

Creating & Validating a Set

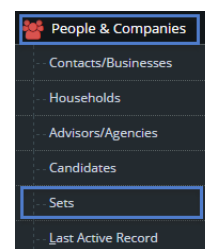
A Set is a method of grouping SmartOffice records. The individual records that make up the set are called “members” of the set. There are 2 kinds of sets – adhoc sets (add set members manually) and sets populated by a “filter”.

Users can create sets to make tasks many tasks easier. For example:

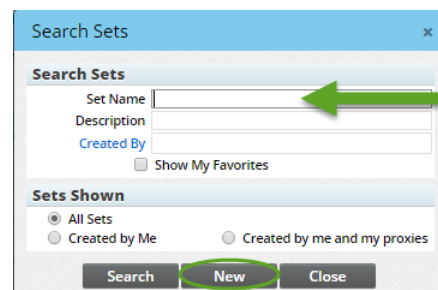
- Populate MarketEDGE360 with contacts from SmartOffice.
- Send correspondence to a set of contacts, all members of the set receive the correspondence (the correspondence is then sent to each contact individually).
- Search for contacts by limiting the search to a specified set of contacts instead of searching all contacts in the database.
- When setting up a Dynamic Report, limit the report’s results to those members of a set.

Creating a Set

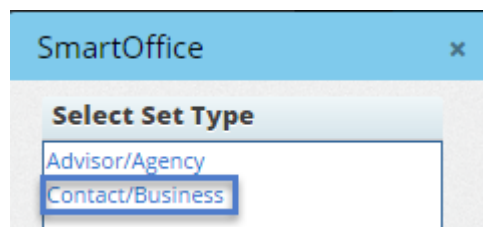
1. Click on “**People and Companies**” and select “**Sets**”.



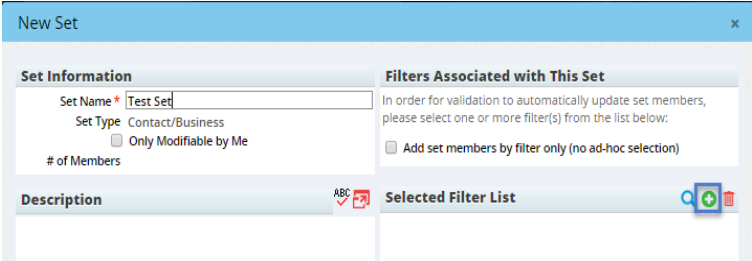
2. Type the **Set Name** on the box and **click NEW**.



3. Select “**Contact/Business**”.

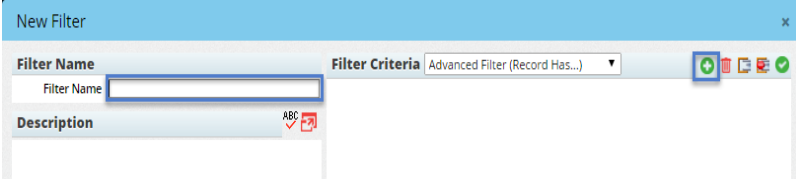


4. Create a Filter by clicking on the  sign.



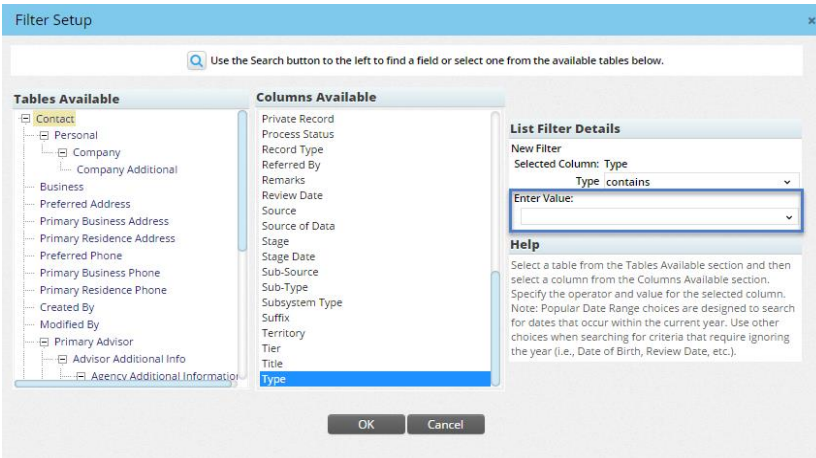
The 'New Set' dialog box has a title bar with a close button. It is divided into two main sections. The left section, 'Set Information', contains a 'Set Name' field with 'Test Set' entered, a 'Set Type' dropdown set to 'Contact/Business', and an unchecked checkbox for 'Only Modifiable by Me'. Below these is a '# of Members' field. The right section, 'Filters Associated with This Set', contains a text box explaining that filters are used for validation and a checkbox for 'Add set members by filter only (no ad-hoc selection)'. At the bottom, there is a 'Description' field and a 'Selected Filter List' section with a search icon, a plus icon, and a trash icon.

