Filter Creation
There are three pieces of information that you will need in order to build a filter:

- The location of the data
- The data to be filtered on
- The relationship of the data to the filter

Location = Column
The location of the data refers to the field that data is stored in. When creating a filter, the location will be referred to as the Column, since data in CDS is stored in Tables and Columns. Some examples include the Type or DOB fields of contact records.

Data = Value
The data will be filtered on is the actual data in the field. The data is referred to as the Value when creating a filter. Prospect is an example of a Value that could be entered in the Type field.

Relationship = Operation
The relationship of the filter to the data will define how the filter operates. Thus, the relationship is referred to as the filter Operation. An example of filter operation is Equal To.

Creating a Filter
- Click on View in the main menu bar.
- Click on Filters in the View menu.
- Perform an open search to open the Filter List summary.
- Click the Add button in the Filter List summary.
- Select the Table where the Column, which will be included in the filter, is located.

Note: As you work in CDS, you will become more familiar with Table and Column relationships.

- After selecting the table click OK.
- CDS will open a New Filter window.
Figure 1: New Filter window.

- Use the **Column Name** field to select the column.
- Define the value in the **Value** field.
- Select the operator in the **Operation** section.
- Click the **Add** button to add the filter criteria to the filter.
- To test the filter, click the **Run** button. You will be prompted to give the filter a name and description.
- After testing the filter, click **Close**.
- Click **OK** to confirm the Filter name.
- The new Filter will be saved in the Filter list summary and can be used in filtered searches, to define set membership, or in data mining as part of a Dynamic Report.