Fast-Class File

SmartOffice

## Volume 23: Building Filters for the Half

One way of searching for contacts that will reach a specific 'half' age in a given month is to create a dynamic report with two filters: one filter to find all contacts of a specific age and a dated filter to find all contacts with a birthday occurring six months from the current month. Both sets of criteria can be combined in one filter, however, separating the criteria into two separate filters allows for greater flexibility should criteria from only one of the filters be needed for future data mining.

To build a filter that will search for all contacts of a specific age -

- Select **Marketing** in the main menu.
- 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 Age column in the Columns Available section.
- Select Equal to as the operator in the Operator field drop down.
- Enter the selected age in the **Value** field (for this example, the age is 64).

ables Available	Columns Available	Table	Personal
Contact	DOB		rcisulla
Personal	Age	Column	Age
Address	#Child		
Phone	Job Title	Operator	Equal to 💙
Contact Extension	Occupation		
Contact Benefit	Salary	Value	
Advisor Basic Info Contact Referral	Tax Gender	64	
Contact Neieffal	Marital	3. U.	
	Tobacco		
	Total Income	Help —	
	Net Worth		able (from Tables
	Nationality		and a column (from
	Primary Language		Available). Specify the
	PIC PICQ	selected	and value for the
	Driver's License #	SCICCICU	column.
	Expiration Date		
	State		

Figure 1: The Filter Criteria screen.



- Click **OK**.
- Give the filter a name and a description in the Filter Setup screen.

Filter Name Age (64)		Filter Items           Age Equal to "64"	+	U	(] 🎾
Description All contacts currently 64 years old	ABC				
<b>OK</b> © 2000-2004 E-Z Data, Inc. All rig		Show SQL Cancel			

Figure 2: The Filter Setup screen.

• Click OK.

To build a filter that will search for all contacts with a birthday occurring six months from the current month –

- Select Marketing in the main menu.
- 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 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.
- Select the **Advanced** operator in the **Operator** field drop down.
- In the Advanced Date Filter screen, select the Number of Days Relative to Specific Date condition in the Select Conditions to Apply section.
- Click the **Down Arrow** to move the condition into the **Description** section.
- Use the separate hyperlinks (**number of days**, **relative to**, and **specific date**) to create the filter description.



街 SmartOffice Web Page Dialog	X
SmartOrnce Web Page Diatog   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:   number of days relative to specific date	Help         For more information, move the mouse over the conditions in the "Select Conditions to Apply" section. When the question mark appears over the desired condition, click to display more detailed help information.
< >	OK Cancel

Figure 3: The Advanced Date Filter screen.

• Select the **number of days** hyperlink. Enter **6** in the **Value** field, select the **Month** option, and click **OK**.

ease spe	ecify the value
Value	6
ease spo	ecify the unit
Year	0
Month	۲
Day	0
ок	Cancel
2000-20 ghts reser	04 E-Z Data, Inc. All

Figure 4: Value and Unit options for the Number of Days portion of the advanced date filter.



• The **relative to** hyperlink will change to a **Before** hyperlink. Select the **Before** hyperlink. Select the **After** option and click **OK**.

Equal to	
Before	
After	
ок	Cancel

Figure 5: Operation options for the Relative To portion of the advanced date filter.

 The specific date hyperlink will change to a Today hyperlink. Select the Today hyperlink. Select Ignore in the Year and the Day drop down fields. Leave the This Month option selected in the Month drop down. Click OK.

] SmartOffice Web Page Dialog Please specify date	
Year Ignore Month This Month Day Ignore	~
OK Cancel	
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Figure 6: Date options for the Specific Date portion of the advanced date filter.

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



🔄 SmartOffice Web Page Dialog	X
Select Conditions to Apply	Help For more information, move the
Relative to Specific Date	mouse over the conditions in
Date Range Operations	the "Select Conditions to Apply" section. When the question
Number of Days Relative to Specific Date	mark appears over the desired
Next/Previous Days from Specific Date	condition, click to display more detailed help information.
Past/Future Event in the Next/Previous Days	
Description (Click on underlined value to edit)  Column "DOB" in "Personal" should satisfy the following criteria:	
6 months After this month(ignore year,day)	
< >	OK Cancel

Figure 7: Advanced Date Filter screen (date filter options selected).

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

Filter Name Future Bday (6 Month)		Filter Items       +       III       III       IIII       IIII       IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
Description	ABC	
All contacts having a birhtday six nonths from current month	~	
	~	

Figure 8: The Filter Setup screen (filter criteria added).

• Click **OK**.



