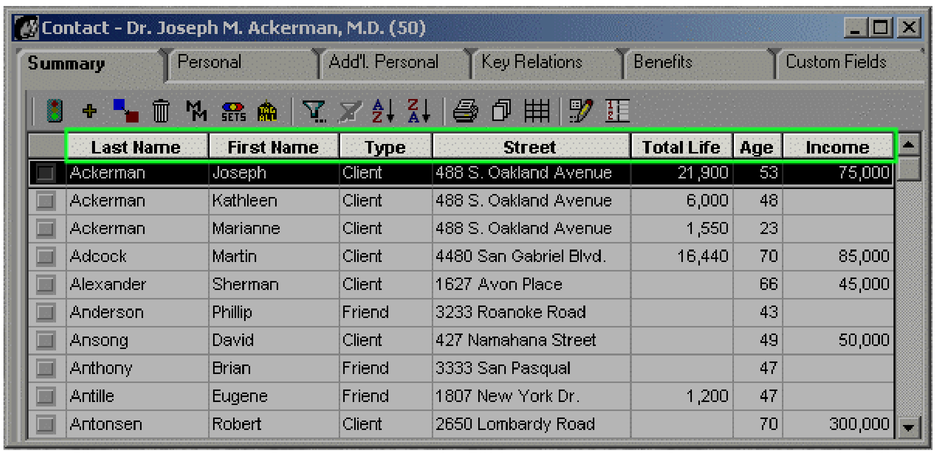
e-Z News ...the electronic E-Z Data Newsletter!

Marketing Made E-Z --- continued…

In our last issue, we prepared to mine our database for prospects that are ideal for a new Long Term Care product. We determined that the LTC is a good fit for clients who already carry life insurance, are between the ages of 35 and 60, and have an annual income between $35,000 and $80,000 a year.

Our first step was to bring the relevant columns into our **Summary** view. In Volume 16, we used the **Customize Layout** Button to bring the **Total Life Premium**, **Age**, and **Income** columns into the **Summary** view.



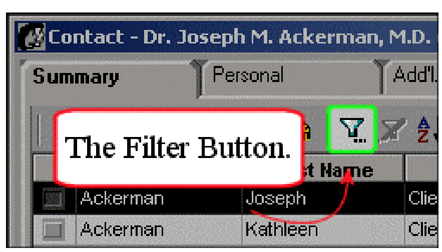
Last Name	First Name	Type	Street	Total Life	Age	Income
Ackerman	Joseph	Client	488 S. Oakland Avenue	21,900	53	75,000
Ackerman	Kathleen	Client	488 S. Oakland Avenue	6,000	48	
Ackerman	Marianne	Client	488 S. Oakland Avenue	1,550	23	
Adcock	Martin	Client	4480 San Gabriel Blvd.	16,440	70	85,000
Alexander	Sherman	Client	1627 Avon Place		66	45,000
Anderson	Phillip	Friend	3233 Roanoke Road		43	
Ansong	David	Client	427 Namahana Street		49	50,000
Anthony	Brian	Friend	3333 San Pasqual		47	
Antille	Eugene	Friend	1807 New York Dr.	1,200	47	
Antonsen	Robert	Client	2650 Lombardy Road		70	300,000

Now that we have the columns we need in our **Summary** view, we can effectively mine our database for the prospects who match our search criteria. Our next step is to refine the data using the **Filter** tool in CDS until we see only the ideal prospects.

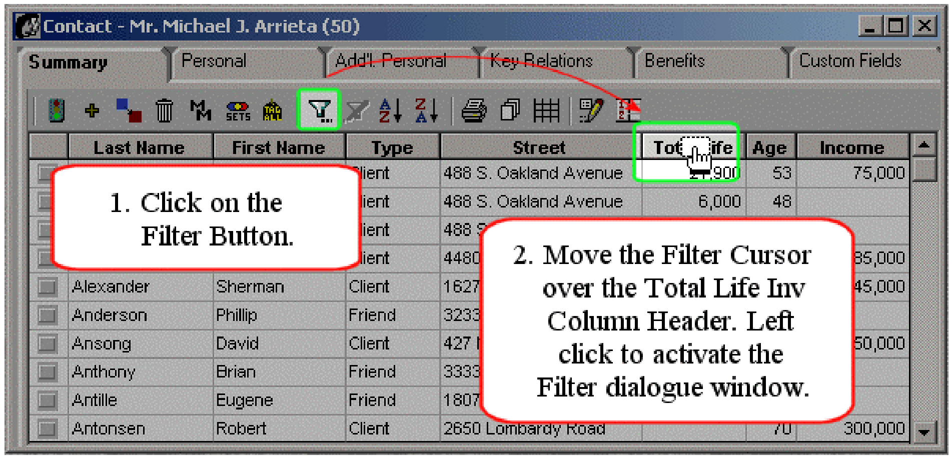
Filtering "On-the-Fly"

