

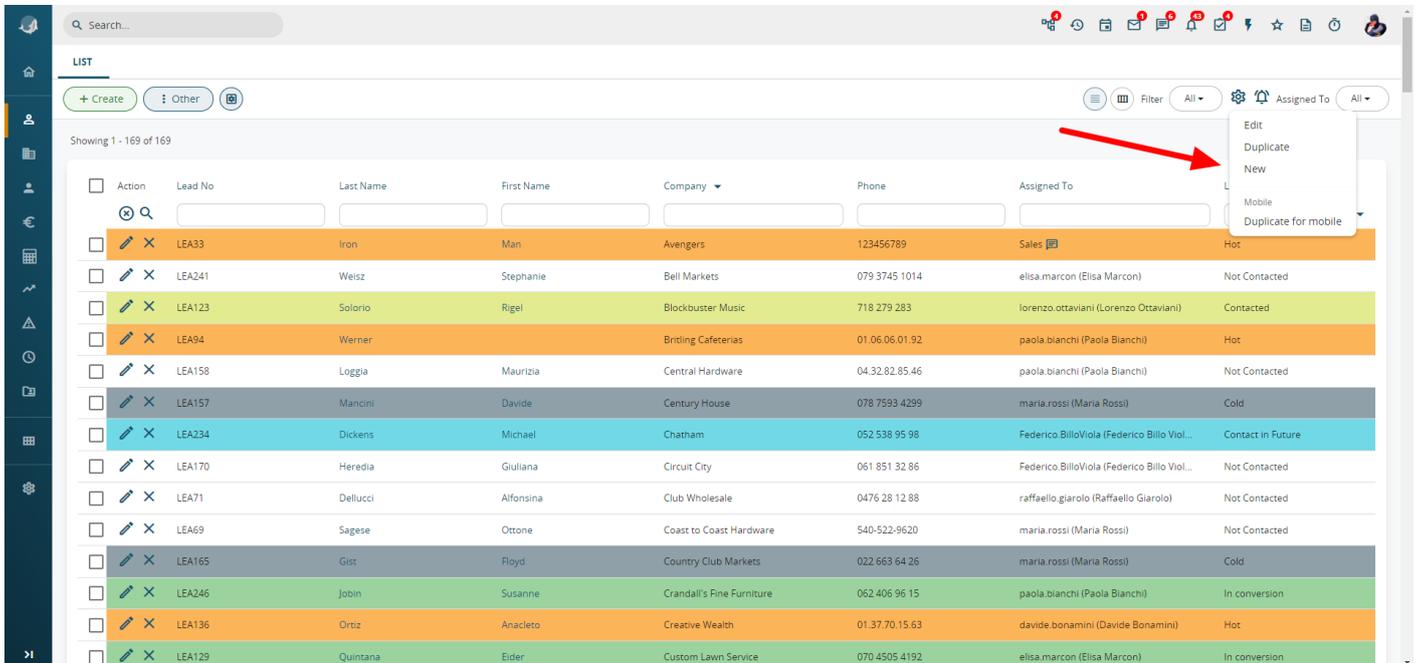
# 2.6.1 How to create a Filter

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:

