

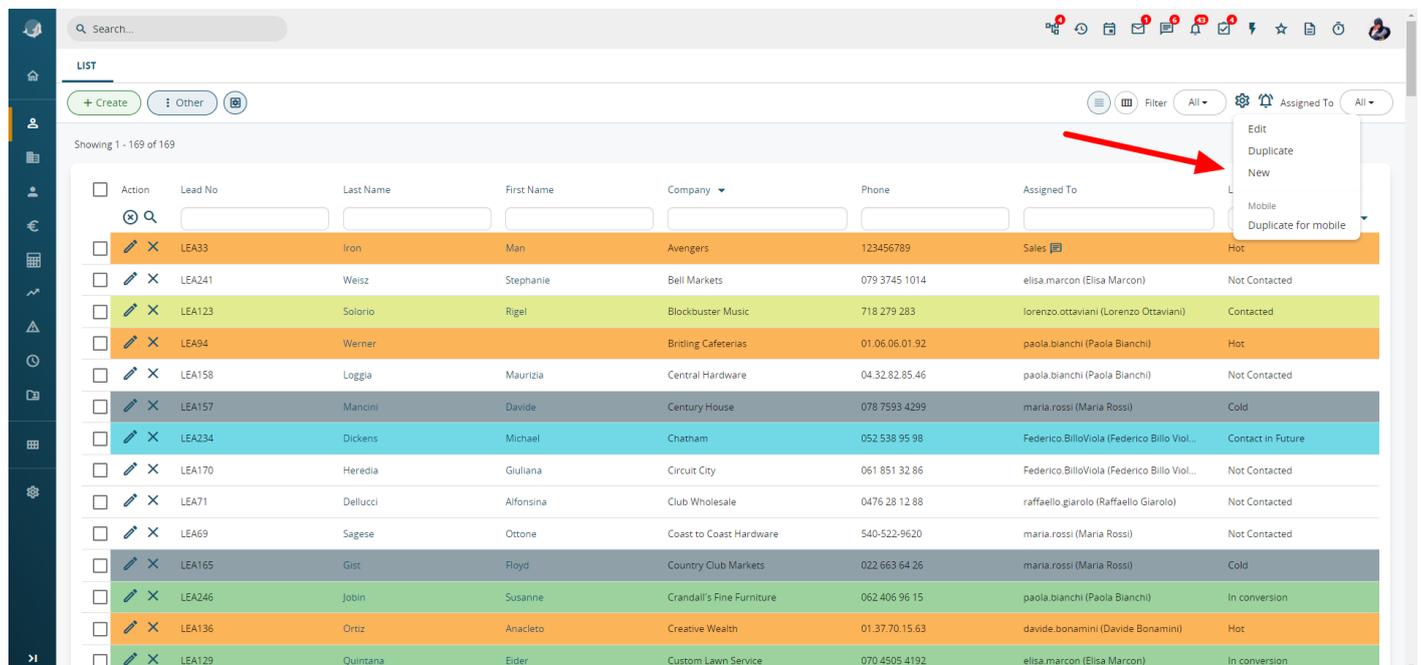
2.6.1 How to create a Filter (standard filters, advanced filters, filters based on report, kanban)

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:

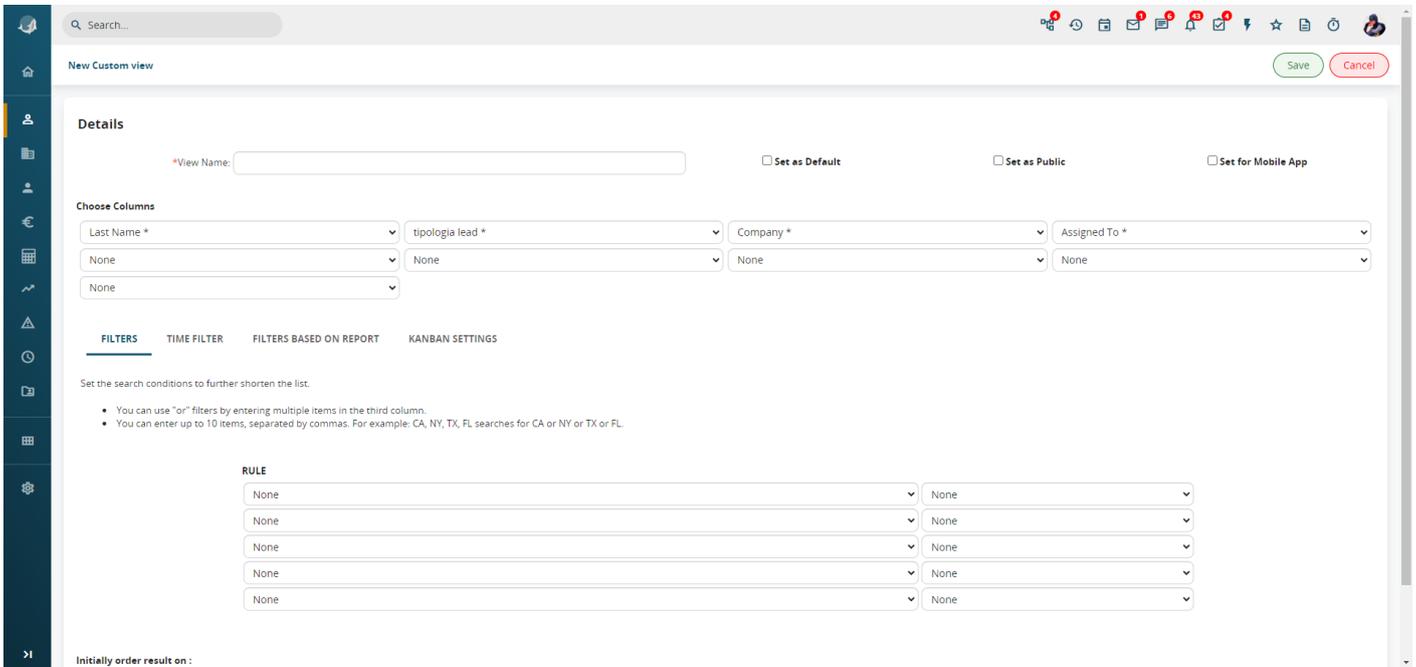
- columns content (filter fields displayed)
- any time interval in which the data were created or changed
- search operators including “and”, “or”, “contains”, “does not contain” etc.

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



The screenshot shows a CRM interface with a list of leads. The interface includes a search bar at the top, a sidebar with navigation icons, and a main content area displaying a table of leads. The table has columns for Action, Lead No, Last Name, First Name, Company, Phone, Assigned To, and a status column. A red arrow points to the 'NEW' option in the filter menu, which is accessed via a cogwheel icon next to the 'Filter' dropdown.

