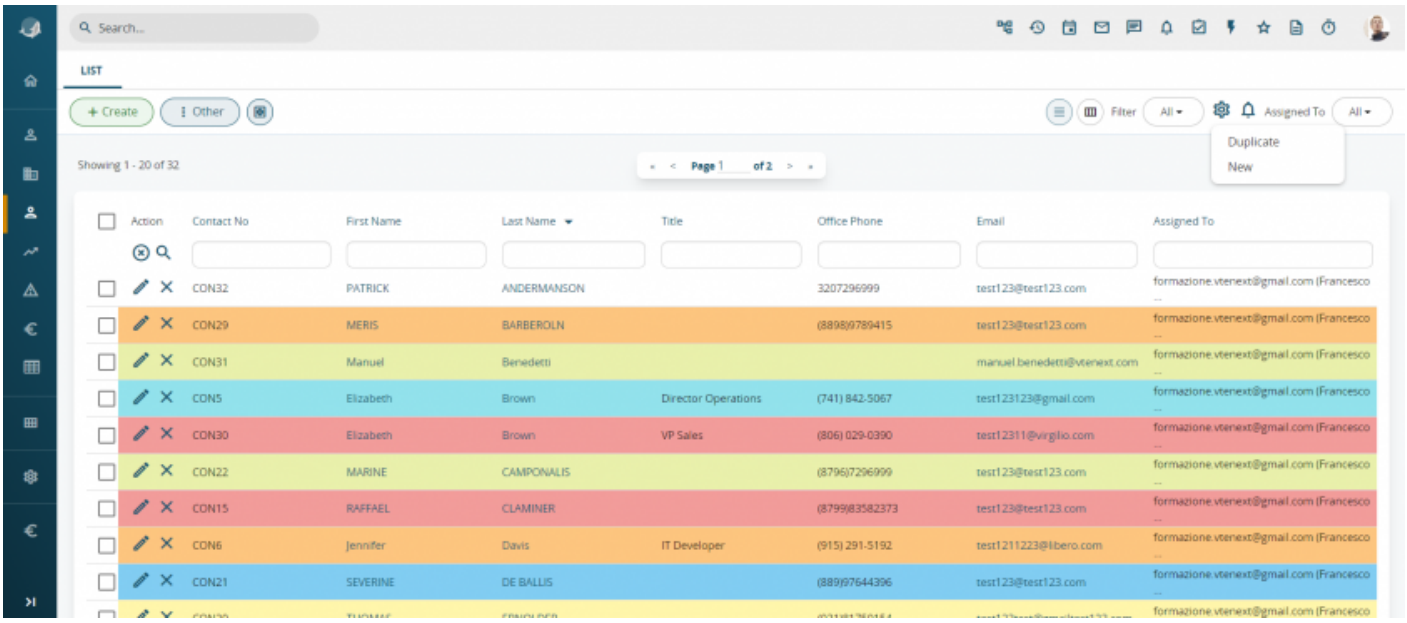
2.6.1 How to create a Filter

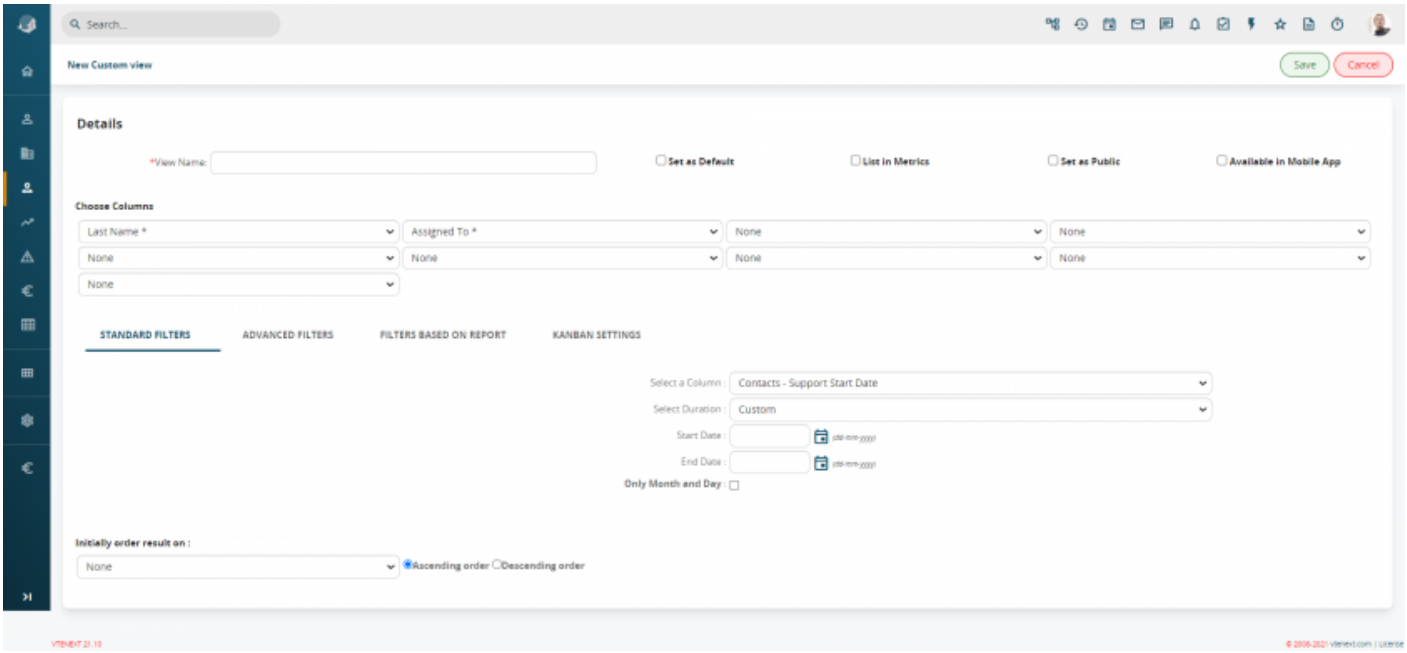
The following section explains how to create a customised filter starting from a list of accounts. This procedure can be applied to all the other modules.