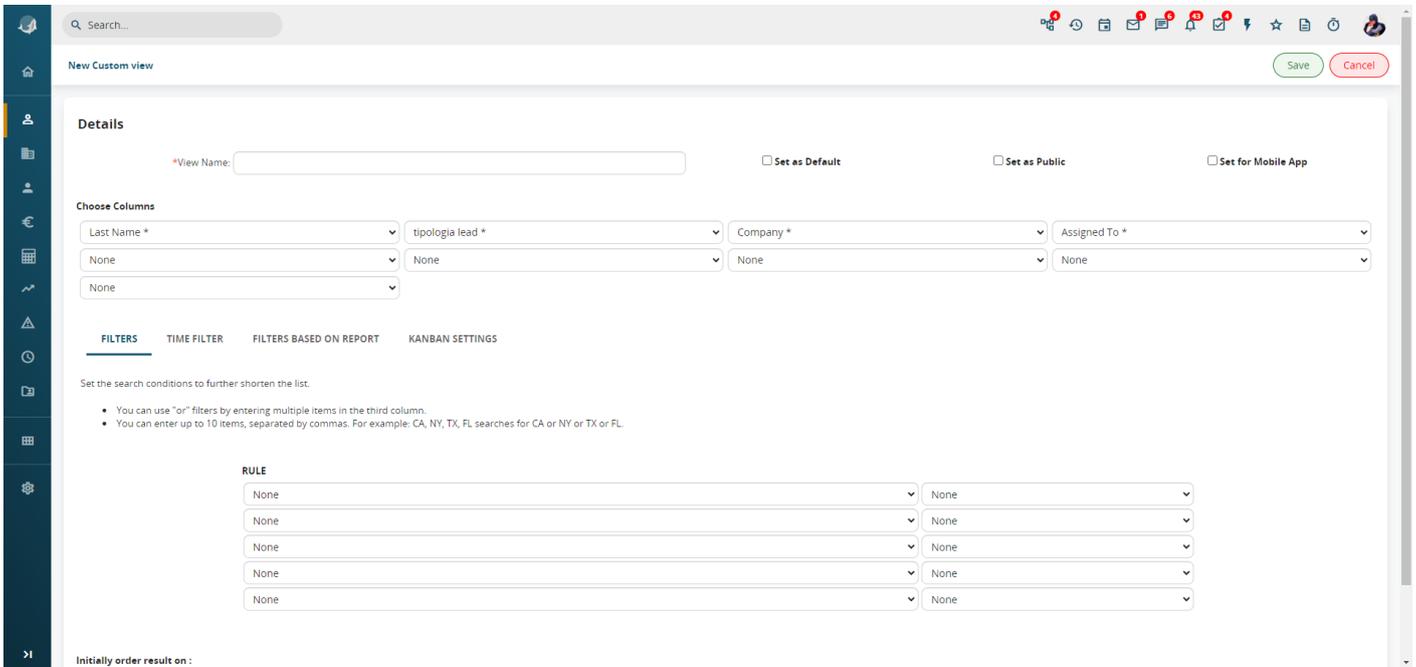
- columns content (filter fields displayed)
- any time interval in which the data were created or changed
- search operators including “and”, “or”, “contains”, “does not contain” etc.

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 accounts. At the top, there is a search bar and a toolbar with icons for 'Filter' and 'Assigned To'. A red arrow points to a cogwheel icon next to the 'Filter' button, which has opened a context menu. The menu options are: Edit, Duplicate, New, Mobile, and Duplicate for mobile. Below the menu, a table of accounts is visible with columns for Action, Lead No, Last Name, First Name, Company, Phone, Assigned To, and a status field.

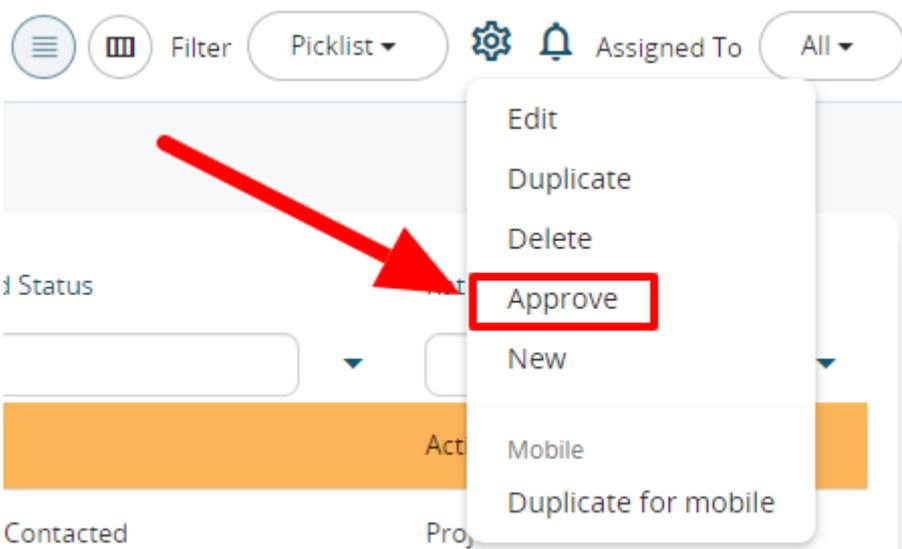
Action	Lead No	Last Name	First Name	Company	Phone	Assigned To	Status
<input type="checkbox"/>	LEA33	Iron	Man	Avengers	123456789	Sales	Hot
<input type="checkbox"/>	LEA241	Weisz	Stephanie	Bell Markets	079 3745 1014	elisa.marcon (Elisa Marcon)	Not Contacted
<input type="checkbox"/>	LEA123	Solorio	Rigel	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	04.32.92.85.46	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	Chatham	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.

<b>Set as Default</b>	If you want to apply the filter automatically every time you open the module
<b>Set as public</b>	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)
<b>Set for Mobile App</b>	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

<b>Select Column</b>	Select a Date type field to make a time selection.
<b>Select duration</b>	It allows to set a customized or pre-established time frame related to the field you've chosen in "Select"
<b>Starting/ Ending date</b>	They are automatically set through the option "Select duration", except for the personalized option
<b>Order initially for</b>	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.).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):

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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