Before the Filter and Sets ComboBoxes can be used, the option must be turned on in the User Profile.

To access the User Profile –

- From the main screen in CDS, select the Database menu and click Modify Current Users Profile.
- When the User Profile opens, click on the Contact Record tab.
- In order for the Show Sets ComboBox and Show Filter ComboBox options to be available, the Show Indicators Option in the Contact Record Options section of the Contact Record tab must be turned on.

- The Show Sets ComboBox and Show Filter ComboBox options are located in the Indicator Options section of the Contact Record tab.

- To turn the ComboBox options on, place a check in the boxes to the left of the Sets and Filter ComboBox options.
- Click OK.

Note: If you have made a change to the User Profile, you will need to log out of CDS in order for the changes to take effect. If you have not made changes, click OK when prompted to log out and continue working.
After the options to use the **Sets** and **Filter ComboBoxes** have been turned on, two new drop-down fields will appear in the indicator bar at the bottom of the CDS screen when a contact summary screen is loaded: one for Sets and one for Filters.

![Screnshot of Sets and Filters ComboBoxes](image)

The ComboBoxes can be used to refine a contact search after a summary screen has been loaded.

To view the members of set in the contact summary screen:

- Click on the drop-down arrow in the **Sets ComboBox** drop-down field.
- Select the set with the membership to be viewed in the contact summary screen.
- The **Contact** summary screen will be reloaded with the membership of the selected set.

You can further refine your **Contact** summary view by applying the filter criteria of a saved filter to the set membership in view.

- With the set membership in view (the name of the set will be reflected in the Sets drop-down field and in the heading of the **Contact** summary screen), click on the drop-down arrow in the **Filters** drop-down field.
- Select the filter with the filter criteria to be applied to the set membership.
The list of contacts in the Contact summary screen will be reloaded based on the combination of set membership and filter criteria.

The combination of set membership and filter criteria will be reflected in the Sets and Filters ComboBox fields.

The list of contacts in the Contact summary screen will be reloaded with every change made to the Sets and Filter ComboBox fields. For instance, to see which members of a set meet different filter criteria, leave the entry in the Sets ComboBox field static and change the entry in the Filter ComboBox field. To see which set members of a different set meet the same filter criteria, leave the entry in the Filter ComboBox field static and change the entry in the Sets ComboBox field.