Using the **Filter** tool to make temporary changes to a **Summary** view is called filtering "On-the Fly". **Summary** views, by definition, give you a summary of the information contained in your database. When you filter "On-the-Fly", you tell CDS to show you a summary of data based on your criteria. With the **Filter** tool, you have the ability to display data, as you need it, when you need it!

Launch the Filter tool by clicking the **Filter** button. The **Filter** button in CDS looks like a funnel



When you click the **Filter** button, your cursor changes into a little hand with a box under one of its fingers. This is the **Filter Cursor.**



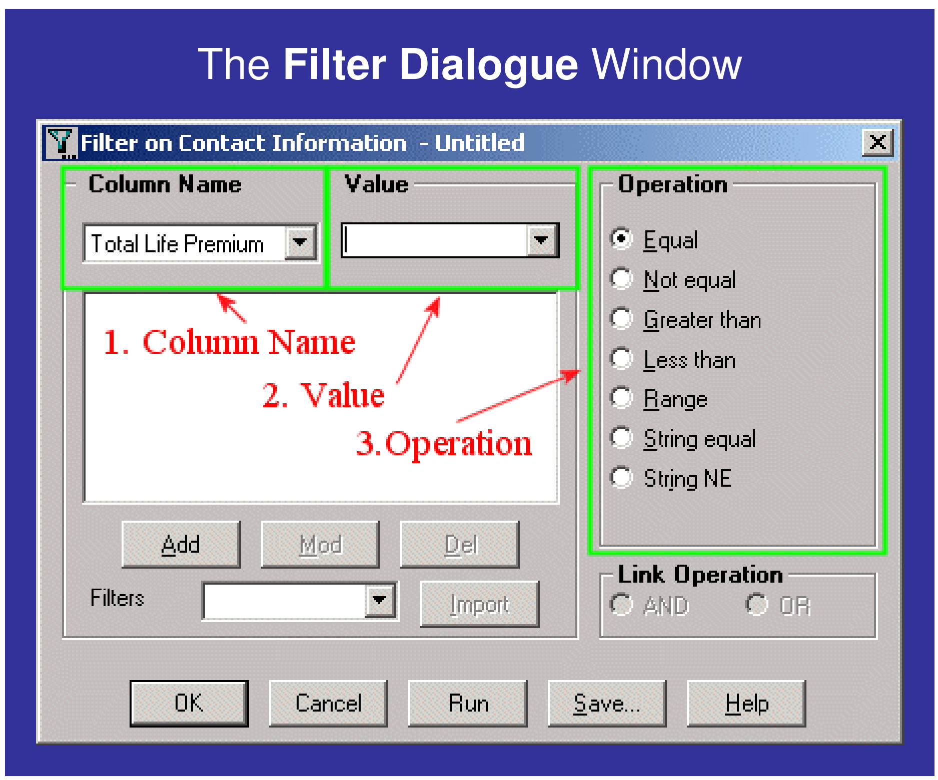
The Filter dialogue window is where filters are made (defined) by choosing what data is to be filtered and telling CDS how to filter it. The Filter dialogue window is the same whether you launch it to filter "On-the-Fly", as in our example, or if you build a permanent filter for a dynamic report, set, or mass mailing.

