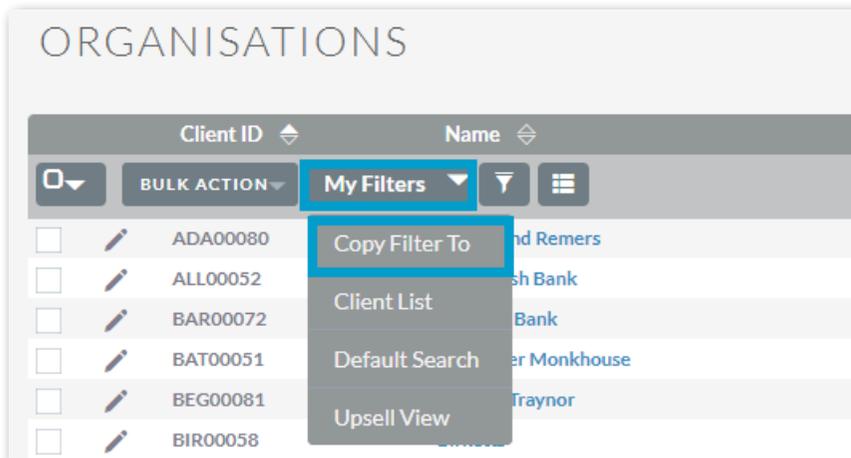


Visit support.fibrecrm.com for more info or contact your CRM Manager

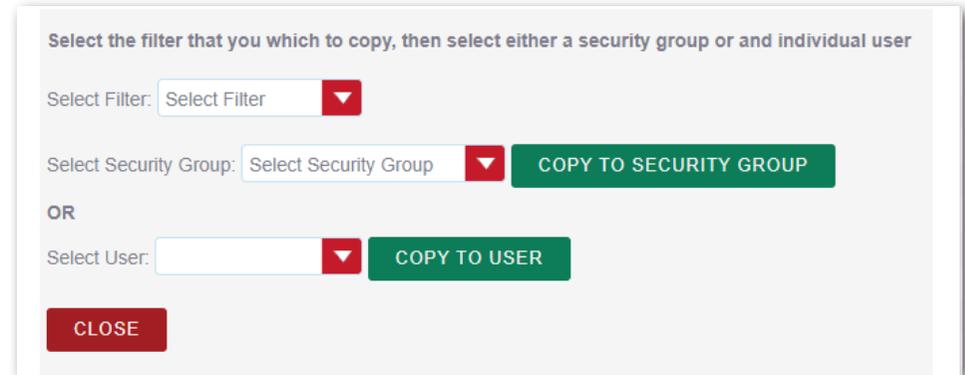
Copy a Saved Filter to Another User or Security Groups

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**.

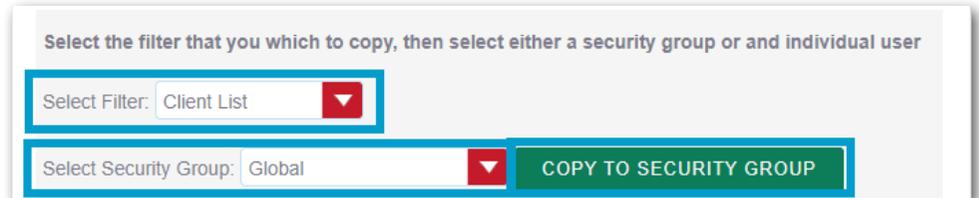
2. To copy a **Saved Filter** to another User or Security Group. First navigate to the module where the filter you'd like to copy is. Click on the **My Filters** tab and in the drop down menu select the **Copy Filter To** option.



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.



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.



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.

