

# Solution Note - Custom Fields Filter

## Filtering reports with Custom Fields

### Problem Statement

When using a digital tool to add valuable information to multiple tickets on a construction plan, you want to be able to view those tickets in a clear, visually desirable report that can be printed or emailed. Documenting information is important to understand trends and areas of success or improvement, but when it comes time to report on the plan's status, it may be tedious to refer back to tickets if there is no efficient way to select which tickets will appear in a report.

### Solution

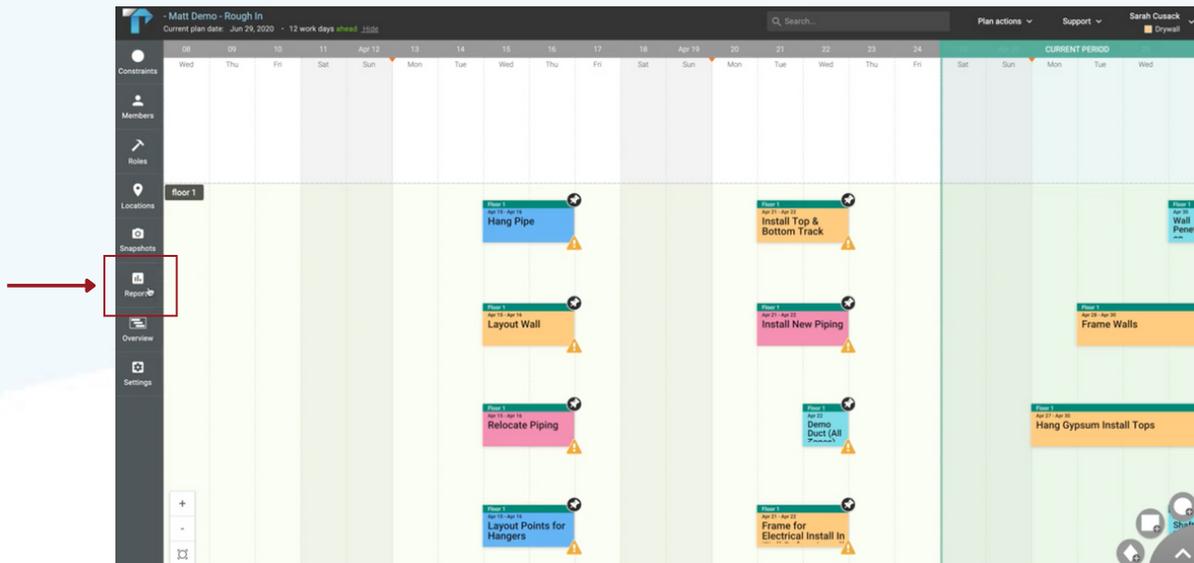
The Custom Fields Filter allows users to generate reports and filter the tickets by their custom field. Users can now create specific reports to target areas and priorities they care about, such as filtering tickets assigned to individual users, tracking material in one place, or tracking hours or PPC.

### Related Materials

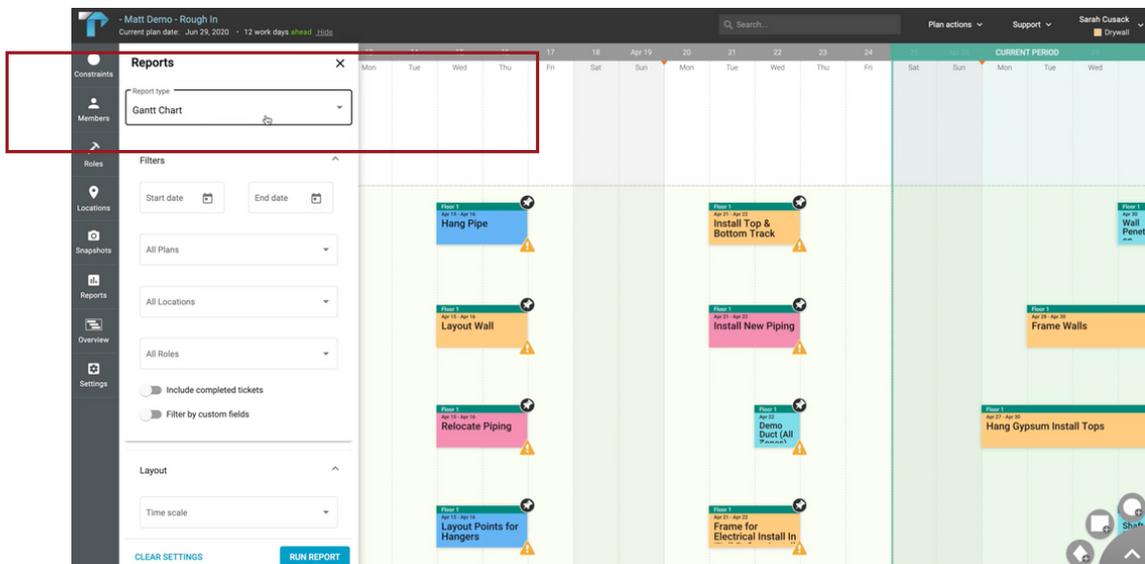
Object	Link	Description
Video	<a href="#">Intro Video</a>	Introduction to Custom Fields
Video	<a href="#">Custom Fields Filter Video</a>	Filter Reports Using Custom Fields
Video	<a href="#">Facilitating Material Deliveries</a>	Using Custom Fields to Facilitate Material Deliveries
FAQ	<a href="#">Custom Fields Video</a>	How to Use Custom Fields