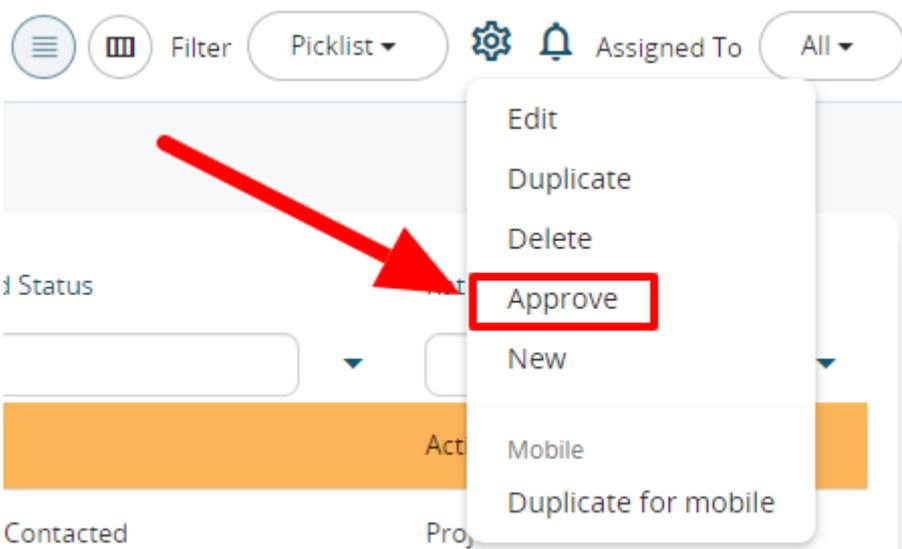
Action	Lead No	Last Name	First Name	Company	Phone	Assigned To	Status
<input type="checkbox"/>	LEA33	Iron	Man	Avengers	123456789	Sales	Hot
<input type="checkbox"/>	LEA241	Weisz	Stephanie	Bell Markets	079 3745 1014	elisa.marcon (Elisa Marcon)	Not Contacted
<input type="checkbox"/>	LEA123	Solorio	Rigel	Blockbuster Music	718 279 283	lorenzo.ottaviani (Lorenzo Ottaviani)	Contacted
<input type="checkbox"/>	LEA94	Werner		Britling Cafeterias	01.06.06.01.92	paola.bianchi (Paola Bianchi)	Hot
<input type="checkbox"/>	LEA158	Loggia	Maurizia	Central Hardware	04.32.82.85.46	paola.bianchi (Paola Bianchi)	Not Contacted
<input type="checkbox"/>	LEA157	Mancini	Davide	Century House	078 7593 4299	maria.rossi (Maria Rossi)	Cold
<input type="checkbox"/>	LEA234	Dickens	Michael	Chatnam	052 538 95 98	Federico.BilloViola (Federico Billo Viol...)	Contact in Future
<input type="checkbox"/>	LEA170	Heredia	Giuliana	Circuit City	061 851 32 86	Federico.BilloViola (Federico Billo Viol...)	Not Contacted
<input type="checkbox"/>	LEA71	Dellucci	Alfonsina	Club Wholesale	0476 28 12 88	raffaello.giarolo (Raffaello Giarolo)	Not Contacted
<input type="checkbox"/>	LEA69	Sagese	Ottone	Coast to Coast Hardware	540-522-9620	maria.rossi (Maria Rossi)	Not Contacted
<input type="checkbox"/>	LEA165	Gist	Floyd	Country Club Markets	022 663 64 26	maria.rossi (Maria Rossi)	Cold
<input type="checkbox"/>	LEA246	Jobin	Susanne	Crandall's Fine Furniture	062 406 96 15	paola.bianchi (Paola Bianchi)	In conversion
<input type="checkbox"/>	LEA136	Ortiz	Anacleto	Creative Wealth	01.37.70.15.63	davide.bonamini (Davide Bonamini)	Hot
<input type="checkbox"/>	LEA129	Quintana	Eider	Custom Lawn Service	070 4505 4192	elisa.marcon (Elisa Marcon)	In conversion



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
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)
Set for Mobile App	Select this option if you want to make that filter available on the Wilson Mobile App as well

N.B. The public filter must be approved in advance by a 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 descending 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.).

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):

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

Finally, in the "**Kanban Configuration**" tab, you can set up a column view that allows sorting by a chosen variable (typically a dropdown menu) and drag and drop a record from one value to another.

For example, if you want to view companies by the "industry" field in Kanban mode, this configuration is required. When creating or editing a filter, click on "Kanban Configuration" and then on the "**Add Column**" button on the right.

The screenshot shows the 'vtenext' application interface. On the left is a dark blue sidebar with navigation items: Home, Leads, Quotes, Accounts, Contacts, Trouble Tickets, Potentials, Vendors, Purchase Order, and Sales Order. The main content area is titled 'Edit Custom View' and has a search bar at the top. Below the search bar are tabs: STANDARD FILTERS, ADVANCED FILTERS, FILTERS BASED ON REPORT, and KANBAN SETTINGS. The 'Details' section includes a 'View Name' dropdown set to 'All', and three checkboxes: 'Set as Default', 'List in Metrics', and 'Set as Public'. The 'Choose Columns' section contains two rows of dropdown menus. The first row has 'Account No', 'Account Name *', 'Website', and 'Phone'. The second row has 'Assigned To *', 'Email', 'None', and 'None'. At the bottom right, there is an 'Add column' button, which is highlighted by a red arrow.

You can then begin the configuration by adding a column for each item you want to group. In this example, the "Industry" field in the "Companies" module has been chosen, and the configuration is as follows:

Label	This is used to give a name to the column header (e.g., "Financial Sector")
Condition	This step determines which records will be displayed in that column based on a condition (e.g., the "Sector" field is EQUAL to "Financial")
Enable drag here	This option enables the "drag here" functionality, allowing records to be moved into that specific Kanban column
Action	This option allows the configuration following the "drag here" action, meaning that when a record is moved into that column, the value of the dropdown field (in our example, the "sector" field) will change from one value (X) to the value selected for the column (in this case, Financial)

Revision #9

Created 2 September 2024 07:58:55 by Admin

Updated 11 November 2024 15:33:06 by Admin