

CRM: Quick vs Advanced Filters

Last Modified on 08/09/2023 1:23 pm PDT

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.

Quick Filter Selection Items

Advanced Filter Selection Items

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

Gifts Search

The screenshot shows the Gifts Search interface. A purple box highlights the search input field containing the text "Search (Try 'John Smith June 2020 \$5000')". Below it is a checkbox labeled "Include refunds / voids". A teal box highlights the "Advanced Filter" section, which includes a "Select filter" dropdown menu and an "Invert filter" checkbox. Above the advanced filter section, there are two date pickers labeled "Pick Date" separated by a "to" label, and a "SUBMIT" button.

Contacts Search

The screenshot shows the Contacts Search interface. A purple box highlights the search input field containing the text "Search by name or address". Below it is a "Tags" section with a "Select Value" dropdown menu. A teal box highlights the "Advanced Filter" section, which includes a "Select filter" dropdown menu and an "Invert filter" checkbox. Above the advanced filter section, there are two date pickers labeled "Pick Date" separated by a "to" label, and a "Total donated from" field with a "\$ 0.00" value. A "APPLY" button is located to the right of the date pickers.