## Step-by-step instructions

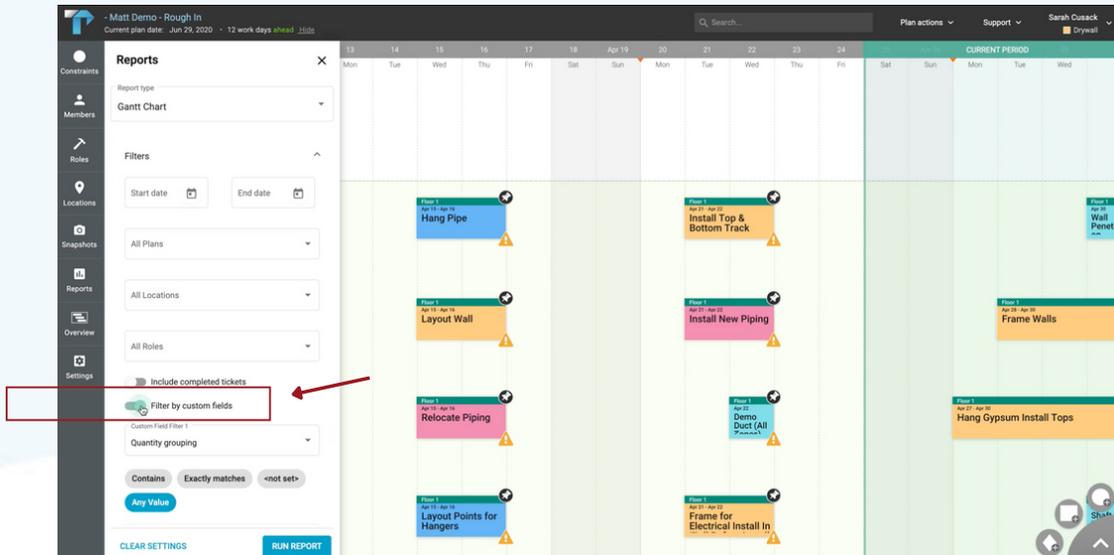
1. Click on Reports on the left-hand side of the plan view.



