

## Filters Tutorial

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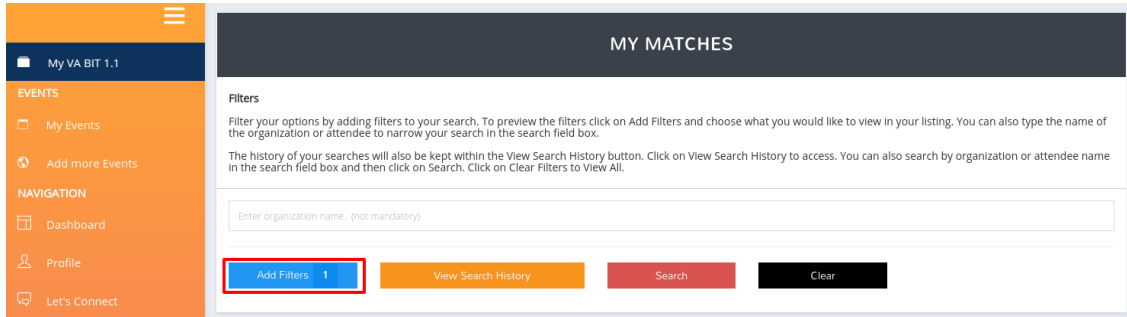
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# UTILIZING FILTERS

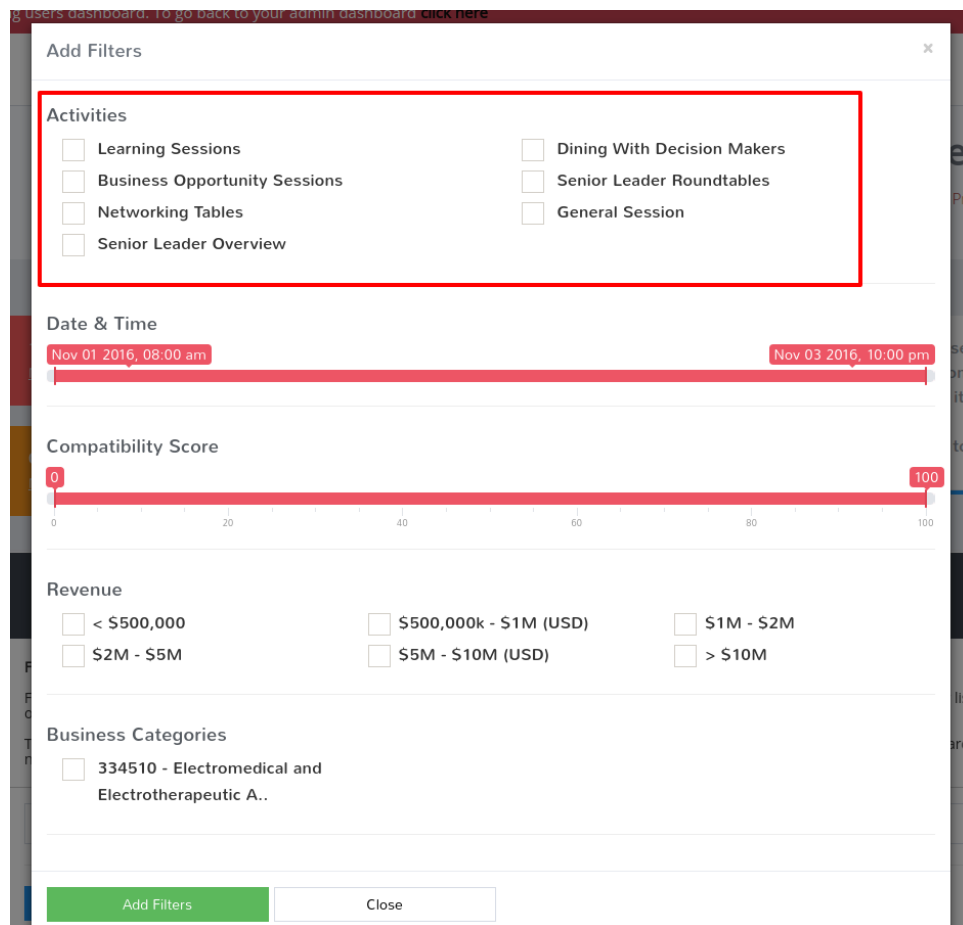
Filters allow you to search for matches or activities based on Activity type, Date and Time, Compatibility Score, Revenue and Business Categories.

