

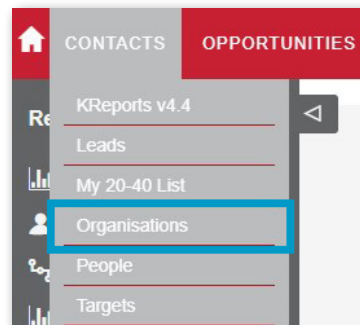
fibrecrm

HEART
OF THE
PRACTICE

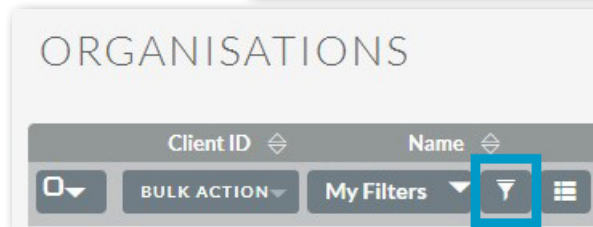
Visit support.fibrecrm.com for more info or contact your CRM Manager

Creating a Saved Search/ Filter

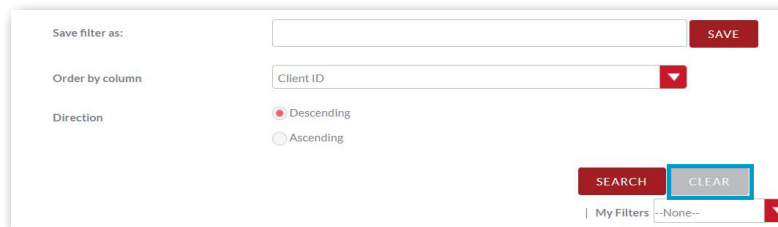
1. Navigate to the module you want to search in. For this example we'll be using **Organisations**



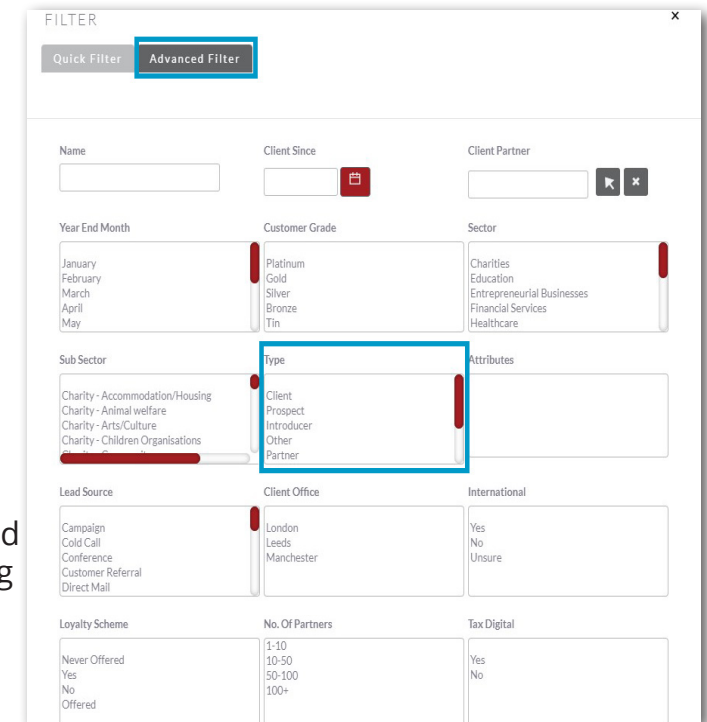
2. In **Organisations** select the **Filter** icon.



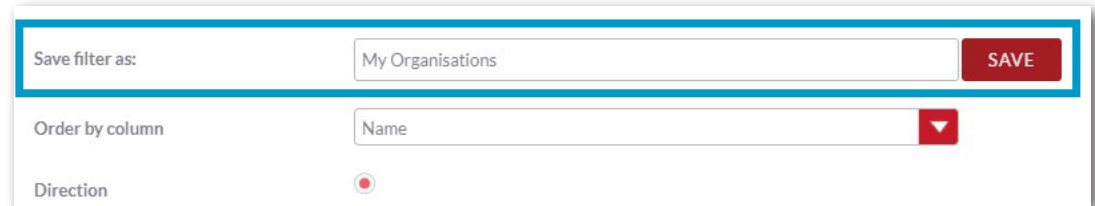
3. In the pop-up window, go to the **Advanced Filter** tab and then scroll to the bottom and hit **Clear**. This will remove any search parameters you had applied before creating the new search.



4. At the top of the **Advanced Filter** tab, you can select what you would like to filter by. You can select multiple sections for the Filter for example; **Customer Grade - Gold** in the **Charities Sector**. If you want to see more than one thing in a section hold down **Ctrl** and left clicking all the options you would like.



5. In the **Save Filter as** box, name your filter. Also select the **Order by** column in the drop down menu. Once done click **Save**.



6. The filter will now be applied and CRM will search for what you've set. To remove the filter click the little red X. To reapply the filter select the **My Filters** option and choose your saved filter.

