fibreCRM

HEART OF THE PRACTICE

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Copy a Saved Filter to Another User or Security Groups

1 In FibreCRM you can create and save **Filters** in modules across the CRM so you can quickly access records that are more relevant to you instead of a long list of every record available. Once you've created and saved the Filter it will be available for you to apply at any time, however you also have a copy filter option so you can copy the Filter to other **Users** or **Security Groups**.

2. To copy a **Saved Filter** to another User or Security Group. First navigate to the module where the filter you'd like to copy is. Click on the **My Filters** tab and in the drop down menu select the **Copy Filter To** option.

OR	G	ANISAT	IONS	
		Client ID 🔶	Name	: ⇔
0-		BULK ACTION	My Filters 🔻	▼ ≡
	/	ADA00080	Copy Filter To	nd Remers
		ALL00052	sh Bank Client List Bank	sh Bank
		BAR00072		Bank
	-	BAT00051	Default Search	er Monkhouse
		BEG00081		Traynor
		BIR00058	opserview	

3 A **Pop Up** box will then appear, here you can select the filter you'd like to copy and whether that filter will be copied to either a security group or another CRM user.

Select the filter that you which to copy, then select either a security group or and individual user
Select Filter
Select Security Group: Select Security Group COPY TO SECURITY GROUP
OR
Select User: COPY TO USER
CLOSE

4. To copy your filter to a Security Group, select the Filter from the drop down list and then select the Security Group from the drop down list. Once done select Copy to Security Group. The Filter will then be copied.

Select the filter that you which	to copy, then select either a security group or and individual user
Select Filter: Client List	
Select Security Group: Global	COPY TO SECURITY GROUP

5 To copy your filter to another **User**, select the Filter from the drop down list and then select the User from the drop down list. Once done select **Copy to User**. The Filter will then be copied.

Select Filter:	Client List					
Select Securi	ity Group:	Select Securit	y Group	СОРҮ ТС	SECURITY GROU	UP
OR						
Select User:	Anna Ban	ana 🔽	COPY TO US	SER		