

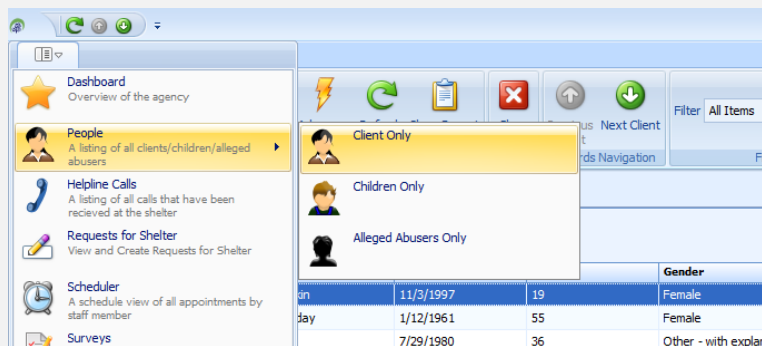
How to Create Advanced Filters in List Views

List views show complete lists of different objects in the software that can be sorted and filtered to display more specific information.

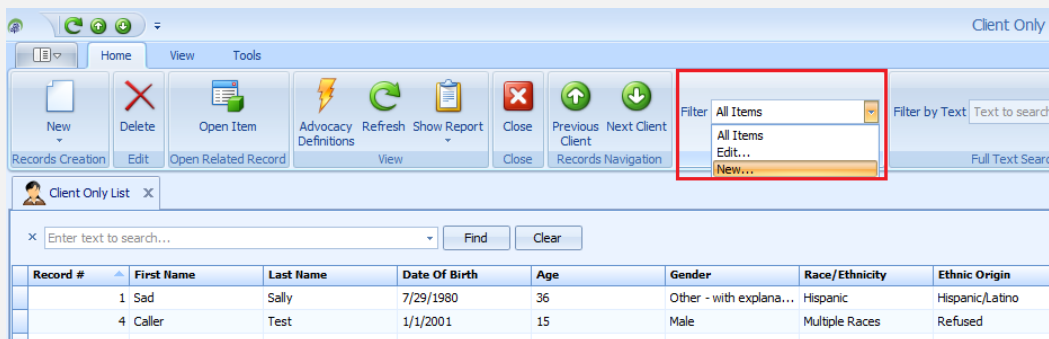
This guide will explain how to apply advanced filters to list views.

*Please note that the terminology may vary between implementations. One agency may call Services Activity Session, while another may call them Client Services.

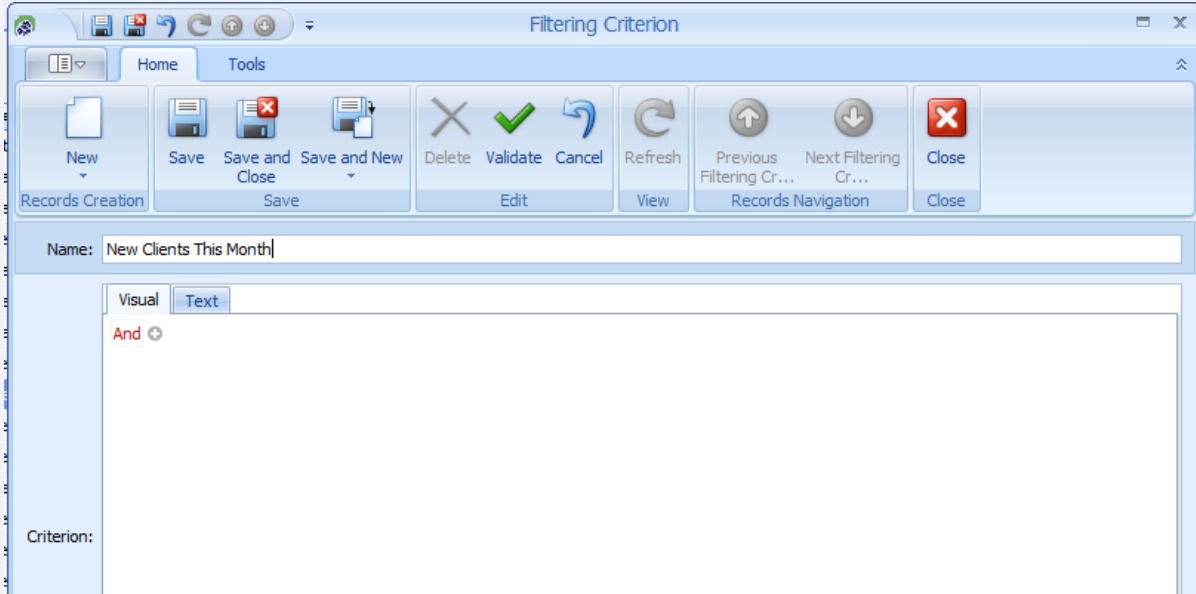
- 1) To start, click on the Navigation Button in the top left corner to access the available lists. To view a list of clients, hover over People and select Client Only.



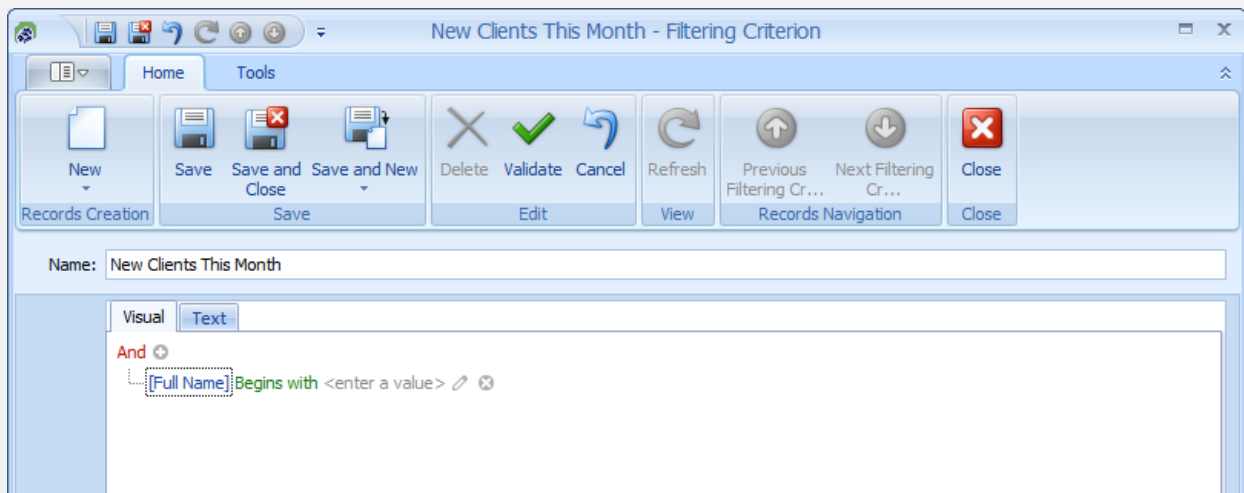
- 2) Click on the drop down menu at the top of the screen in the filter section, click New.



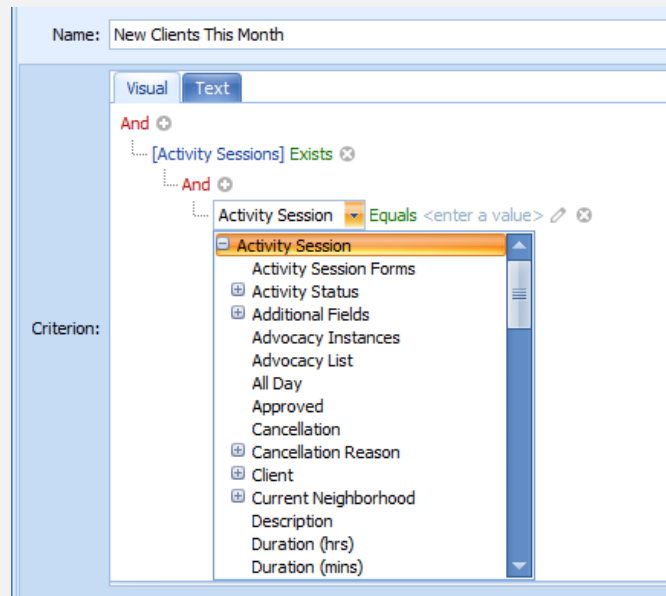
3) The Filtering Criterion window will open. Give the filter a name by typing in the Name textbox.



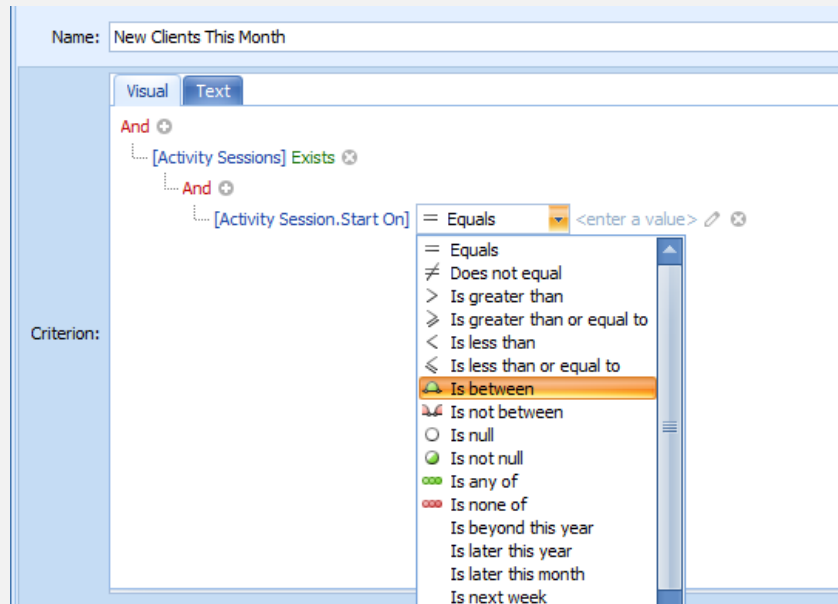
4) Click the + sign to add a filter field. By default, the first field added will be Full Name. Click on Full Name to see all the fields that a client has.



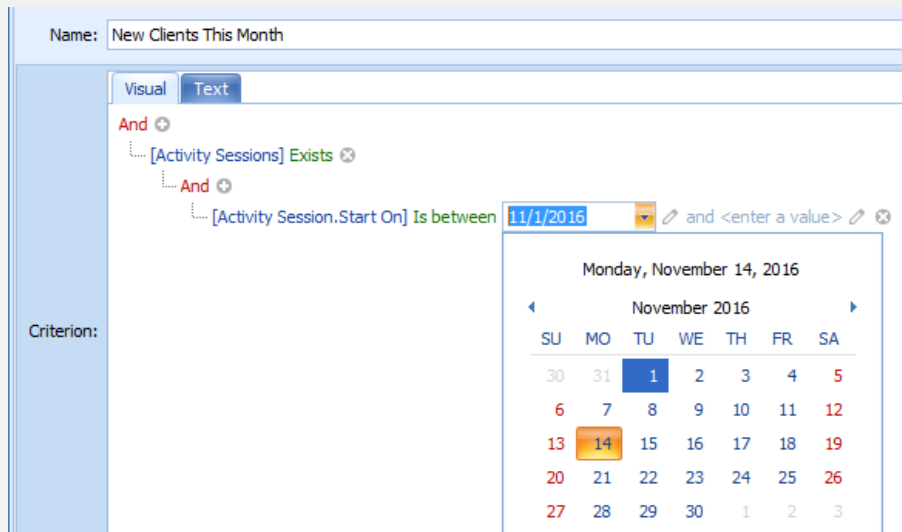
5) To add more filters click the + next to the new, and then select another field from the list.



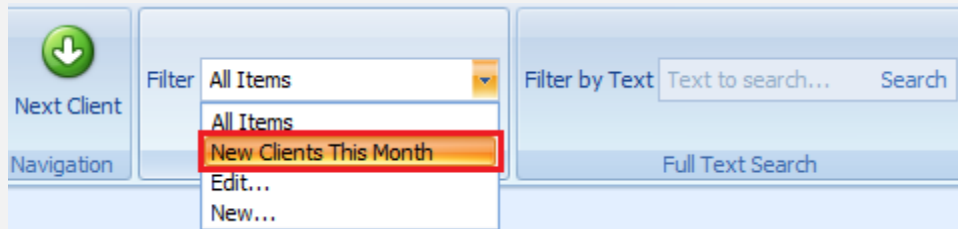
6) Click on Equals to choose how the filter is applied.



7) Filter the details further by clicking <enter a value>.



8) To apply the newly created filter, click on the drop down in the filter box and choose the filter.



9) To remove the filter, click on the Filter drop down and select All Items.

10) To edit the filter, click on the Filter drop down and select Edit.