You will use the Filter dialogue window to define the three components of a filter –

1. The **Column Name** of the column containing the raw data to be filtered.

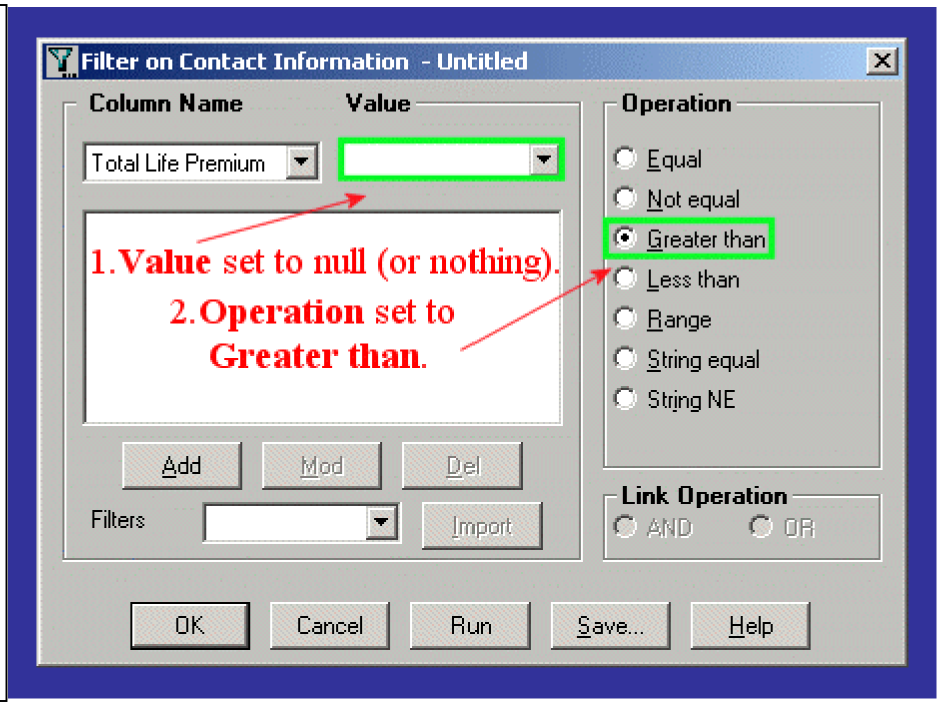
2. The **Value**, or data in the column that will be filtered.

3. The **Operation** that will determine which data is kept in view and which data is eliminated.



Note that, in our example, the column name - **Total Life Premium** - is already selected. If we had clicked the **Filter** cursor on the **Age** column heading, the **Age** column would be selected in the **Column Name** pull-down window.

With the **Total Life Premium** column already selected, we can input a value to filter on. The **Value** field is blank, or set to null. Contacts who carry life insurance will have some data entered in the **Total Life Premium** field, whereas the contacts without life insurance won't, as they are not paying a premium. We want to see only the clients who have some data/value entered in the **Total Life Premium** column so we will leave the **Value** set to null and in the **Operation** box, select **Greater than**.



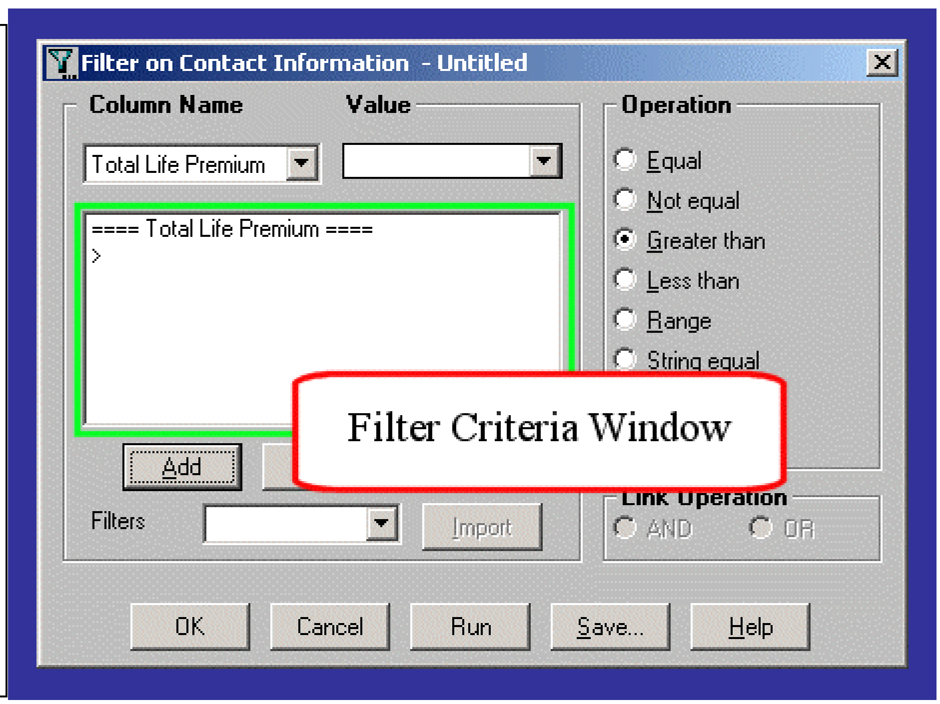
With the **Column Name** set to **Total Life Premium**, the **Value** set to **null** and the **Operation** set to **Greater Than**, click the **Add** button and the filter criteria are entered in the **Filter Criteria Window**.

