

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. At the top, there is a search bar and a toolbar with icons for various actions. Below the toolbar, a 'LIST' section contains buttons for '+ Create', 'Other', and a cogwheel icon. A dropdown menu is open next to the cogwheel icon, showing options for 'Filter' (set to 'All'), 'Assigned To' (set to 'All'), 'Duplicate', and 'New'. The main area shows a table of contacts with columns: Action, Contact No, First Name, Last Name, Title, Office Phone, Email, and Assigned To. The table is paginated, showing 'Page 1 of 2' and 'Showing 1 - 20 of 32'.

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)

Search...

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New Custom view

SaveCancel

Details

*View Name:

☐ Set as Default☐ List in Metrics☐ Set as Public

Choose Columns

Last Name *

Assigned To *

None

None

None

None

None

None

STANDARD FILTERS

ADVANCED FILTERS

FILTERS BASED ON REPORT

KANBAN SETTINGS

Select a Column :Leads - Modified Time

Select Duration :Custom

Start Date :

📅(dd-mm-yyyy)

End Date :

📅(dd-mm-yyyy)

Only Month and Day :☐

Initially order result on :

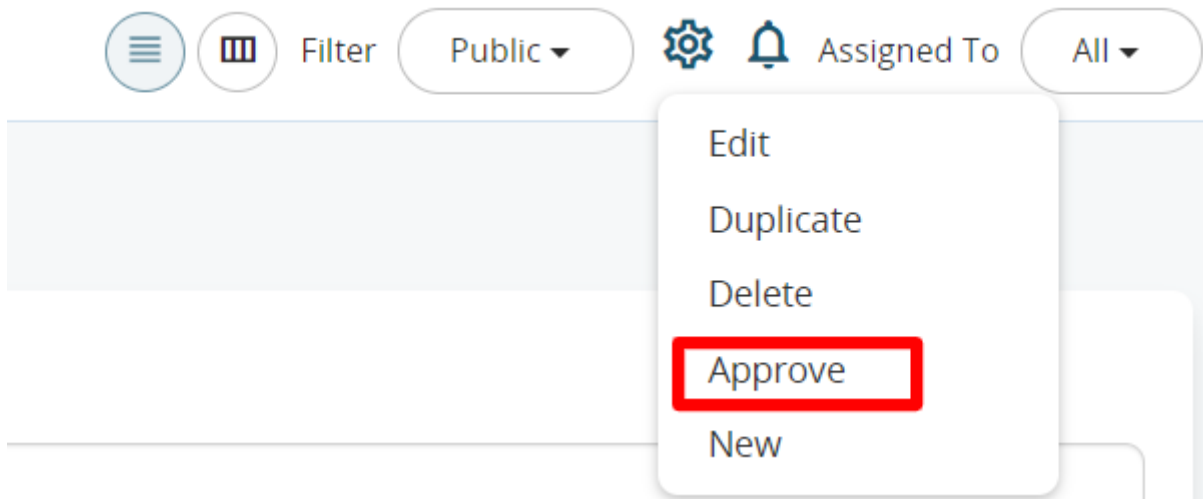
None

☒ Ascending order☐ Descending order

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Set as Default	If you want to apply the filter automatically every time you open the module
List in Metrics	<i>Not in use anymore, will be removed in the next release</i>
Set as public	<p>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.</p> <p>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)</p>

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.

RULE				
None	▼	None	▼	And
None	▼	None	▼	And
None	▼	None	▼	And
None	▼	None	▼	And
None	▼	None	▼	And

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 13.1):

STANDARD FILTERS

ADVANCED FILTERS

FILTERS BASED ON REPORT

KANBAN SETTINGS

Reports :

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