5. A new window will open. Name the Filter and select



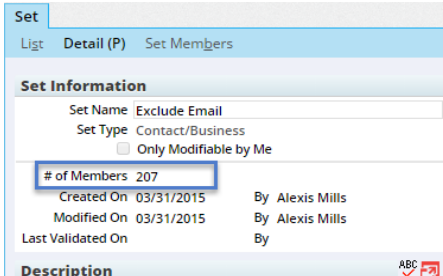
The 'New Filter' dialog box has a title bar with a close button. It contains a 'Filter Name' field with 'Filter Name' entered, a 'Filter Criteria' dropdown set to 'Advanced Filter (Record Has...)', and a plus icon. Below the name field is a 'Description' field with a search icon and a plus icon.

6. Search for the field where the info is included in all your records.
7. Enter the words found in the records in the “**Enter Value**” box and click Ok.



The 'Filter Setup' dialog box has a title bar with a close button. It features a search bar at the top. Below it are two panes: 'Tables Available' on the left and 'Columns Available' on the right. The 'Tables Available' pane shows a tree view with 'Contact' selected. The 'Columns Available' pane shows a list of fields with 'Type' selected. To the right of these panes is the 'List Filter Details' section, which includes a 'New Filter' section with a 'Selected Column' dropdown set to 'Type' and an 'Enter Value' field. Below this is a 'Help' section with instructions. At the bottom are 'OK' and 'Cancel' buttons.

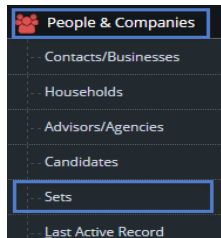
8. A box will appear showing the number of people in your set.



The 'Set' dialog box has a title bar with a close button. It contains a 'Set Information' section with a 'Set Name' field set to 'Exclude Email', a 'Set Type' dropdown set to 'Contact/Business', and an unchecked checkbox for 'Only Modifiable by Me'. Below this is a '# of Members' field showing '207'. Further down are fields for 'Created On' (03/31/2015), 'Modified On' (03/31/2015), and 'Last Validated On'. To the right of these are fields for 'By' (Alexis Mills). At the bottom is a 'Description' field with a search icon and a plus icon.

Validating a Set

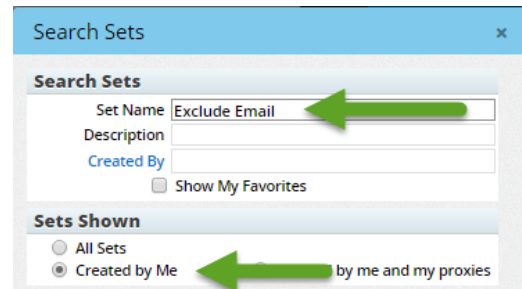
9. Click on “**People and Companies**” and select “**Sets**”.



The 'People & Companies' menu is a vertical list of options. The options are: 'People & Companies', 'Contacts/Businesses', 'Households', 'Advisors/Agencies', 'Candidates', 'Sets', and 'Last Active Record'. The 'Sets' option is highlighted with a blue border.

10. Type the **Set Name** on the box.

11. Select “**All Sets**” or “**Created by Me**” On the **Sets Shown** box and press Search.



Search Sets

Set Name: Exclude Email

Description:

Created By:

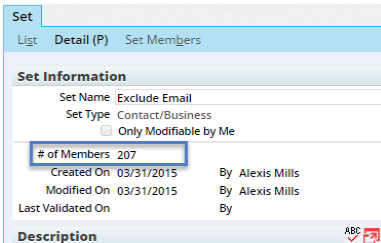
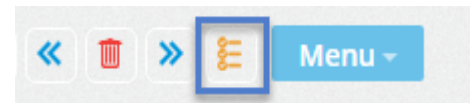
☐ Show My Favorites

Sets Shown

☐ All Sets

☒ Created by Me by me and my proxies

12. Click on the **Validate Current Set** Icon to update the set.



Set

List Detail (P) Set Members

Set Information

Set Name: Exclude Email

Set Type: Contact/Business

☐ Only Modifiable by Me

of Members: 207

Created On: 03/31/2015 By: Alexis Mills

Modified On: 03/31/2015 By: Alexis Mills

Last Validated On: By:

Description:

NOTE: If changes were made to the set, you will be able to See the number of members in the set change.

We Can Help!

For **browser, access or technical issues**, call the Support Line at **1-800-499-8820**.

For **specific tasks or questions** about using SmartOffice, send an email to SmartOffice@glic.com.