The **Filter Criteria Window** reflects the choices made for **Column Name**, **Value**, and **Operation**–

The first line is the **Column Name** – **Total Life Premium**.

The symbol in the second line reflects the **Operation** choice. In this case - **>** - which means **Greater Than**.

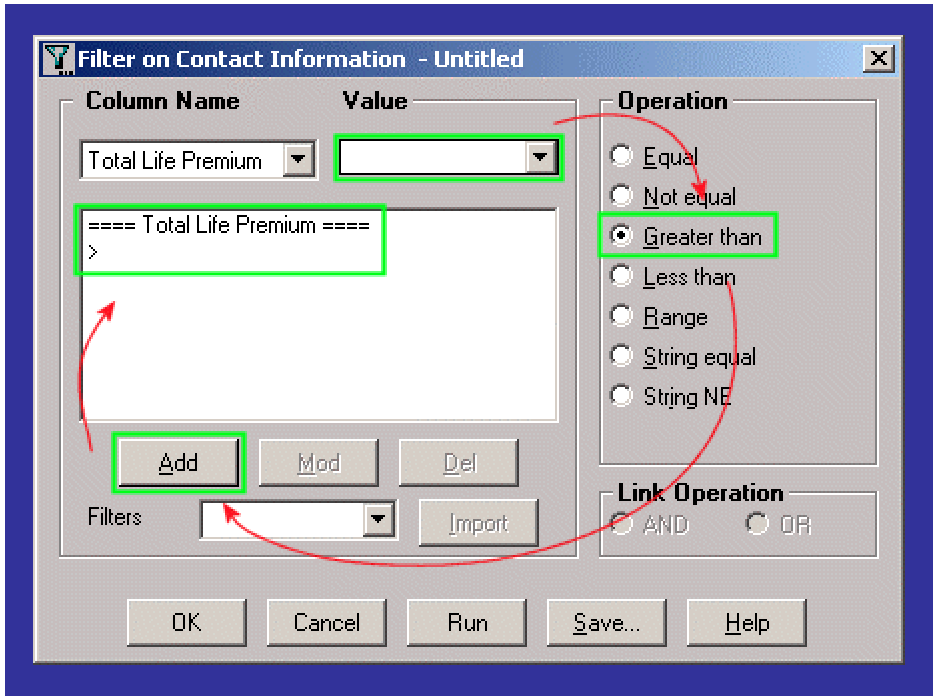
Following the symbol is the **Value** selected to filter on. In this case, no value is apparent as we set the value to **null**.



This **Filter Criteria** tells CDS to show us only the contacts with a value in the column **Total Life Premium**.