2. Select the type of report to generate from the Report Type list.



### 3. Toggle on “Filter by custom fields”



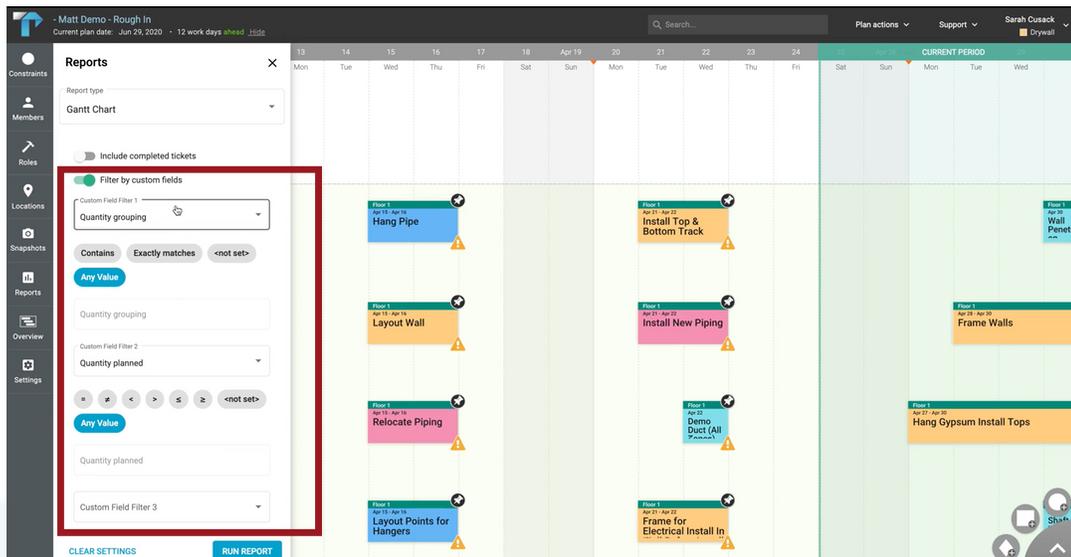
4. Select the custom field to filter by

5. Select one of the comparison operators

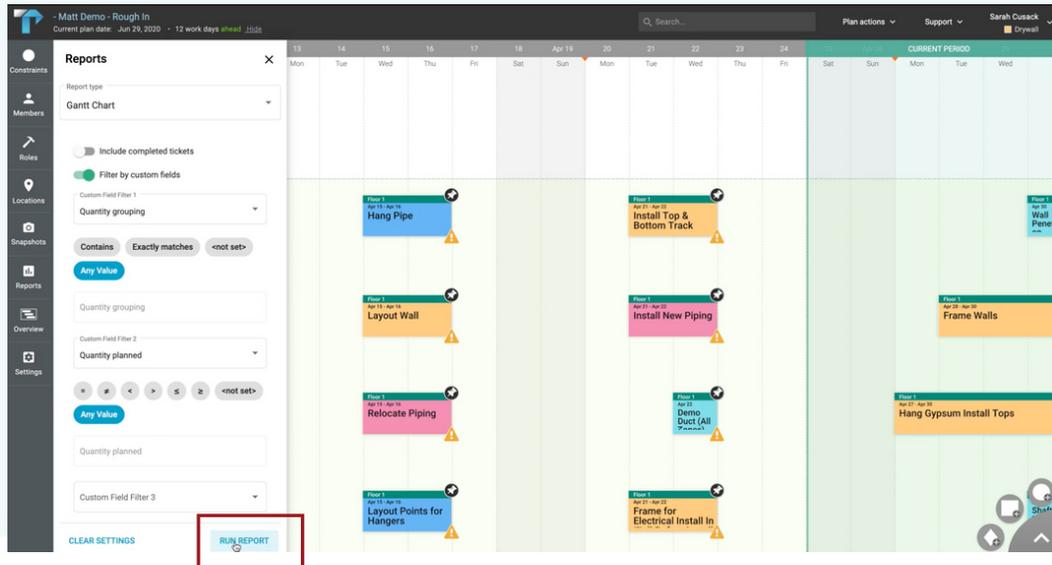
6. Enter a value to compare against using the comparison operator.

7. You can use the same custom field to specify multiple filter criteria. For example, to filter a numeric custom field within a range use two custom field filters with the > and < operators.

**Note: Filtering on the same custom field multiple times will filter to only tickets that match all filter criteria**



## 5. Click "Run Report"



**NOTE: Filter instructions by custom field type**

### Numeric

Select a numeric comparator and enter a value for the comparison

### List

Select the option comparator and the options for the comparison

### Text/Link

Select the text comparator and enter the text for the comparison

### Help is available

For help with Custom Fields Filter, visit the FAQ here:

[Use Custom Fields Filter](#) | [Touchplan.io Help Center](#)

For live help, click on the "Support" drop down in the top right corner of your planning screen and click the "Live Chat" button. This will connect you to a CS representative who will be able to answer any questions that you may have.

Issues, concerns, defects in this note?

We welcome any feedback you may have on this note to help us continually improve our materials and provide the best support that we can to our customers.

Please send any comments, suggestions, or reports of errors to the CS Live Chat