figure 2: The Filter Detail window