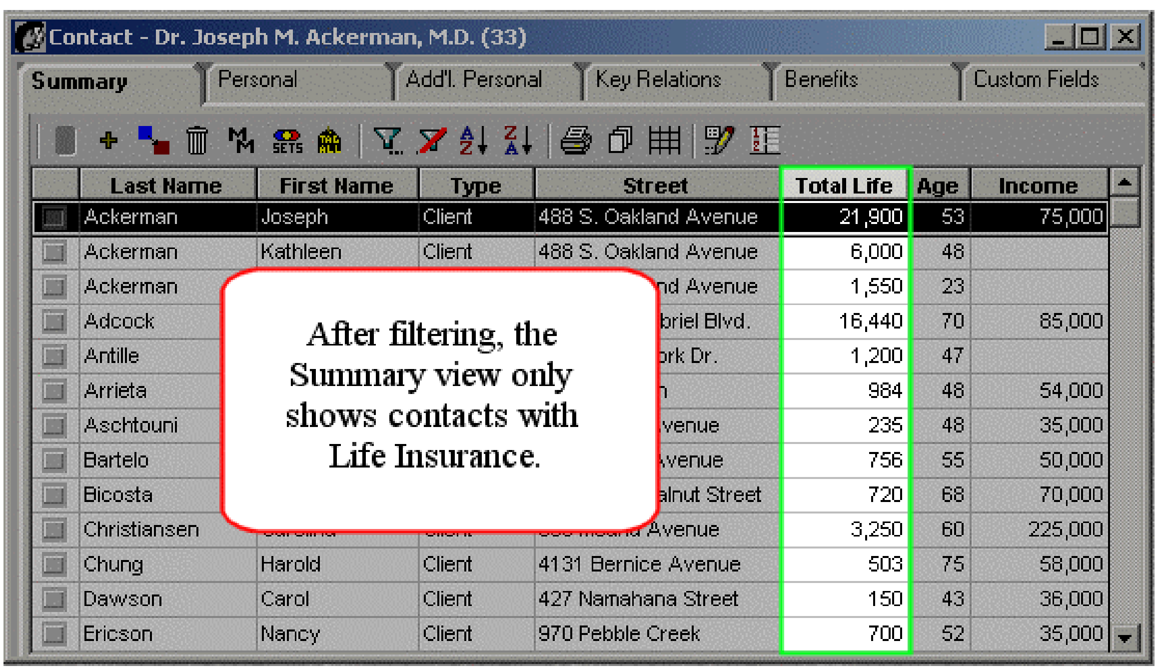
Quick Review:

- With the **Column Name** selected, enter the **Value** to be filtered.
- Select the filter **Operation**.
- Click the **Add** button.



With the Filter Criteria selected – Click the **OK** button.

The **Filter Criteria** window will disappear and you will see the Contact **Summary** screen again but only the contacts with a value entered in the **Total Life Premium** column will be included in the view.



All of the clients with no value entered in the **Total Life Premium** column have been filtered away.

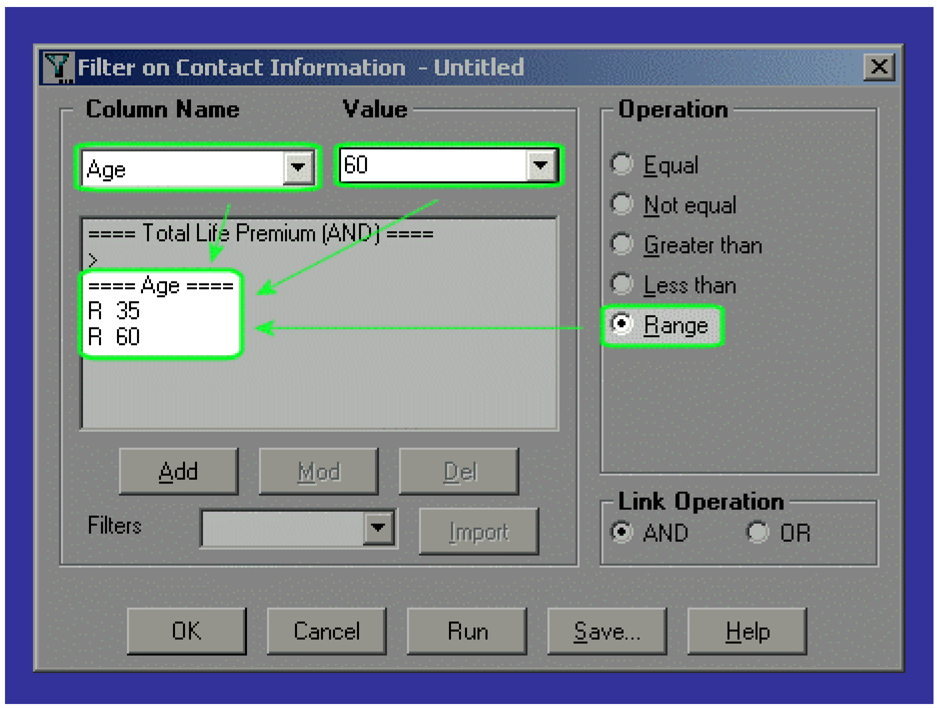
Next, we'll filter on the age column, selecting only the clients who are between the ages of 35 and 60.

