

# CRM: Quick vs Advanced Filters

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Quick and advanced filters are available when viewing the Gift and Contact listings.

**Quick Filters:** allow you to quickly search based on basic information such as dates, name, address, or tags

**Advanced Filters:** are set up by selecting Filters from the left navigation which allow for more advanced and precise options and can be saved to easily pull the same information in the future.

## Create Custom Filter

1. From the left navigation, select **Filters**
2. Click **Add Filter**
  - In the dropdown labeled 'Show Me', select between **Activities, Contacts, Pledges, or Transactions**
  - In the dropdown labeled 'where the', select the correct logic option that meets the needs of your search
  - Add additional conditions if needed
  - Once complete, click **Save**

### Quick Filter Selection Items

### Advanced Filter Selection Items

*These are set up under Filters and allow for more specifications to filter on.*

## Gifts Search

<input type="text" value="Search (Try 'John Smith June 2020 \$5000')"/>	Show gifts from <input type="text" value="Pick Date"/> to <input type="text" value="Pick Date"/>	<input type="button" value="SUBMIT"/>
<input type="checkbox"/> Include refunds / voids	Advanced Filter <input type="text" value="Select filter"/> <input type="checkbox"/> Invert Filter	

## Contacts Search

<input type="text" value="Search by name or address"/>	Last donated from <input type="text" value="Pick Date"/> to <input type="text" value="Pick Date"/>	<input type="button" value="APPLY"/>
Tags <input type="text" value="Select Value"/>	Total donated from <input type="text" value="\$ 0.00"/> to <input type="text"/>	
	Advanced Filter <input type="text" value="Select filter"/> <input type="checkbox"/> Invert Filter	