

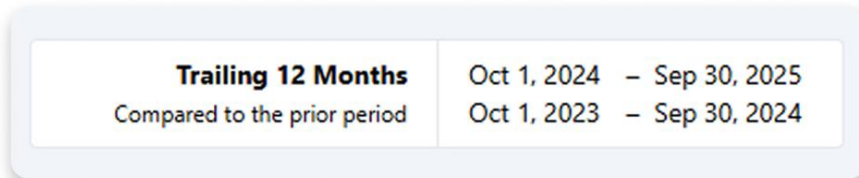
How to Use the Filter Box

Introduction

The Filter Box is a key feature in MortarStone that controls what data appears in your reports and dashboards. It allows you to quickly refine what you see by adjusting filters such as date ranges, locations, funds, or tags. Use the Filter Box to tailor your view and ensure your charts, graphs, and insights reflect the exact data you want to analyze.

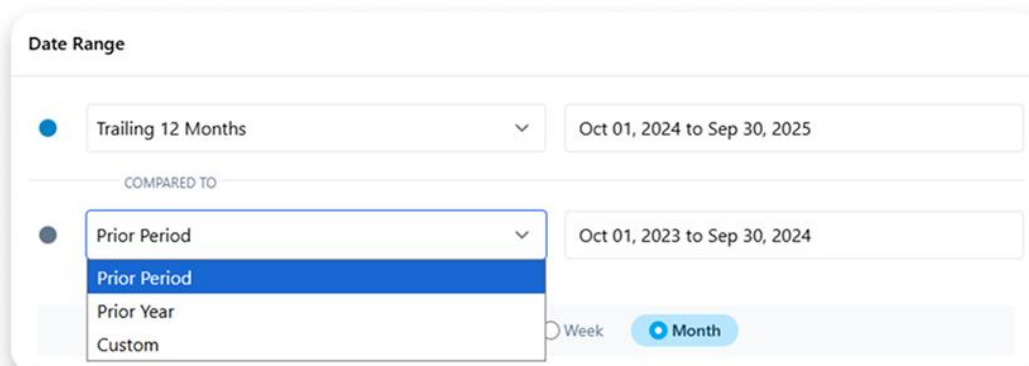
Step-by-Step Instructions

1. Locate the Filter Box



- The Filter Box appears in the **upper-right corner** of your screen.
- Its contents are the same on every page where it's available.

2. To Adjust the Date Range



1. Click inside the **Date Range** fields.
2. Select the desired time range and comparison period, or choose **Custom** to set your own.

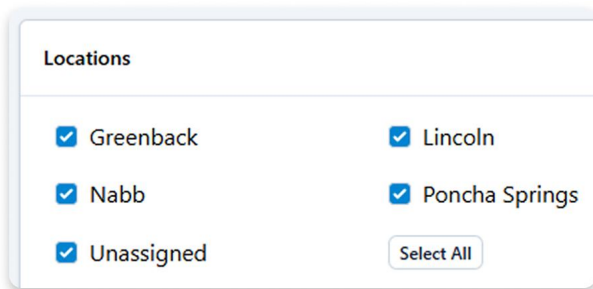
Default view: Trailing 12 months vs. Prior period

3. Click the **Change Settings** button to save.

A blue rectangular button with rounded corners and a white border, containing the text "Change settings" in white.

3. To Select Locations

1. If your church has multiple campuses, you can filter by **Location**.

A white rectangular panel with a light blue border and rounded corners. At the top, the word "Locations" is written in a small, bold, dark blue font. Below this, there are two columns of checkboxes. The first column contains three items: "Greenback", "Nabb", and "Unassigned", each with a blue checkmark to its left. The second column contains two items: "Lincoln" and "Poncha Springs", each with a blue checkmark to its left. At the bottom right of the panel, there is a small, rounded rectangular button with the text "Select All" in a light blue font.

2. All locations are selected by default. You can review or manage locations under **Settings** → **Locations**
3. Click the **Change Settings** button to save.

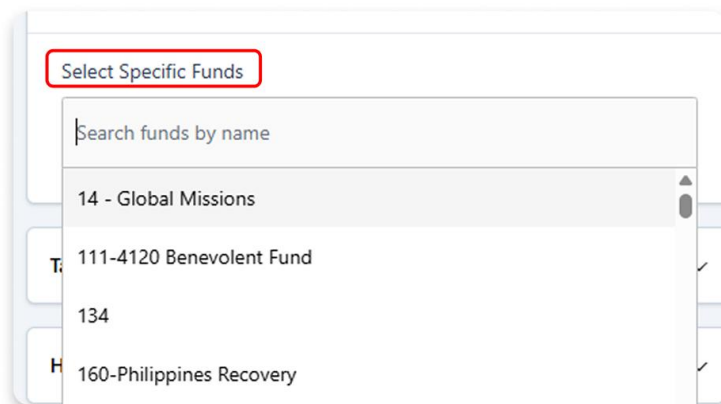
4. To Choose Fund Categories

1. Under **Funds**, the **General** fund category is preselected by default.
 - This is because it's marked as part of the **Default Fund Group** in your **Fund Categories**.

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- A white rectangular panel with a light blue border and rounded corners. It contains a list of five fund categories, each preceded by a checkbox. The categories are: "Building", "Camp", "Children's Ministry", "General", and "Outreach/Missions". The "General" category has a blue checkmark in its checkbox, while the others have empty white checkboxes.

2. To change this view:

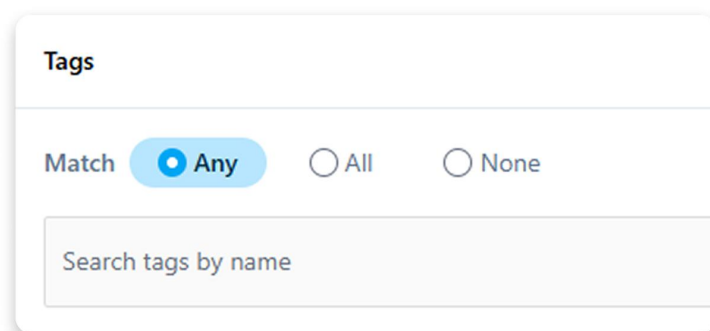
- **Select a different fund category** (e.g., *Outreach, Missions*), or
- Uncheck all categories and manually select specific funds in the **Select Specific Funds** field.



The screenshot shows a dropdown menu titled "Select Specific Funds" which is highlighted with a red rectangle. Below the title is a search bar labeled "Search funds by name". A list of fund categories is displayed, including "14 - Global Missions", "111-4120 Benevolent Fund", "134", and "160-Philippines Recovery". Each item has a small checkmark icon to its right, indicating it is selected.

3. Click the **Change Settings** button to save.

5. To Filter by Tags (If tags exist)



The screenshot shows a "Tags" filter section. It includes a "Match" label followed by three radio buttons: "Any" (which is selected), "All", and "None". Below these options is a search bar labeled "Search tags by name".

Tags allow you to refine reports by specific household attributes.

1. Scroll to the bottom of the Filter Box and click the **Tags** field.
2. Choose one or more tags (e.g., *Volunteers, New Members*).
3. Click the **Change Settings** button to save.

👉 **Note:** Changes you make in the Filter Box affect **only your view** and do not impact other users.

👉 Troubleshooting Report Display Issues

If the data in your reports don't look right, check the Filter Box first.

Common causes include:

- Incorrect date range
- Missing or unselected locations
- Wrong fund categories
- Active tags filtering out data

Tip: Resetting your filters often resolves 98% of display issues in the reports.

Need Help?

If you have questions or need assistance, contact support@mortarstone.com.