- Click on the **Filter** button to activate the **Filter Cursor**.
- Move the **Filter Cursor** over the **Age** column header and left click.
- The **Filter** dialogue window will open again, this time with the **Age** column selected in the **Column Name** window. (Note that the filter criteria for the **Total Life Premium** column are still visible in the **Filter Criteria** window.)
- With the **Age** column selected, enter the number 35 in the **Value** window.
- In the **Operation** box select the **Range** operator.
- Click the **Add** button.
- The new criteria will be added to the **Filter Criteria** window.

Now add the second part of the range operation –

- Enter the number 60 in the **Value** window.
- With the **Range** operator still selected, click the **Add** button.
- The second half of the **Age** range criteria will be added to the **Filter Criteria** window.

The **Filter Criteria Window** now reflects the new filter choices – The **Age** column will be filtered on a **Range** between (and including) the **Values** of 35 and 60.



Note that the filter criteria for the **Total Life Premium** and **Age** columns are visible in the Filter dialogue window. This means that the filter will work for both columns at the same time.

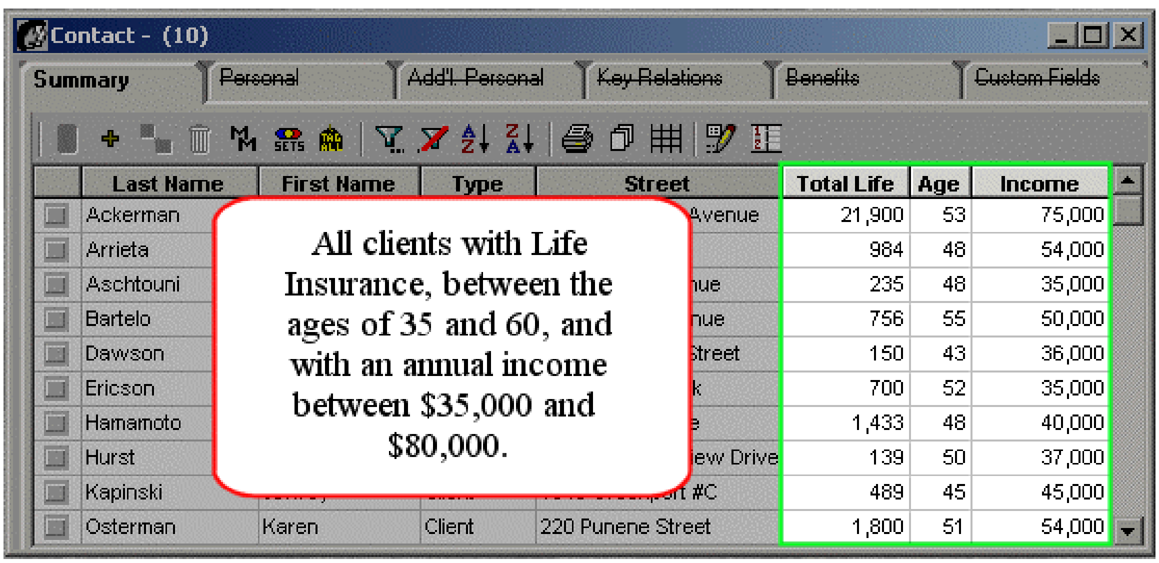
- With the **Age** filter criteria selected – click the OK button.

The contact Summary screen will reappear showing only those contacts between 35 and 60 years old with some form of Life Insurance.

Now we’ll use the same process to filter on the income data for the remaining clients.

- Click on the **Filter** button to activate the **Filter Cursor**.
- Move the **Filter Cursor** over the **Income** column header and left click.
- The **Filter** dialogue window will open again, this time with the **Income** column selected in the **Column Name** window. (Filter criteria for **Total Life Premium** and **Age** are visible in the **Filter Criteria** window.)
- With the **Income** column selected, enter the number 35000 in the **Value** window (a comma will be added in the criteria window).
- In the **Operation** box select the **Range** operator.
- Click the **Add** button.
- The new criteria will be added to the **Filter Criteria** window.
- Enter the number 80000 in the **Value** window.
- With the **Range** operator selected, click the **Add** button.
- Click the **OK** button.
-

Now the Summary screen shows us only the data that we want to see – all clients in our database between the ages of 35 and 60 that carry some form of Life Insurance and have an annual income between $35,000 and $80,000 a year.



