

Fast Class File

Client Data System

Volume 108: System Filters

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.

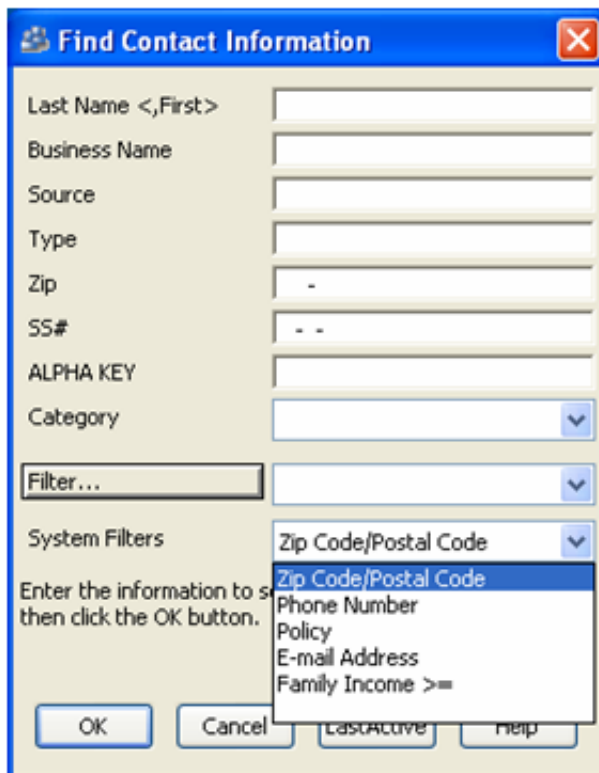


Figure 1: The Find Contact Information window (Zip Code/Postal Code System Filter selected).

- 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**.

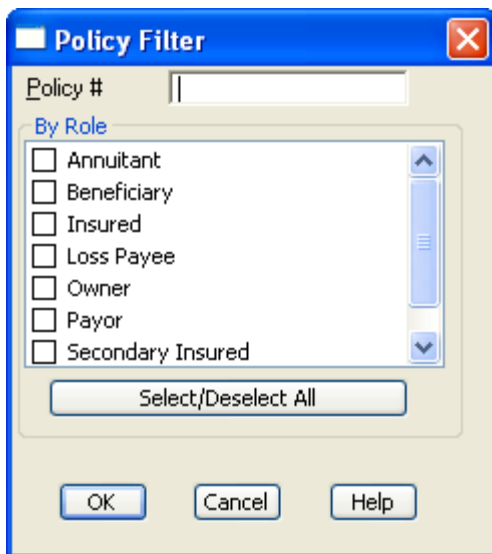


Figure 2: The Policy Filter window.

- 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.