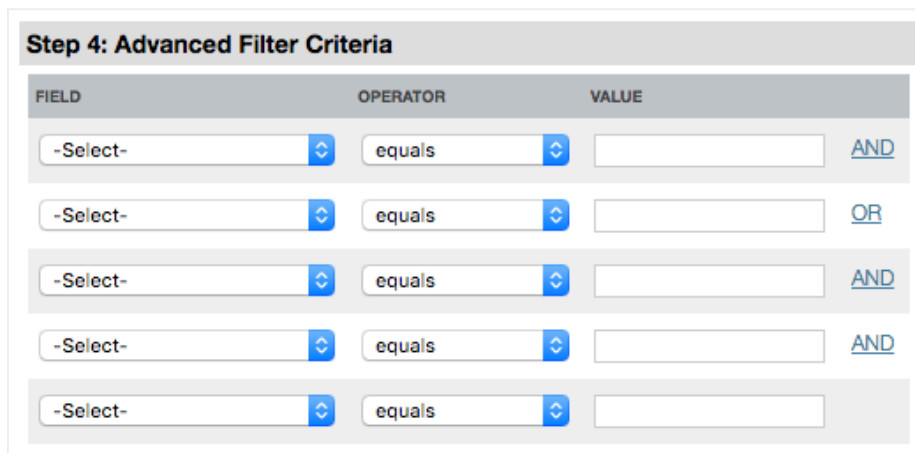# Advanced Filter Criteria For Views

The term "Views" in PlayMaker describes the data that is being shown when a user clicks on the Accounts, Contacts or Referrals tab. Views can be modified using different filters to refine the records shown on any given view.

This article discusses in more detail the 4th Step in creating or editing a view - *Advanced Filter Criteria*, which is a powerful set of five filters that can be used to refine the records shown in your customized view.

The Advanced Filter Criteria section of the Edit View screen shows 4 columns:

- **Field** - A *Field* is a detail from a record, such as Referral Status, Patient Name, Address, Zip Code, etc. Up to five fields can be selected to search through, and the record type (account, contact or referral) determines what data is available in the drop-down menu. As an example, when creating a view for accounts, fields listed in the Account Details screen of any account will populate these drop-down menus.

- **Operator** - An *Operator* is a function that associates the *Field* to the *Value*. Once a Field has been selected, the *Operator* drop-down will need to be changed to reflect the criteria the user is looking for. This function works as statements such as: equals, not equal to, contains, is greater than, etc.

- **Value** - The value is the variable that the user can enter to determine the search, such as a specific zip code, referral status, or account name.

- The last column toggles the *AND* to *OR* when clicked, allowing a user to require multiple filters are met, or at least one filter is met.

Using AND/OR filter conjunctions correctly

Combining *AND* and *OR* with filters can lead to views with undesired results. In the example below, a user would like to filter for all admits at either the San Jose branch or the Palo Alto branch. This search will not actually provide the desired results. Instead, it will provide results for the admits in San Jose, and referrals of all statuses for Palo Alto.

The actual results will be determined this way:

(Referral Status = Admit; **AND** Branch = San Jose) **OR** (Branch = Palo Alto)

The *AND* conjunction requires the first two criteria to both be met, while the *OR*conjunction removes any of the other filter criteria. The correct way to have set up these filters would be to use the SOC Date as the date filter in *Step 3,* since all Admits must have a SOC date. An example of the correct filtering is below:

PlayMaker groups similar conjunctions, putting the *AND* filters together, and the *OR*filters together, which can change what results are shown. It is recommended that advanced filters are limited to either *AND* or *OR* for each view, as this will likely provide the most consistent results.

For additional support with creating views, contact support by emailing support@playmakercrm.zendesk.com, or by using the LiveChat feature at the top right side of this page.

> *Note:* Most views are saved to the user's account, and aren't visible to all users. When seeking assistance with views from PlayMaker Support, users should grant login access so that the view in question can be seen by the PlayMaker CRM support staff.