Our Summary list has been narrowed down to see only the data we need to develop our marketing plan. From here, these filtered contacts can easily be added to a set that can be used for a group mailing or scheduling activities.

When you ‘Filter on the Fly’ in the Summary screen, you can quickly return your **Summary** view to an unfiltered view by using the **Unfilter** button.

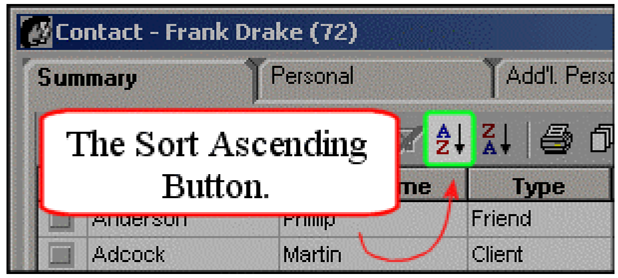
If you decide to filter your Summary view on different criteria or just decide to return to your original **Summary** view, simply click the **Unfilter** button and your original **Summary** view will return.

Sort

CDS also makes it easy to sort the data in the **Summary** view in either ascending or descending order.
For instance, if you wanted to target a specific set of clients for a mailing based on **Zip Code** but didn't want to build a filter –

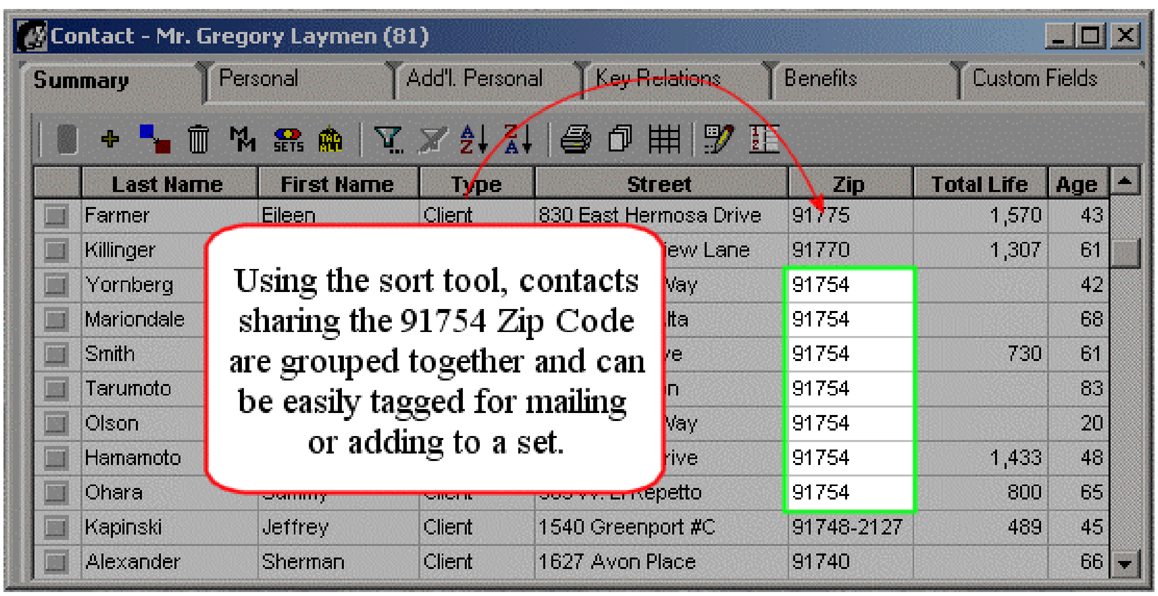
- Use the **Customize Layout** button to bring the **Zip** column into the **Summary** view.

- With the Zip column in the Summary view, click on the **Sort Ascending** button.

