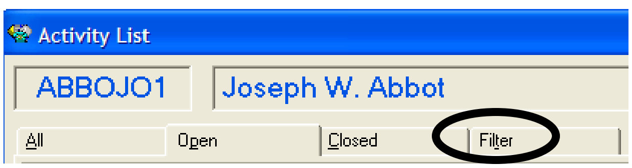
AIS Technology's Give It A Try! Tip
TAM® Filters

There is so much information in your management system… and it just keeps growing! The ability to quickly filter the information is already at your fingertips – you just need to explore the Filter Tab.

You will find the filter tab in the following lists – Customers, Prospects, Policies, Activities, Memos, Claims, Transactions (Invoices), and Attachments. Since each one of these screens has very different information – each filter screen is going to have different configuration options.

To set up a filter for you Customers or Prospects list, from that list, click on Options, then Customer Filter (or Prospect Filter), and Filter Set-up. This will allow you to limit what you see in your list screen based on what you set your filter for.

Finding filter options are the same for Policies, Activities, Memos, Claims, Transactions and Attachments. Go to the appropriate button (policy, activity, etc.) and double click on the filter tab at the top of the list. This will bring up your filter options. Once you have completed the appropriate options, click ok. You will then be brought to the filtered list, per your exact specifications!



Filtering does NOT remove any data from your management system, it simply limits what you can see based on what you asked for.

When you are done looking at the filtered view, simply click back to the All tab at the top of the list and you will brought back to the list in it's entirety.

Why would you use a filter??? Let's say a client calls and wants the status of task that someone in your office is working on. The client doesn't know the name of the person they spoke to… all they know is they called in October. You can't find any open activities for this client, but there are a whole lot of closed activities to shift through. By double-clicking on the filter tab and setting the Date Entered Filters to 10/01/2007 and 10/31/2007, you will be shown every activity entered for that client in October. You can quickly see that a CSR not only handled the task, they sent a follow-up letter to the client's home. The client must have missed it… go figure!

A couple of things to keep in mind…

- Filters do not clear themselves, so every time you go to set up a filtered view, start by clicking the reset button at the button of the filter setup window, just to make sure all the settings from a previous filter have been cleared.
- Filters are only as good as the information in your system. You can't filter for information that does not exist.

And that's an introduction to TAM® filters, so…

Give It A Try!