

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.

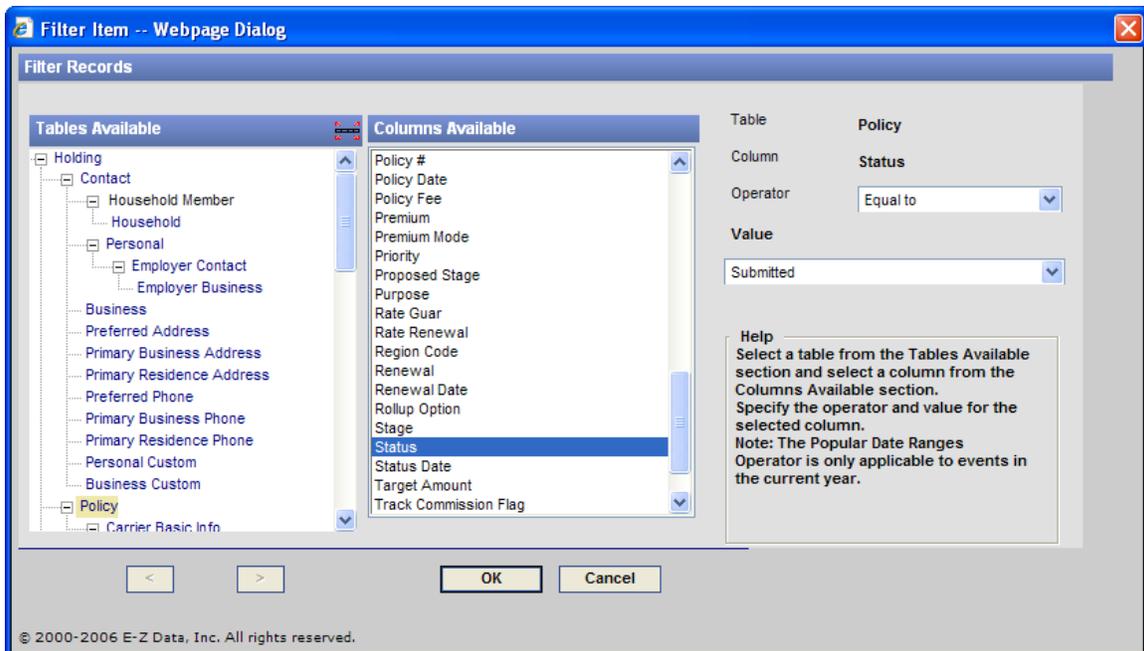


Figure1: The Filter Records window

- 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**.

- 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.

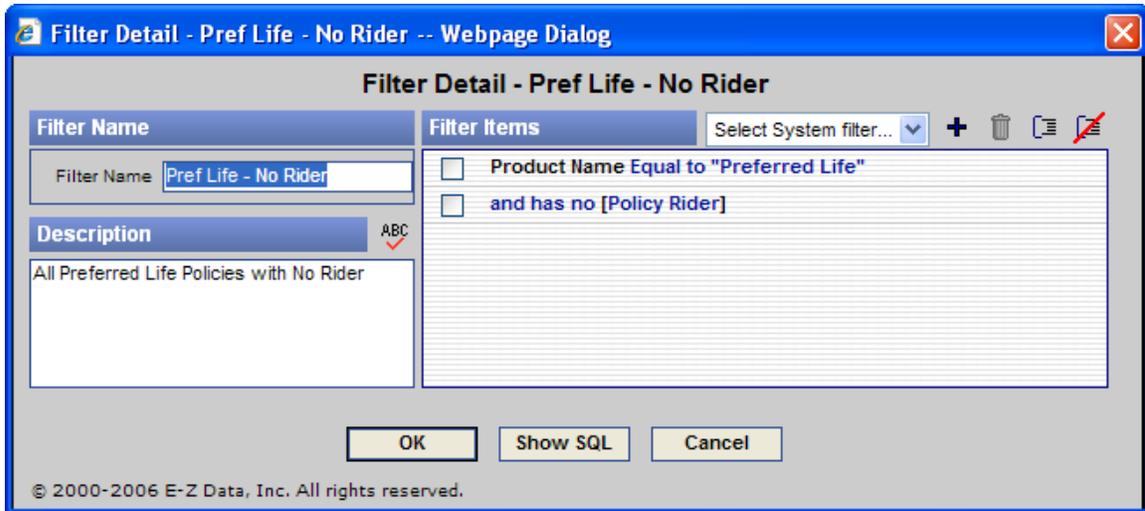


Figure 2: The Filter Detail window