

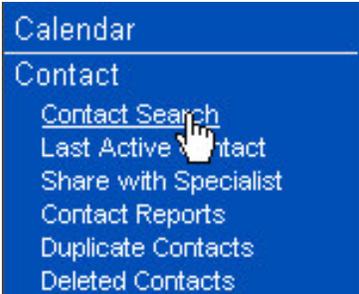
# Fast•Class File

SmartOffice

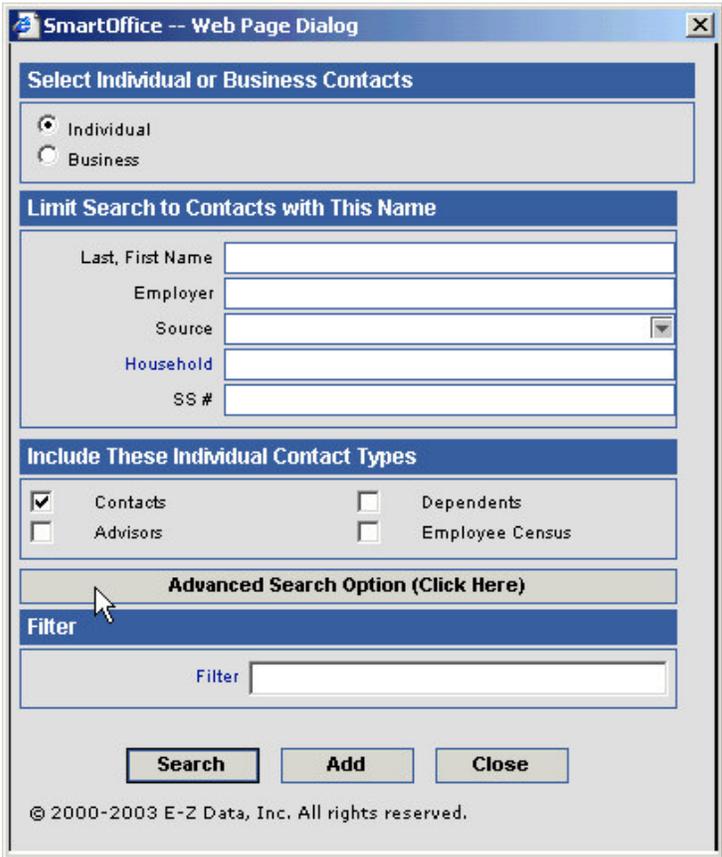
Volume Seven: Advanced Search Tools

To access the Advanced Search Tools:

- Select **Contact** in the SmartOffice menu and then select **Contact Search**.



- When the **Contact Search** window opens, click on the **Advanced Search Options** bar to open the Advanced Search Tools.



With the Advanced Search Options tool open; you can perform a contact search based on City, State, or Zip code information, Phone number, Policy number, Account number, or information captured in the Alphakey field on the **Additional Personal** tab of the Contact Record.

Advanced Search Option (Click Here)	
Advanced Search Information	
City	<input type="text"/>
State/ZIP Code	<input type="text"/> <input type="text"/>
Phone #	<input type="text"/>
Policy #	<input type="text"/>
Account #	<input type="text"/>
Alphakey	<input type="text"/>
Filter	
Filter	<input type="text"/>

To perform a search for all contacts in SmartOffice with an address in Pasadena, CA:

- Type Pasadena in the **City** field and the abbreviation for California (CA) in the **State** field.

City	Pasadena	
State/ZIP Code	CA	<input type="text"/>

- Click **Search**.
- A listing of all Contacts entered in SmartOffice meeting the search criteria will be displayed in the **Contact Summary** screen.

