fibreCRM

HEART OF THE PRACTICE

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Adding Search Filters to Reports

1. In your **Reports** in FibreCRM, you can add a **Search/Filter Criteria** section to the report, this section lets you or other users narrow down or find specific results of the report. To add a Search/Filter Criteria section navigate to the report you'd like to add it to and in the report select **Edit**.
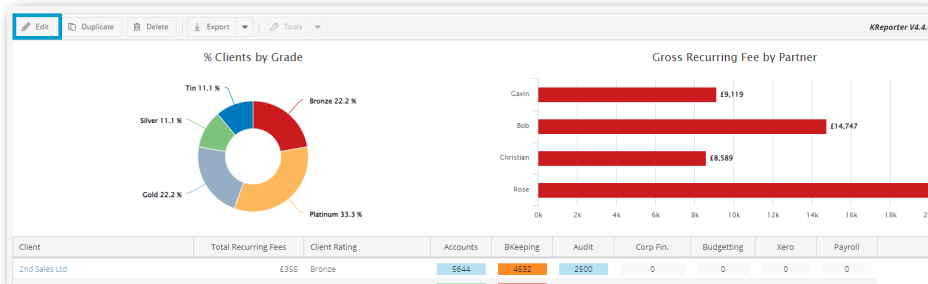
2. Select the **Integrate** tab. In the list scroll down to the **Saved Filters** section and click the lightbulb to turn on the Saved Filters section (the lightbulb will be lit up red if switched on) and then click **Save**.
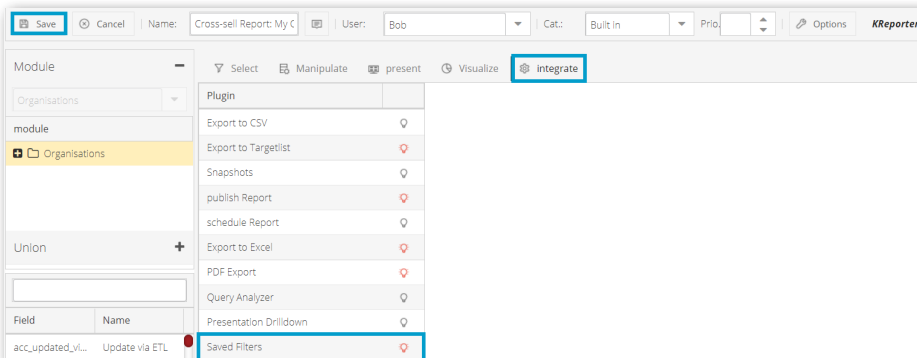

3. Next go the **Select** tab in the report this is where you can apply filters. Drag and drop fields you'd like to filter by from the **Field** to the **Path** section.
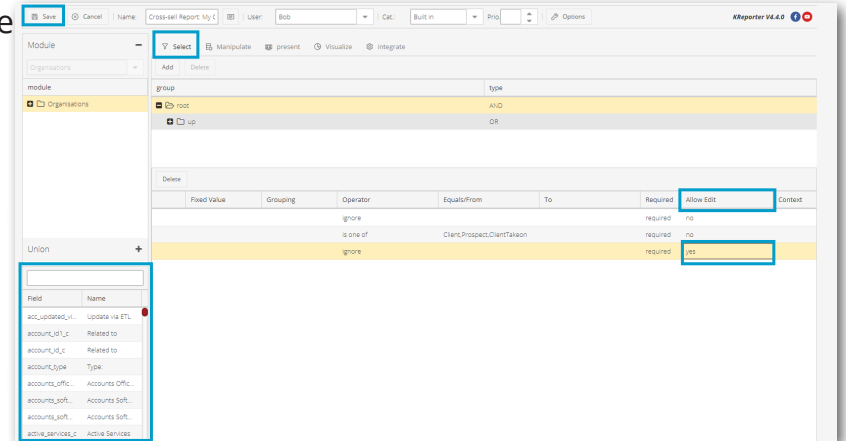
To be able to edit a filter without editing the report you'll need to scroll across to the **Allow Edit** column in the path section and select **Yes** from the drop down menu. Once done click **Save**, users will now be able to filter the report when viewing.

4. To save a filter so it can be picked from the filters drop down menu on the report. Fill in the criteria you'd like to filter by and then click the **Save Filters** icon.
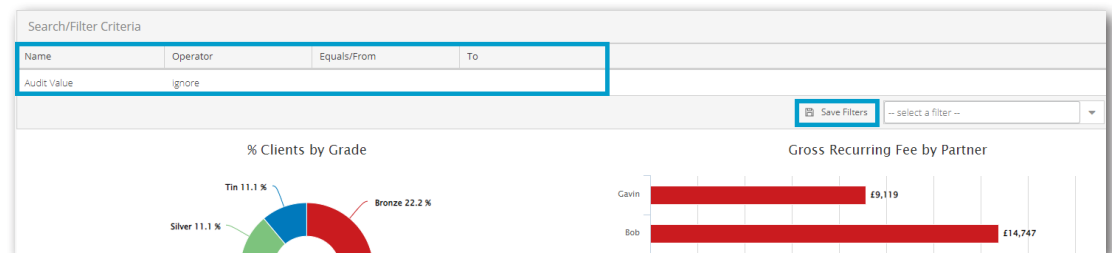
5. A pop up box will then appear, give the filter a name and the select the tick box if you'd like to make this filter available for all users. Once done click **Save**. Your new filter will now be available to apply from the drop down menu. To apply the filter select it from the drop down menu and it will automatically load up the filter.