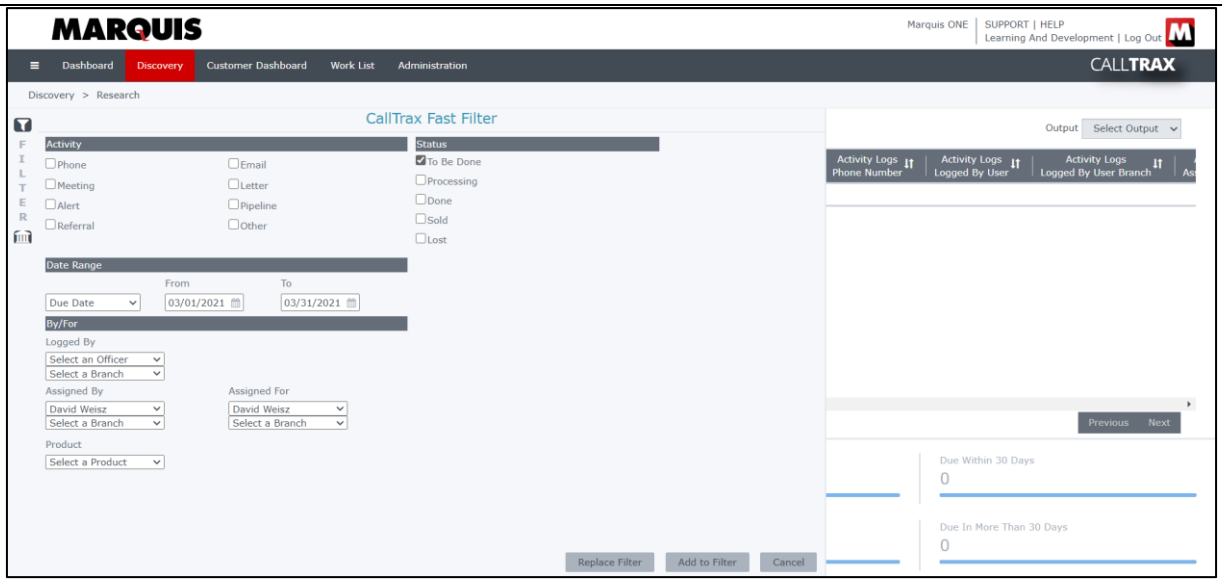
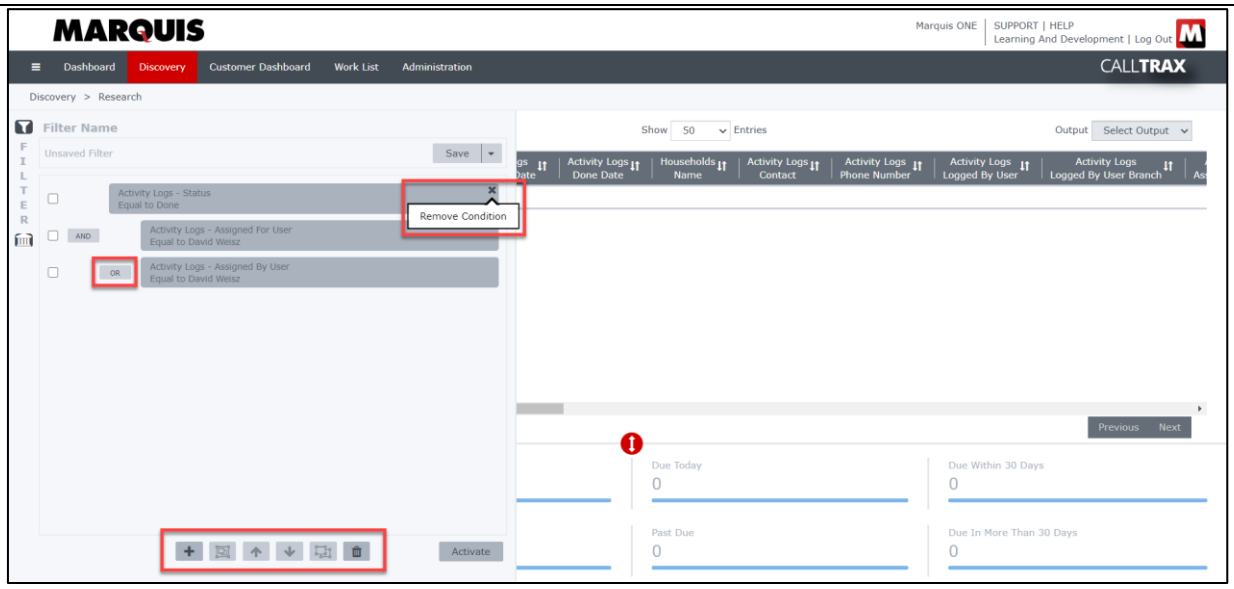
MARQUIS

CLTX202	CallTrax NEXT Fast Filter Overview
	The following procedures will guide through creating filters using the Fast filter method available in the Discovery tool within CallTrax NEXT.
Order of Steps	**Tasks**
Step 1	Log into **CallTrax NEXT**
Step 3	On the landing page, click on **Discovery** from the main menu
Step 4	Click **Research**
Note: CallTrax NEXT has a short cut to assist with making filtering quicker and easier called the Fast Filter.	
Step 5	To utilize the Fast Filter options, click on the fast filter **icon**
5.1	Place a check mark in any box next to a desired status or field content to **select** it
5.2	Click the drop-down arrow to make a selection for any field that contains a list to choose from
5.3	Type in date ranges or select them from a calendar box in the **From** and **To** date fields in order to establish a desired time frame
Step 6	Once all desired selections are made, there are two buttons to choose from for applying the filter selections:
	• **Add to Filter:** Clicking this option will append the selected filter conditions to whatever existing filter is in place within the filter window.
	• **Replace Filter:** Clicking this option will overwrite the existing filter with only the filter selections made within the Fast Filter window.
	
6.1	The Add to Filter and Replace Filter will bring up the filter window with all of the selected conditions in place
Step 7	Change the connector, if needed
7.1	The default connector is **AND**
7.2	To switch it to "**OR**", click on the connector to toggle between connector options
Step 8	To group 2 or more "**OR"** statements, place a **check mark** in the boxes to the left of the filter condition boxes
8.1	Click the "**Group Conditions**" button , located directly to the right of the plus symbol.

Note: The Group Conditions is used when needing to combine more than one OR condition to apply as a single application. For example, if we are looking to find records that are Retail and have either $30,000 in Deposits OR $50,000 in Loans, we would want to group the deposit and loan conditions in order to apply the Retail condition to both.	
Step 9	To ungroup conditions, place a **check mark** in the boxes to the left of each filter condition box that has been grouped
9.1	Click the "**Ungroup Conditions**" button , located directly to the left of the trash can symbol.
Step 10	To remove a filter condition, click the "**X**" in the upper right hand corner of the condition box
	
Step 11	To apply the filter just built, click the **Activate** button on the bottom right hand side of the filter box
11.1	The filter window should slide away, displaying those records that match the filter criteria just activated
11.2	If the **Filter** window doesn't slide out of view, click the **Filter** icon to toggle it out of the way to view the qualified records
Step 12	To remove ALL filter condition boxes within the window, click the button at the bottom of the filter window