## Features

1. To access the filters click the Add Filters button  
a)



2. You will see the pop-up shown below



### 3. Filter by the desired fields

#### a) Activities

- Use the check boxes to selected the desired Activities

#### b) Date & Time

- Use the slider to narrow the Date & Time range to the desired times

#### c) Compatibility Score

- Use the slider to narrow the scores to the desired range

#### d) Revenue

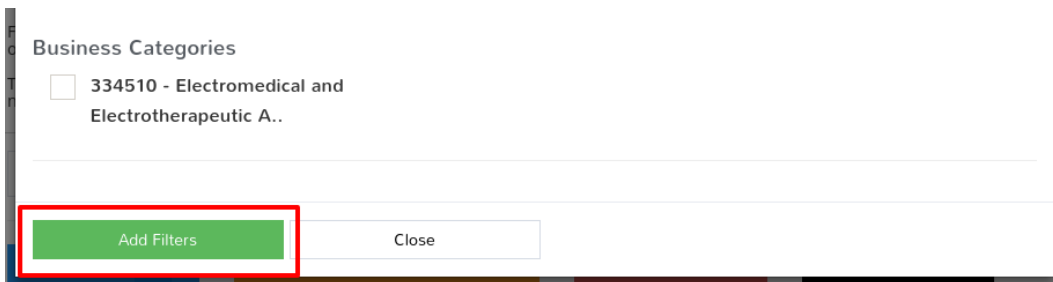
- Use the check boxes to selected the desired Revenues

#### e) Business Categories

- Use the check boxes to select the desired Business Categories

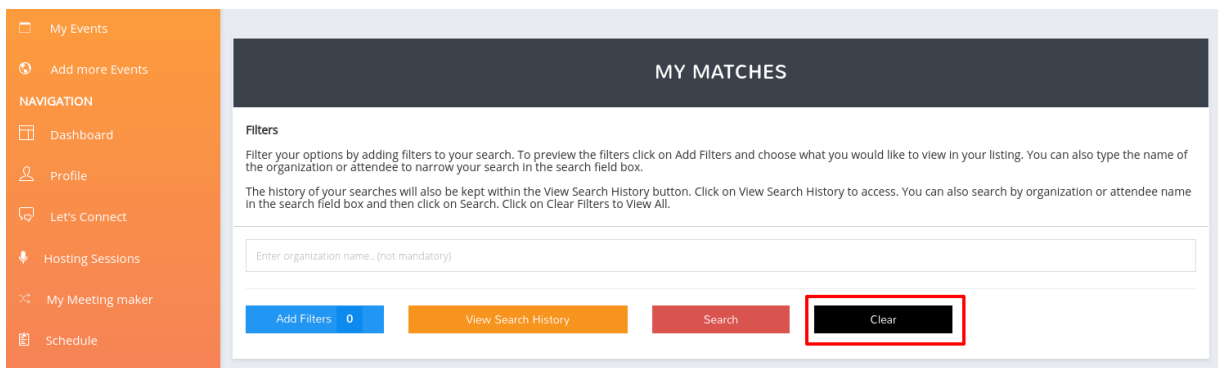
### 4. Add the filters

- #### a) Click the add filters button shown below.



### 5. IMPORTANT

- #### a) Text from the search box is included in the filter. Leave it blank if you are not searching for a particular person or organization.
- #### b) To initiate a new search you must clear the filters
- #### c) Clear the filters with the clear button shown below

