January 23, 2004

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**.

Accesses	
Contact	
Contact Search	
Last Active Chtact	
Contact Reports	
Duplicate Contacts	
Deleted Contacts	

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

Select Individual or Business Contacts Individual Business Limit Search to Contacts with This Name Last, First Name Employer Source Household SS # Include These Individual Contact Types Contacts Contacts Contacts Advisors Employee Census Advanced Search Option (Click Here) Filter Filter	🎒 SmartOffice Wel	Page Dialog	×					
Individual Business Limit Search to Contacts with This Name Last, First Name Employer Source Household SS # Include These Individual Contact Types ✓ Contacts Dependents Advisors Employee Census Advanced Search Option (Click Here) Filter Search Add Close	Select Individual or Business Contacts							
Limit Search to Contacts with This Name Last, First Name Employer Source Household SS # Include These Individual Contact Types ✓ Contacts Dependents Advisors Employee Census Advanced Search Option (Click Here) Filter Search Add Close	 Individual Business 							
Last, First Name Employer Source Household SS # Include These Individual Contact Types Contacts Advisors Employee Census Advanced Search Option (Click Here) Filter Filter Filter Search Add Close	Limit Search to Con	acts with This Name						
Employer Source Household SS # Include These Individual Contact Types Contacts Contacts Advisors Employee Census Advanced Search Option (Click Here) Fitter Fitter Fitter Search Add Close	Last, First Name							
Source Household SS # Include These Individual Contact Types Contacts Advisors Employee Census Advanced Search Option (Click Here) Filter Filter Search Add Close	Employer							
Household SS # Include These Individual Contact Types Contacts Dependents Advisors Employee Census Advanced Search Option (Click Here) Filter Filter Search Add Close	Source	¥						
SS # Include These Individual Contact Types Contacts Co	Household [
Include These Individual Contact Types Contacts Dependents Advisors Employee Census Advanced Search Option (Click Here) Fitter Fitter Search Add Close	SS# [
Contacts Dependents Advisors Employee Census Advanced Search Option (Click Here) Filter Filter Search Add Close	Include These Indivi	dual Contact Types						
Advisors Employee Census Advanced Search Option (Click Here) Filter Filter Search Add Close	Contacts	Dependents						
Advanced Search Option (Click Here) Filter Filter Search Add Close	Advisors	Employee Census						
Filter Filter Search Add Close	Advan	Advanced Search Option (Click Here)						
Filter Search Add Close	Filter							
Search Add Close	Filte	ıt 📃						
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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					
State/ZIP Code					
Phone #					
Policy#					
Account#					
Alphakey					
Filter					
Filte	·				

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

- 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
Conta	ct Name	Туре	All Phones	2	All Ad	dresses	DOB	Total Premium
C Ackern	nan, Joseph	Client	Business - (3 Residence - (Mobile - (213) Business - (3 Residence - (Business Fa)	110) 273-9873 (626) 984-0382) 577-0337 (10) 309-0948#15 (626) 799-2951 (- (626) 585-3512	Busine Los An Vacatio 2 West H Busine 2 250, Lo Reside Avenue	ss - 1828 Marengo Stre geles, CA 90033 USA on - 24530 Indian Hill La iills, CA 91307 ss - 144 Wilshire Blvd., is Angeles, CA 90007 nce - 488 S. Oakland e, Pasadena, CA 91101	et, 02/27/1950 ne, Suite	11,335 🔺
C Ackern	nan, Kathleen	Client	Residence - (Business - (3	(626) 984-0382 (10) 273-9873	Busine Los An Reside Avenu	ss - 1828 Marengo Stre geles, CA 90033 USA nce - 488 S. Oakland e, Pasadena, CA 91101	et, 01 <i>1</i> 03/1955	6,101
C Adams	; William	Client	Business Fax Residence - ((- (626) 585-3550 (626) 512-1231) Reside Pasade	nce - 5321 El Molino St. ena, 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	

- 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	
Conta	ict Name	Туре	All Phones		
Ackerman, Joseph 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 - (626) 792-2201#		
		Lead			
Hardy,	, David	Lead	Business - (626) 331-9002#		
 Jia, Raymond Paladian, Mark Story, Aaron 		Prospect	Business Fax	(- (626) 585-3550	
		Staff	Residence - (Business - (8	(626) 987-0987 300) 335-1452 # 104	
		HORep Business - (626) 58		26) 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.

Filter		
	<u>Filter</u>	

- 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 Op	portunities Cu
	Contact Name	Туре	All Phones	All Addresses	DOB
	Abernathy, Brad	Client	Mobile - (626) 522-1160	Business - 315 Bickard St., Huntersville, NC 28078 USA	01/27/1978
	Afable, Wenelyn	Prospect			02/05/1935
	🔲 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
8	🔲 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.