To create a dynamic report with filters that will find all contacts who will turn 64  $^{1\!/_2}$  in the current month –

- Select **Marketing** in the main menu.
- Select Dynamic Reports.
- Click Add in the Search Dynamic Reports screen.
- Select the Contact-Individual category.
- Click OK.
- Select columns in the **Columns Available** tab of the **Dynamic Report Setup** screen.



Figure 9: The Column Description tab of the Dynamic Report Setup screen.

- Click the Name/Description tab to add filters to the dynamic report.
- Click the Add button in the Selected Filter List section.
- Search for the filter that will find all contacts currently 64 years old (64 (age)).
- In the filter summary screen, tag the 64 (age) filter and click OK or click on the hyperlink of the 64(age) filter.
- Click the Add button in the Selected Filter List section.
- Search for the filter that will find all contacts with a birthday occurring six months from the current month (**Future Bday (6 month)**).
- In the filter summary screen, tag the **Future Bday (6 month)** filter and click **OK** or click on the hyperlink of the **Future Bday (6 month)** filter.
- SmartOffice will automatically assign a linking operator between the two filters. By default, the linking operator is an **And** operator. The linking operator can be



changed to **Or** by clicking directly on the operator. Leave the linking operator set to **And**.

The Filter(s) Associated With This Report	
Please add one or more filter(s) to the follo spreadsheet to be associated with this rep	
Selected Filter List	+ 🗊
📄 64 (age)	
and Future Bday (6 Month)	
<b>«</b> ]	>
Click here to change the filter paramete time.	rs at run

Figure 10: The Selected Filter List section of the Name/Description tab with filter linking operator.

- Give the dynamic report a name and description on the Name/Description tab.
- Use the options on the **Report Package** tab to link the dynamic report to a form letter, activity, or campaign.

olumn Descrip		
)ynamic Rep	ort Name/Description	The Filter(s) Associated With This Report
Report Name	All contacts 64 and 1/2	Please add one or more filter(s) to the following spreadsheet to be associated with this report.
Report Class		
Keywords	<b>▼</b> C	Selected Filter List 🗕 🕇 🗍
Set Name		64 (age)
Description		and Future Bday (6 Month)
		Click here to change the filter parameters at run time.
	OK E-Z Data, Inc. All rights reserved.	Cancel

Figure 11: The Name/Description tab of the Dynamic Report Setup screen.

• When finished setting options, click OK in the Dynamic Report Setup screen.



To run the dynamic report with filters that will find all contacts who will turn 64  $\frac{1}{2}$  in the current month –

- Select Marketing in the main menu.
- Select Dynamic Reports.
- Enter search criteria for the report in the Search **Dynamic Reports** screen and click **Search**.
- Tag the selected dynamic report (All contacts 64 ½) in the Dynamic Report Summary screen and click the Run Report button or click on the All contacts 64 ½ hyperlink.
- SmartOffice will display a summary list of contacts meeting the report criteria.

Contact Name	Туре	Age	DOB	All Addresses	All Phones
Gibbs, Jeff	Client	64	03/25/1940	Residence - 1945 Devon Place, Diamond Bar, CA 91765 USA Business - 4523 Hill St., Los Angels, CA 91106	Business - (626) 958-6432
Gutierrez, Frank	Client	64	03/15/1940	Residence - 1900 Cloverleaf Lane, Pasadena, CA 91107	Residence - (626) 598-6589
Hwang, Julie	Client	64	03/15/1940	Business - 234 S. Hawthorne Blvd, Palos Verdes, CA 90023	sBusiness - (310) 377#6594
🗌 Koster, Craig	Client	64	03/05/1940	Business - 1107 Sunset Blvd., West Hollywood, CA 90046 USA	Business - (310) 487-9995
Ortega, Miguel	Client	64	03/02/1940	Residence - 5333 San Pasqual Pasadena, CA, 91107 (626)-792-2202	
] Powers, Melinda	Client	64	03/23/1940	Business - P.O. Box 1190, Seal Beach, CA 90740 Business - P.O. Box 1190, Seal Beach, CA 90740	Business - (714) 583-2817
Solito, Edward	Client	64	03/10/1940	Business - P.O. Box 405, Yorba Linda, CA 92885 Residence - 864 N. Montebello Blvd., Montebello, CA 90640	Residence - (323) 723-3909 Business - (714) 554-8706 Corporate Office - (213) 733-0388
] Sollert, James	Client	64	03/08/1940	Business - 987 E. 21st Street, Los Angeles, CA 90024 USA Residence - 2216 Victoria Ave., Venice Beach, CA 90291	Business - (626) 987-7288 Residence - (310) 390-7502
Vhittaker, Florence	Client	64	03/19/1940	Business - 9909 Davis Lane, Los Angeles, CA 90038 USA	Business - (323) 699-6855

Figure 12: Search results for the All Contacts 64 ½ dynamic report.