Configuration parameters:

- columns content (filter fields displayed)
- any time interval in which the data were created or changed
- search operators including “and”, “or”, “contains”, “does not contain” etc.

To create a new filter, click on **NEW** from the cogwheel icon alongside the Filter.

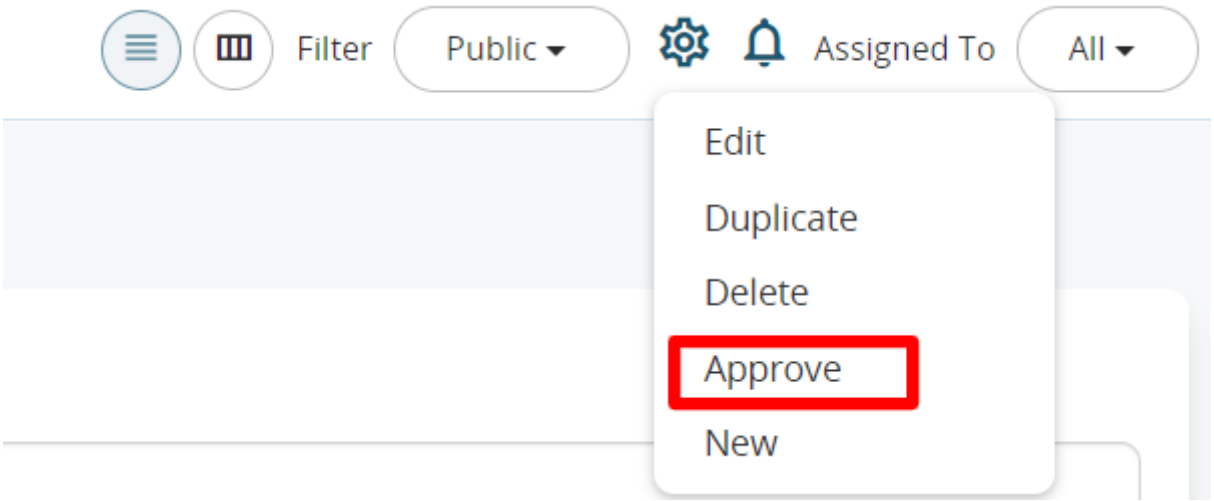




From this screen you can create your customised list.

Set as Default	If you want to apply the filter automatically every time you open the module
List in Metrics	The results number of the filter will appear in the dashboard “Key Index” in the Homepage”
Set as public	Option to make the filter public. It must be previously agreed by an admin user in order to be displayed and used by all the other users. Note: remember that the filters, even if they are not public, are visible according the users roles (ex: the sales manager can see all the filters created by area manager/sellers
Available in Mobile APP	Filter available in Mobile APP

N.B. The public filter must be approved in advance by an user with the right of Administrator so that it can be visualized and be used by all users.



Standard Filters

Select Column	Select a Date type field to make a time selection.
Select duration	It allows to set a customized or pre-estabilished time frame related to the field you've chosen in "Select"
Starting/ Ending date	They are automatically set through the option "Select duration", except for the personalized option
Order initially for	It allows organize the data in ascending or discending order.



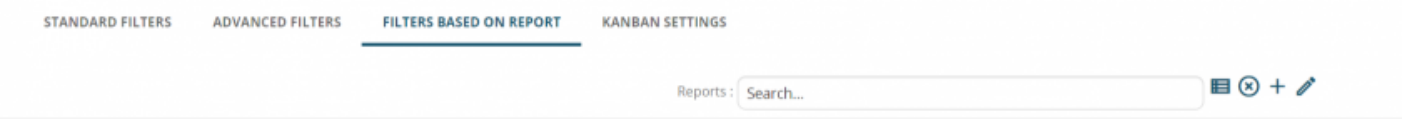
In the Advanced Filters section you can define certain selection criteria that are not based on the timeline (all other fields: drop-down menu, free text, number, etc.).40

Caution: The "equals" and "contains" operators differ as follows:
Equals: performs a character by character check. The field value must be exactly the same as the term of comparison contained in the filter, including upper case and lower case letters.
Contains: this is a less restrictive check than "equals", where the field value must contain the text string specified in the term of comparison.

Example:

Accounts		Filter	
Account name	**Province**	**Province equals to VE**	**Province contains VE**
Rossi SPA	**VE**	Included in the filter	Included in the filter
Verdi SRL	**Verona**	Not included in the filter	Included in the filter
Gialli SAS	**Ve**	Included in the filter	Included in the filter

In the Filters Based on Reports section you can extend the filter functions by means of a Report (for use of the Report module refer to section 12.1):



By means of this setting you can link to the filter the conditions set and columns selected previously in the Report.

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