

# Add Report Filters



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**Filters** are used to control the information shown when running a report.


- Adding an **ID** field as a filter allows you to check a box and select which of the specified records you would like to include in your report. For example, adding the Provider ID field allows you to select which providers to include in your report.
- Adding a **Text** field as a filter will allow for the result set to be constrained only to those results where the value in the corresponding field matches the text specified in the filter window. Text filters can be applied as exact, partial searches, or between (range between 2 letters).
- Adding a **Numeric** field as a filter will allow for the result set to be constrained only to those results where the value in the corresponding field matches the numeric value specified in the filter window. Numeric filters can be applied using the comparators: equal to, does not equal, greater than, greater than or equal to, less than, less than or equal to or between.
- Adding a **Monetary** field as a filter will allow for the result set to be constrained only to those results where the value in the corresponding field matches the dollar value specified in the filter. Monetary filters can be applied using the comparators: equal to, does not equal, greater than, greater than or equal to, less than, less than or equal to or between.

Follow the steps below to add filters to a report.

1. Select **Reports > Builder**.
2. Use the **Show All** button to view all custom reports. Or use the **Search Bar** to further drill down your search.
3. Select the **Reports** from the list.
4. In the **Report Fields** pane
  1. Expand the **Report Field** category you wish to filter the report off of.
  2. Or use the **Field Search** to search for fields in all categories.

 You can search and filter by a specific field type (Date, ID, Money, Number, Text) by Clicking  and limiting the search to specific report field types.

5. Drag and drop the field into the **Filters** pane.

 The order in which you drop the filters on the pane will not be the order shown for the filters. The last filter dropped will always be highlighted so you can see where it will fall in the filter

order.

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