How to Filter Reports

After choosing the **Report Type** you want to generate, you can apply **Filters** to modify the records that appear in your Report.

- From the **Filter** dropdown list, choose the field you want to use to filter your report.
  
  *Note: the Filters available here are based on the Report Type you have chosen.*

- Select a **Parameter** and enter a **Value** that match your requirements.

So you know: these three settings work in tandem! The **Filter**, **Parameter**, and **Value** settings you select form a request for information: The Filter list gives you the fields in your Flipcause database you can choose from and the Value field looks for an exact match, based on what you enter, within that field in your Flipcause records. The Parameter dropdown lets you decide how to sort the records that match your Value: whether they are included in or excluded from your report, whether you want to filter with a specific date or a range of dates, and so on.

- For each Filter and Parameter, you can use the **Add Another Value** button to add multiple values. Your report will contain records that match either the initial value or any of the subsequent values (Value 1 OR Value 2, and so on).

- Add additional Filters as needed by clicking the **Add Filter** button and following the steps above. Each filter you apply will narrow your results to include only those records that match all of your requirements (Filter 1 AND Filter 2, and so on).

- Once you have selected your criteria, click **Generate Report**.
Your results will appear below in a graph, and you will be presented with a list of individual transactions. From here, you can:

- Use the **Custom Report** button to select the fields to display or apply an **Export Profile**
- Use the **Print** button to print a copy of the report, and/or
- Use the **View Full Report** button to open the report in a new window, email the report to yourself as a .csv, or both.