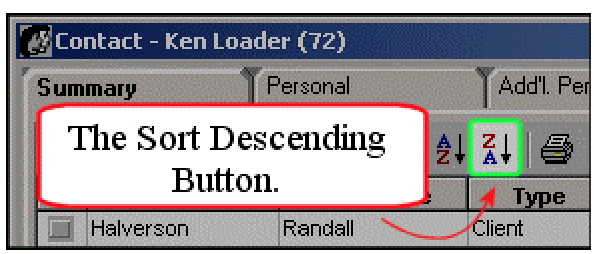


- Your cursor will turn into the same cursor with the hand we saw when clicking on the **Filter** button.
- Move the Sorting Cursor to the **Zip** column header and left click.
- The **Zip** column will be sorted in ascending fashion.

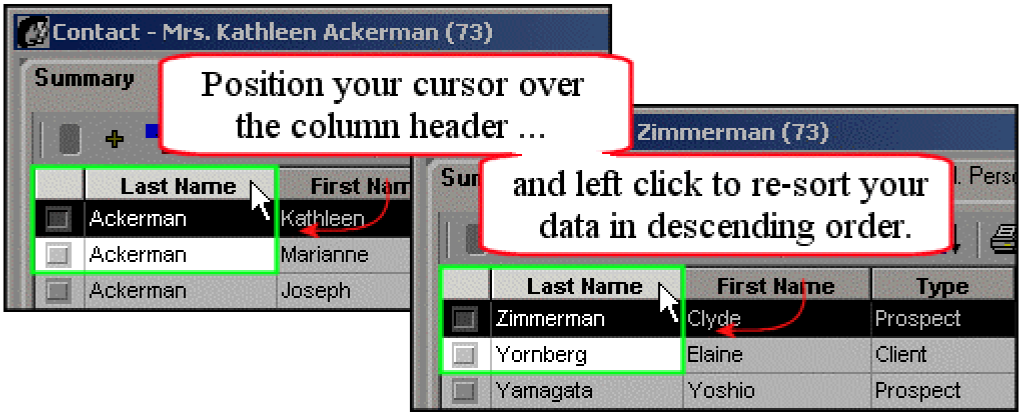
Now you can search for matching zip codes easily.



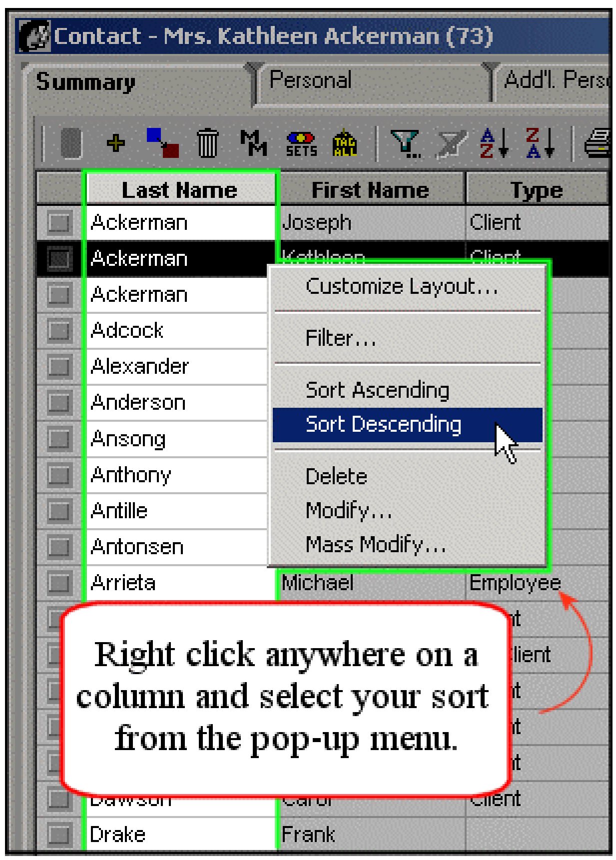
The **Sort Descending** button allows you to sort a given column in the opposite direction – lowest to highest or Z – A.



You can also sort data in a **Summary** view by clicking your mouse directly on a column header. When accessing the **Contact Summary** view, CDS sorts the information by last name, in ascending order. If you want to reverse the order and see your contacts that start with "Z" first, position your cursor over the **Last Name** column header and left click.



Finally, you can right click anywhere on a column and select **Sort Ascending** or **Sort Descending** from the pop-up menu.



You can Filter and Sort virtually any Summary screen in CDS including Dynamic Reports, To-Dos, Smart Pad Notes, Investments, Policies, Sets – you can even filter your Summary list of filters!