System filters can be used to search for contacts based on:
- Zip/Postal Code Information
- Phone Number
- Policy Number
- Email Address
- Total Family Income (greater than or equal to a specific value)

To use the Zip/Postal Code system filter:
- Click the Contact button in the toolbar of the CDS main screen or click the Find button on the toolbar of a Contact summary screen or the toolbar of a Contact Record.
- In the Find Contact Information window, click the drop-down in the System Filters field and select the Zip Code/Postal Code option.

Figure 1: The Find Contact Information window (Zip Code/Postal Code System Filter selected).

- Click OK.
• In the Zip/Postal Code Filter window, enter the zip or postal code in the Zip/Postal Code field.
• To limit the search to a specific type of address, left click in the Type field to activate the Type drop-down and select an address type from the available options.
• Click OK to perform the search based on entered criteria.

To use the Phone Number system filter:
• Click the Contact button in the toolbar of the CDS main screen or click the Find button on the toolbar of a Contact summary screen or the toolbar of a Contact Record.
• In the Find Contact Information window, click the drop-down in the System Filters field and select the Phone Number option.
• Click OK.
• In the Phone Filter window, enter the phone number.
  Note: Parenthesis and hyphens are part of a field mask to ensure proper formatting. Only the phone number itself needs to be added.
• Click OK to perform the search based on entered criteria.

To use the Policy Number system filter:
• Click the Contact button in the toolbar of the CDS main screen or click the Find button on the toolbar of a Contact summary screen or the toolbar of a Contact Record.
• In the Find Contact Information window, click the drop-down in the System Filters field and select the Policy option.
• Click OK.

![Policy Filter Window](image)

Figure 2: The Policy Filter window.

• Enter the number of the policy in the Policy # field.
• Define the role of the contacts associated with the policy to be searched for by selecting the appropriate options in the By Role section. For example, to search for the beneficiary of a policy, enter the policy number in the Policy # field and select the Beneficiary option. Use the Select All button to select all role options.
Use the **Deselect All** button to reset role options to null if all role options are selected.
- Click **OK** to perform the search based on entered criteria.

**To use the Family Income system filter:**
- Click the **Contact** button in the toolbar of the CDS main screen or click the **Find** button on the toolbar of a **Contact** summary screen or the toolbar of a **Contact Record**.
- In the **Find Contact Information** window, click the drop-down in the **System Filters** field and select the **Family Income >=** option.
- Click **OK**.
- Enter the income amount in the **Income** field.
- Click **OK**.
- Enter the number of the policy in the **Policy #** field.
- Define the role of the contacts associated with the policy to be searched for by selecting the appropriate options in the **By Role** section. For example, to search for the beneficiary of a policy, enter the policy number in the **Policy #** field and select the **Beneficiary** option. Use the **Select All** button to select all role options. Use the **Deselect All** button to reset role options to null if all role options are selected.
- Click **OK** to perform the search based on entered criteria.

To use the Family Income system filter –
- Click the **Contact** button in the toolbar of the CDS main screen or click the **Find** button on the toolbar of a **Contact** summary screen or the toolbar of a **Contact Record**.
- In the **Find Contact Information** window, click the drop-down in the **System Filters** field and select the **Family Income >=** option.
- Click **OK**.
- Enter the income amount in the **Income** field.