Add a Filter

Filters can be applied to Client List and Client Summary gadgets in your dashboards.

Search criteria are key to building useful dashboard components. Refer to Dashboard Elements and Element: Search Criteria for details and examples.

You can add a single term, a set of criteria, or multiple sets of criteria.

To add filters, follow these procedures:

- Build your search
- Specify and order columns
- View your search results
- Name, share, and save your filter

If you have the appropriate role, you can include archived and deleted clients in your search.

You may also be able to create a new filter by copying an existing filter.

To build your search

Click the **Filters** tab.

To specify and order columns

Your filter needs to include at least one column if you want to use it in a Client List gadget. By default, several column choices are already selected. You can add to and change columns for the filter.

1. Click the **Columns** button.
2. In the list, select the check box for each column you want to include. The column moves to the top of the list.
3. To remove a column, clear its check box.
4. In your selected columns, click and drag columns to set the order you want.
5. Click the column by which you want to sort your search results.
6. Click outside the list to close it.

To view your results

1. Click **Search**.
2. If you want to change your search criteria, click **Refine Search** and repeat the appropriate steps.

To name, share, and save your filter

1. Click **Save As**.
2. Enter the filter's **Name**.
3. If appropriate, enter its **Description**.
4. If you want to share this filter, set or change sharing.
5. Click **Save**.