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 – adhhoc sets (add set members manually) and sets populated by a "filter".

Users can create sets to make tasks many tasks easier. For example:
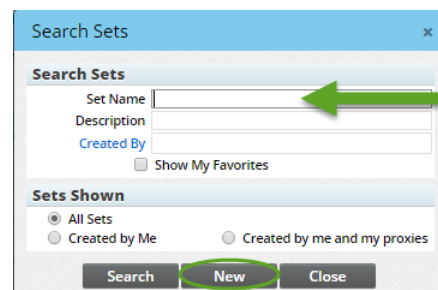
- Populate MarketEDGE360 with contacts from SmartOffice.
- Send correspondence to a set of contacts, all members of the set receive the correspondence (the correspondence is then sent to each contact individually).
- Search for contacts by limiting the search to a specified set of contacts instead of searching all contacts in the database.
- When setting up a Dynamic Report, limit the report's results to those members of a set.
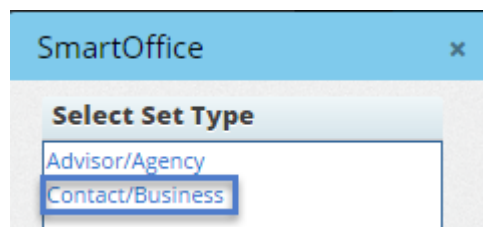
Creating a Set

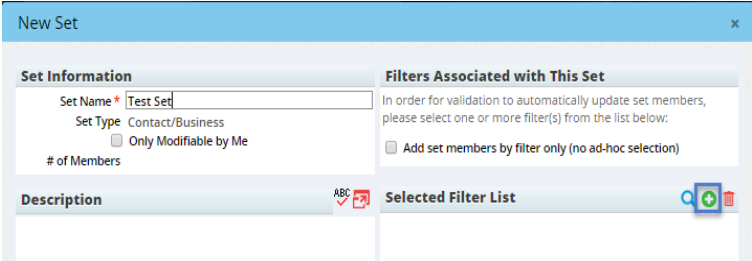1. Click on "**People and Companies**" and select "**Sets**".
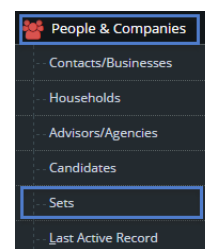
2. Type the **Set Name** on the box and **click NEW**.
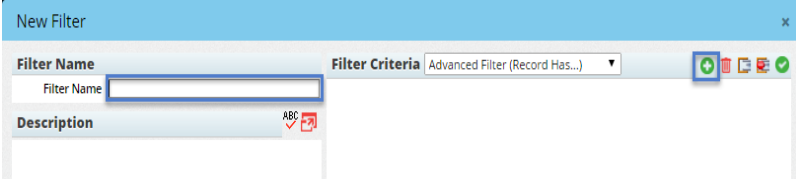
3. Select **"Contact/Business"**.
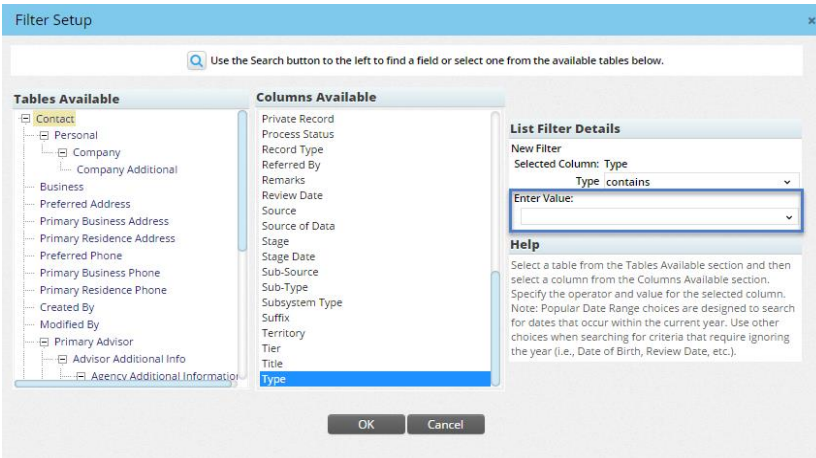
4. Create a Filter by clicking on the ⊕ sign.

5. A new window will open. Name the Filter and select
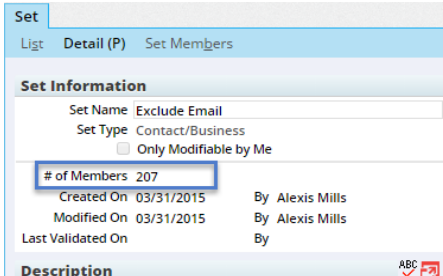
6. Search for the field where the info is included in all your records.

7. Enter the words found in the records in the "**Enter Value"** box and click Ok.
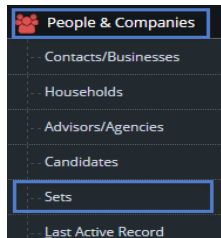
8. A box will appear showing the number of people in your set.

Validating a Set

9. Click on "**People and Companies"** and select "**Sets".**

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

11. Select **"All Sets"** or **"Created by Me"** On the **Sets Shown** box and press Search.
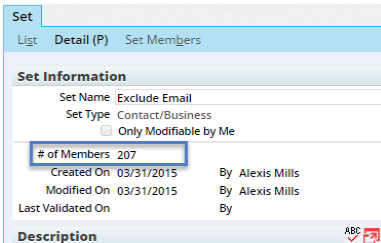
12. Click on the **Validate Current Set** Icon to update the set.
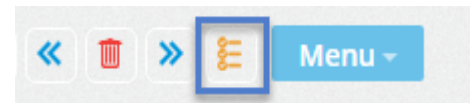
NOTE: If changes were made to the set, you will be able to See the number of members in the set change.

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.