

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.

The screenshot displays a CRM interface with a list of contacts. A filter configuration overlay is visible, showing a table of columns and a search bar. The table has columns for Action, Contact No, First Name, Last Name, Title, Office Phone, Email, and Assigned To. The search bar is labeled 'Search...'. The overlay also shows a 'Filter' button and a 'New' button. The main list shows 10 contacts, with the first one being Patrick Anderson. The interface includes a sidebar with navigation icons and a top bar with a search bar and various icons.

Action	Contact No	First Name	Last Name	Title	Office Phone	Email	Assigned To
<input type="checkbox"/>	CON32	PATRICK	ANDERMANSON		3207296999	test123@test123.com	formazione.vtenext@gmail.com (Francesco)
<input type="checkbox"/>	CON29	MERIS	BARBEROLIN		(8898)9789415	test123@test123.com	formazione.vtenext@gmail.com (Francesco)
<input type="checkbox"/>	CON31	Manuel	Benedetti			manuel.benedetti@vtenext.com	formazione.vtenext@gmail.com (Francesco)
<input type="checkbox"/>	CON5	Elizabeth	Brown	Director Operations	(741) 842-5067	test123123@gmail.com	formazione.vtenext@gmail.com (Francesco)
<input type="checkbox"/>	CON30	Elizabeth	Brown	VP Sales	(806) 029-0390	test12311@virgilio.com	formazione.vtenext@gmail.com (Francesco)
<input type="checkbox"/>	CON22	MARINE	CAMPONALIS		(8796)7296999	test123@test123.com	formazione.vtenext@gmail.com (Francesco)
<input type="checkbox"/>	CON15	RAFFAEL	CLAMINER		(8799)83582373	test123@test123.com	formazione.vtenext@gmail.com (Francesco)
<input type="checkbox"/>	CON6	Jennifer	Davis	IT Developer	(915) 291-5192	test1211223@libero.com	formazione.vtenext@gmail.com (Francesco)
<input type="checkbox"/>	CON21	SEVERINE	DE BALLIS		(889)97644396	test123@test123.com	formazione.vtenext@gmail.com (Francesco)
<input type="checkbox"/>	CON20	FRANCESCO	FRANCESCO		(889)97644396	test123@test123.com	formazione.vtenext@gmail.com (Francesco)

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-established 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.

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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):

Reports: 

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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