Summary	Personal	Add'l Personal	Household	Key Relations	Benefit	Letters/Documents	Opportunities	Custom
Contact Name	Type	All Phones	All Addresses	DOB	Total Premium			
<input type="checkbox"/> Ackerman, Joseph	Client	Business - (310) 273-9873 Residence - (626) 984-0382 Mobile - (213) 577-0337 Business - (310) 309-0948#152 Residence - (626) 799-2951 Business Fax - (626) 585-3512	Business - 1828 Marengo Street, Los Angeles, CA 90033 USA Vacation - 24530 Indian Hill Lane, West Hills, CA 91307 Business - 144 Wilshire Blvd., Suite 250, Los Angeles, CA 90007 Residence - 488 S. Oakland Avenue, Pasadena, CA 91101	02/27/1950	11,335			
<input type="checkbox"/> Ackerman, Kathleen	Client	Residence - (626) 984-0382 Business - (310) 273-9873	Business - 1828 Marengo Street, Los Angeles, CA 90033 USA Residence - 488 S. Oakland Avenue, Pasadena, CA 91101	01/03/1955	6,101			
<input type="checkbox"/> Adams, William	Client	Business Fax - (626) 585-3550 Residence - (626) 512-1231	Residence - 5321 El Molino St., Pasadena, CA 91051	04/14/1967	17,400			



To perform a search for all contacts entered in SmartOffice with a (626) area code:

- Type 626 in the **Phone #** field.

Phone #	626
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- Click **Search**.
- A listing of all Contacts entered in SmartOffice meeting the search criteria will be displayed in the **Contact Summary** screen.

Summary	Personal	Add'l Personal	Household	Key Relations	B
Contact Name	Type	All Phones			
<input type="checkbox"/> Ackerman, Joseph	Client	Business - (310) 273-9873 Residence - (626) 984-0382 Mobile - (213) 577-0337 Business - (310) 309-0948#152 Residence - (626) 799-2951 Business Fax - (626) 585-3512			
<input type="checkbox"/> Anders, Thomas	Lead	Business - (626) 792-2201#			
<input type="checkbox"/> Hardy, David	Lead	Business - (626) 331-9002#			
<input type="checkbox"/> Jia, Raymond	Prospect	Business Fax - (626) 585-3550			
<input type="checkbox"/> Paladian, Mark	Staff	Residence - (626) 987-0987 Business - (800) 335-1452#104			
<input type="checkbox"/> Story, Aaron	HORep	Business - (626) 585-3505			



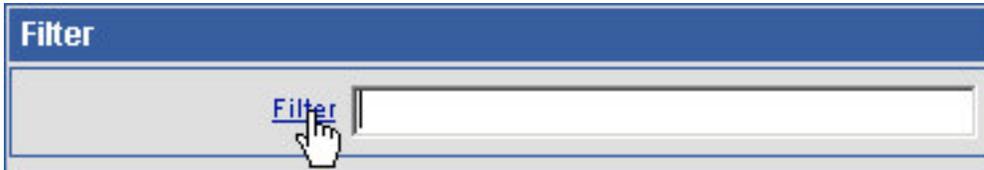
To use a filter to perform a contact search:

If you know the name of the filter to be used in the search -

- Type the name of the desired filter in the **Filter** field and click **Search**.

If you do not know the name of the filter to be used in the search –

- Click the **Filter** hypertext link.



- A list of all available filters will be displayed in a **Filter** summary screen.
- Select the desired filter by clicking on the **Filter Name** hypertext link. (The filter used in the Fast Class example is Birthdays in Next 30 Days)
- A listing of all Contacts entered in SmartOffice meeting the search criteria will be displayed in the **Contact Summary** screen.

Summary	Personal	Add'l Personal	Household	Key Relations	Benefit	Letters/Documents	Opportunities	Cu
Contact Name	Type	All Phones	All Addresses	DOB				
<input type="checkbox"/> Abernathy, Brad	Client	Mobile - (626) 522-1160	Business - 315 Bickard St., Huntersville, NC 28078 USA	01/27/1978				
<input type="checkbox"/> Atable, Wenelyn	Prospect			02/05/1935				
<input type="checkbox"/> Arliss, Jill	Candidate	Residence - (895) 577-4544 Business - (626) 5852323	Residence - 141 W Hunchinton Dr., Pasadena, CA 91105 Business - 1011 Colorado Blvd, Pasadena, CA 91106	01/30/1960				
<input type="checkbox"/> Baronoy, Alexi	Candidate	Residence - (789) 558-5474	Residence - 400S Arroyo Bl., Arcadia, CA 91006	01/30/1980				

*Note: SmartOffice automatically changes the **Contact DOB** entry to red ten days before and five days after a contact's birthday.*