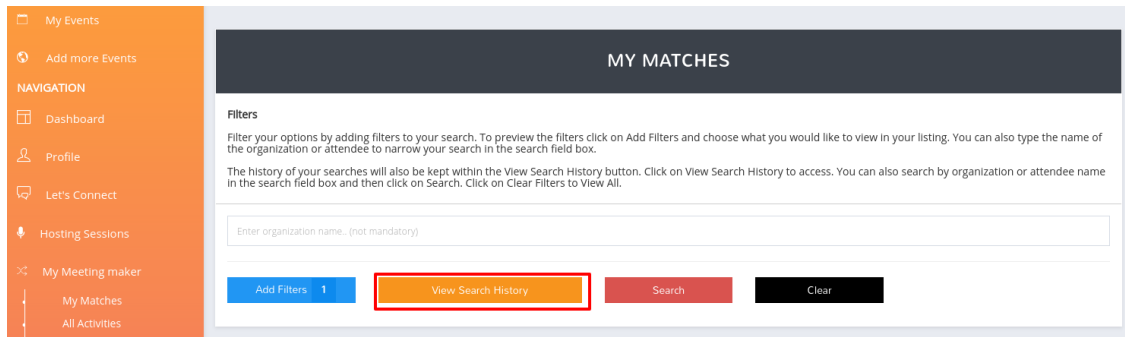


# SEARCH HISTORY

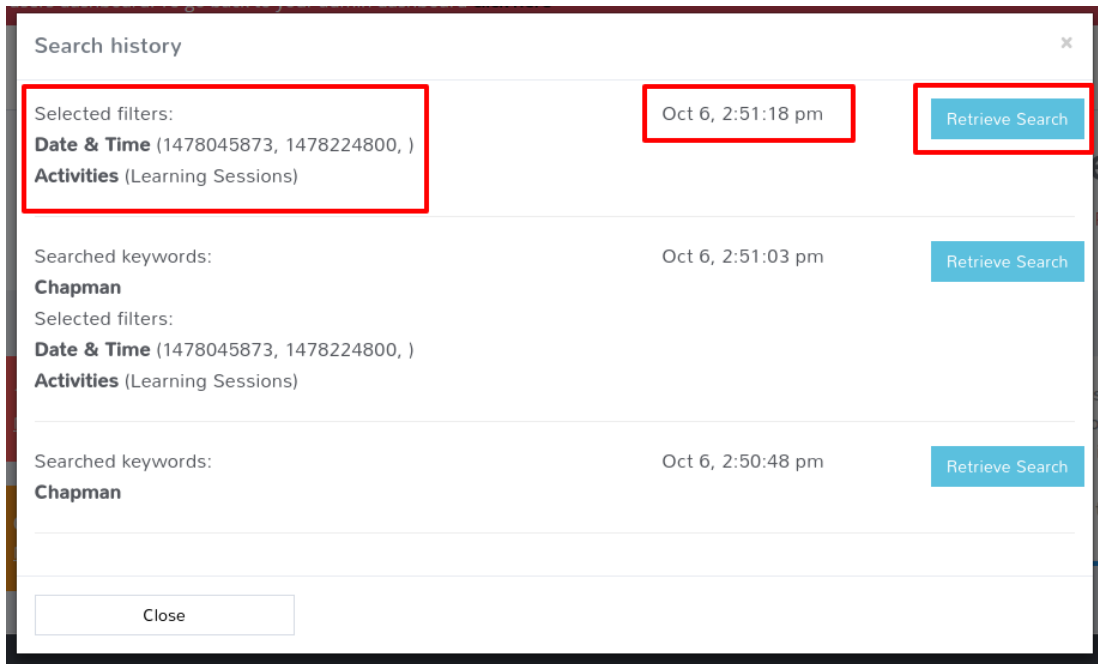
Search History will show you all previous searches you have made, and allow you to retrieve the results from a previous search.

## Features

1. You can access your Search History with the button highlighted below.



2. Once you click on the button you will see this pop-up



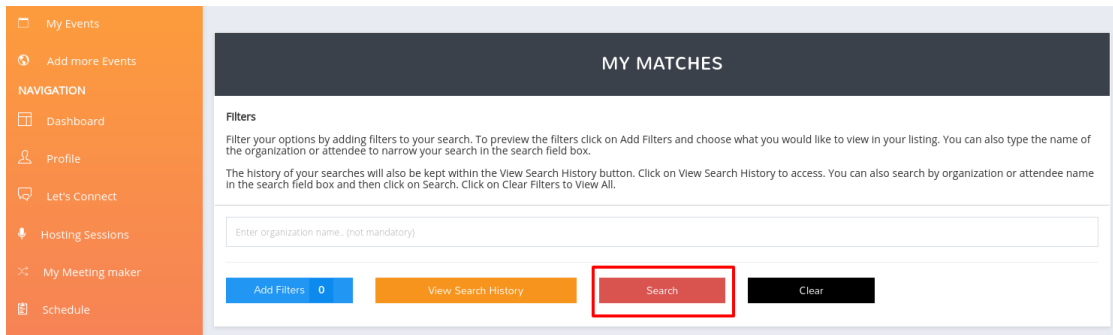
3. The information on the left shows details of the previous search filters. The Date and Time are given in the middle.
4. You can use the Retrieve Search button to retrieve the results of that particular search.

# UTILIZING SEARCH

You can utilize the Search bar to search based on Organization or Participant name.

## Features

1. Use the text field above the buttons to enter the name of the person or organization you are searching for.
2. Then click the Search button shown below



3. You can use the clear button to clear any current searches.
  - a) NOTE: It will also clear any current filters.
  - b) Clear button show below:

