## Fast-Class File

Client Data System

## Volume 42: Filtering for the Half

One way of searching for contacts that will reach a specific age in the next six months 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 in the next six months. Both sets of criteria can be combined in one filter, however, separating the criteria into two separate filters allows for greater flexibility should the same criteria be needed for future data mining.

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

- Select **View** in the main menu.
- Select Filters.
- Perform an open search to open the Filter Summary.
- In the Filter summary, click the Add button.
- In the Table Names window, select Contact Information.

Auto Insurance - Vehicle Information	-
Bonus Commission Components	
Business	
Business Client Junction	21.23
Commission Information	
Commission Schedule	
Commission Schedule Details	
Consumer User	
Contact Information	
Contract Information	
Custom Fields	
Database Users	
DI	
E-Mail	-

Figure 1: The Table Names window (Contact Information selected).

- In the **Filter Criteria** window, select the **Age** column in the **Column Name** drop down, enter the desired age (**64**in this example) in the **Value** field, and select the **Equal** option in the **Operation** section.
- Click the **Add** button.

Filter on Contact Ir	formation - Untitled	×
- Column Name	Value	Operation
Age ==== Age ==== = 64	- 6	<ul> <li>Equal</li> <li>Not equal</li> <li>Greater than</li> <li>Less than</li> <li>Range</li> </ul>
Add Filters	Mod Del	Link Operation C AND C OR
ОК	Cancel Run	Link Help

Figure 2: The Filter Criteria window (Criteria added).

- To test the filter, click the **Run** button.
- Click **OK**.
- Give the filter a name. Add a description if necessary.

To build a filter that will search for all contacts with a birthday in the next six months -

- Select **View** in the main menu.
- Select Filters.
- Perform an open search to open the Filter Summary.
- In the **Filter** summary, click the **Add** button.
- In the Table Names window, select Contact Information.
- In the Filter Criteria window, select the Birth Date column in the Column Name drop down.
- Click the **Add** button.
- Select Day Operations in the Date / Day Operations section of the Date Filter Operations Selection window.
- Enter **180** in the **Days** field (to approximate six months), select the **Next Days** option, and select the **Ignore Year** option. If the **Ignore Year** option is not selected, the filter will not search for the anniversary of birthdates, but the actual birthdates. Select the **Ignore Year** option to ensure that the filter will search for birthdays as opposed to birthdates.

Days 180	This option is used to find all events
	occurring within the specified number of
Next Days	Days in the fature, while ignoring the year
C Previous Days	
🔽 Ignore Year	Example:
	To use this option in a filter that will find a birthdays in the next 14 days, regardless o the year of birth, select Next Days and Ignore Year, enter 14 in the Days field an then click OK.

Figure 3: The Days Operation screen (criteria added).

- Click **OK**.
- To test the filter, click the **Run** button.

Table Name	Cor	ntact			
Number of Matchi	ng Records	101			
Where clause o	of the SQL query	generated			
(Contact."DOB' (( {fn MONTH (Contact."DOB' (( {fn MONTH (	"]} <= 31 ) OR ( { (Contact."DOB") ")} >= 1 ) OR ( {fi Contact."DOB")}	(fn MONTH (Cor )} = 1 AND {fn n MONTH (Cont = 2 AND {fn C	itact."D DAYOF act."DC AYOFM	108")} < 12 )) ) 108")} < 12 )) ) 1000TH 100TH	
List of records	satisfying this fill	ter			
List of records	satisfying this filt 7. 🗶 🖽 🎒 First Name	Gender	Age	Birth Date	1
List of records	satisfying this fill 7. X III 🖨 First Name Joe	Gender Male	Age 64	Birth Date 10/20/1939	1
List of records Last Name Halverson Umbarger	satisfying this fill .  .  .  .  .  .  .  .  .  .  .  .  .	Gender Male Male	<b>Age</b> 64	<b>Birth Date</b> 10/20/1939 10/20/1944	1
List of records List of records Last Name Halverson Umbarger Arrieta	satisfying this fill 	Male Male Male	<b>Age</b> 64 55 45	Birth Date 10/20/1939 10/20/1944 10/20/1954	
List of records 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	satisfying this fill To be Joe Mitchell Michael Henry	Male Male Male Male Male	Age 64 55 45 64	Birth Date 10/20/1939 10/20/1944 10/20/1954 11/10/1939	

Figure 4: The Filter Criteria test window (data for birthdays in next six months).

- Click **OK**.
- Give the filter a name. Add a description if necessary.

To add filters to a dynamic report to find all contacts who will turn 65 in the next six months -

- Select **Reports** in the main menu.
- Select Dynamic Reports.
- Perform an open search to open the **Reports** summary.
- Click the **Add** button.
- Select the Contact Information table in the Select Primary Table window.

Report Definition Wizard		
ſ	Select Primary Table Application History Auto Insurance - Driver Information Auto Insurance - Vehicle Information Bonus Commission Components Business Business Client Junction Commission Information Commission Schedule Commission Schedule Details Consumer User Contact Information Contract Information Custom Fields Database Users Form Letter Analysis Report General Add General Dental	
Ca	ncel < Back Next > Finish	Help

Figure 5: The Select Primary Table window (Contact Information selected).

• Select columns for display in the report in the **Report Column Definition** window.

	Jate	Total L	ife Premium	Inco	me	-   •   -
Columns Av Client No Suffix Middle Greeting Title Type Sub Type Source Source Occupation Job Title	nati V	· 오	Columns Sele Last Name First Name Gender Age Birth Date Total Life Premi Income	um -2	Sort	ection Ascending Jescending

Figure 6: The Report Column Definition window

Columns can be added to the **Columns Selected** section by selecting the column in the **Columns Available** section, then clicking the **Arrow** button pointing toward the **Columns Selected** section, or by double-clicking the entry in the **Columns Available** section. Columns can be moved out of the **Columns Selected** section in the same fashion.

• Use the **Filter** drop down fields in the **Selection Criteria** window to add the filters to the dynamic report.

	Filter
$\mathbf{V}$	SMONTHS      C AND C OB       AGE 35 · 50      C AND C OB       AGE = 64      C AND C OB       BD10PRV      C AND C OB       BD20T30      C AND C OB
	Set

Figure 7: The Selection Criteria window (Filter drop down active).



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Filter availability in the **Filter** drop down fields will be determined by primary table selection in the **Select Primary Table** window. For example, if the **Contact Information** table is selected as the primary table in the **Select Primary Table** window, filters built on the **Contact Information** table will be available in the Filter drop down fields of the **Selection Criteria** screen.

	Selection Criteria	
	AGE = 64 AND O OR	
$\mathbf{M}$	I CAND COR	
•	CAND COR	
	Set	

Figure 8: The Selection Criteria window (And and Or operators active – And operator selected).

When a filter is selected in a **Filter** drop down, the filter operators become active. The filter operators refer to the next filter added (if applicable). Selecting the **And** operator will ensure that report results include records that meet criteria for the filter with the operator <u>and</u> the following filter. Selecting the **Or** operator will ensure that report results include records that meet the criteria of the filter with operator <u>or</u> the criteria of the following filter.

- Apply settings as needed in the **Select Output Type** and **Spreadsheet Output Settings** windows.
- Give the report a name in the **Report Package Description** window.

=_>	Report Package D	escription	
	Description All contacts Category Contact Keywords	s turning 65 next six months	
÷	I All Users I RunTime Filter	Contact Selection Options  Contact Selection Options  Include Contacts  Include Agents Include Dependents	

Figure 9: The Report Package Description window.

- Click Finish.
- The new report will be automatically highlighted in the **Report** summary screen.
- With the report highlighted, click the **Run** button.

8	Last Name	First Name	Gender	Age	Birth Date
	Bartelo	Frank	Male	64	01/15/1940
	Halverson	Joe	Male	64	10/20/1939
	Hasnain	Amir	Male	64	02/11/1940
	Mariondale	Henry	Male	64	11/10/1939
	Meresman	Michael	Male	64	02/01/1940
	Mineo	David	Male	64	11/28/1939
	Nelson	Yolanda	Female	64	09/10/1939
	Nimersheim	Gene	Male	64	08/30/1939
	Wolton	Peter	Male	64	01/02/1940
	Drake	Frank	Male	64	01/12/1940
	Polster	Karen	Female	64	12/25/1939

Figure 10: Results of a dynamic report displaying all contacts who will turn 65 years old in the next six months.