

SuiteCRM Filter Manager

User Guide

SuiteCRM Filter Manager 1

Outright

Configuration Guide:-

1. Go to Administration page and click on outright filter manager

Filter Module	
This section contains Filter Module	
outr_filter_manger	This module carries filter module
Click here	

2. Go to Accounts module and click on to Create a filter for account module

ACC	COUNTS	Click here	Click here to create a filter					
	Name 🗢	City	Billing Country 🖯	Phone \Leftrightarrow	User	Email Address	Date Created $~~\ominus~$	
	BULK ACTION . My Filters	• 🔽 🗉					(1-20 of 51) 🔪 👌	
1	A.D. Importing Company Inc	Santa Monica	USA	(592) 512-5318	max	im.kid@example.co.jp	02/28/2020 07:17 i	
1	A.G. Parr PLC	San Jose	USA	(820) 645-4472	max	beans52@example.us	02/28/202007:17 i	
1	Airline Maintenance Co	Ohio	USA	(712) 589-5062	sally	dev78@example.edu	02/28/2020 07:17 i	
1	AtoZ Co Ltd	Salt Lake City	USA	(309) 534-6115	chris	dev40@example.net	02/28/2020 07:17 i	
1	Avery Software Co	Sunnyvale	USA	(961) 819-7292	sally	phone.phone@example.info	02/28/202007:17 i	
1	B.H. Edwards Inc	San Jose	USA	(372) 511-2478	chris	sales14@example.org	02/28/2020 07:17 i	
1	Chandler Logistics Inc	Santa Fe	USA	(868) 159-3598	will	qa.the.support@example.net	02/28/202007:17 i	
1	Coolview Net Ltd	Santa Monica	USA	(665) 690-5974	sarah	section.the.section@example.de	02/28/2020 07:17 i	
1	Dirt Mining Ltd	Salt Lake City	USA	(457) 359-6922	sally	dev.dev@example.de	02/28/202007:17 i	
	Dirt Mining I to	Cupertino	IISA	(497) 084-9840	carab	support17@example.co.uk	02/28/2020 07:17	

3. Select the All tab and click on Filter (Saved Search) Manager. Then click on to create a Filter (Saved Search) Manager settings.

- a. Users can create a filter manager settings for select saved records and assign it to all active users.
- b. Users can create a filter manager settings for select multiple saved filters, roles and teams.
- c. Saved filter when admin creates filter for each module, the created filter would be displayed on the saved filter list field.
- d. Apply to all active users when admin select the apply to all active users, all users can display the saved filter.
- e. Apply to role when admin select the roles, the users which were assigned to that particular roles can display the filter
- f. Apply to teams when admin select the teams, the users which were assigned to that particular teams can display the filter

CREATE			
SAVE CANCEL			
PASIC			
	-	1. Enter the name of	the filter eettings
Name:*	Test Filter		the fifter settings
Saved Filters:	account_city filter_1 filter_2 filter_3 filter_3	aved Filters	
Direct User:	admin 🔀 🗙	Apply to All Active Users:	6. Select the users
Apply to Role:	Everything Group Marketing Admin Sales Admin	Apply to Teams:	GroupA Team A Team B Team C 4. Select the teams
SAVE CANCEL			
7. Click on	to save		

User Guide:-

1. Login as administrator and create a filter for accounts module.

A	CC(ounts		accounts filter is o	created			
		Name 🔶	City 🖨	Billing Country $ \ominus$	Phone	User	Email Address	Date Created 🕀
0.		My Filters	₅▼₹∎					K < (1-20
	1	360 Vacations accounts	filter_Los Angeles	USA	(123) 263-3581	will	im65@example.co.jp	03/17/2020 09:59
	1	360 Vacations accounts	_filter_San Francisco	USA	(617) 350-6777	max	phone.phone.vegan@example.de	03/17/2020 09:59
	1	A.G. Parr PLC	614 C 1	USA	(671) 226-1165	sarah	sugar.support@example.com	03/17/2020 09:59
	1	Airline Mainten	_hiter_San Jose	USA	(491) 753-6708	sally	section.phone.kid@example.tv	03/17/2020 09:59
	1	Airline Maintenance Co	Persistance	USA	(358) 586-3861	max	im.kid@example.co.uk	03/17/2020 09:59
	1	B.H. Edwards Inc	Los Angeles	USA	(247) 005-3068	max	im27@example.edu	03/17/2020 09:59
	1	Cumberland Trails Inc	Cupertino	USA	(695) 204-6440	sarah	phone.support.the@example.it	03/17/2020 09:59
	1	Dirt Mining Ltd	San Mateo	USA	(972) 296-8082	sarah	beans.qa@example.name	03/17/2020 09:59
	1	First National S/B	Denver	USA	(200) 138-6799	sarah	sales.im.sugar@example.co.uk	03/17/2020 09:59
	1	First National S/B	Ohio	USA	(757) 496-9428	will	hr.kid@example.co.jp	03/17/2020 09:59
	1	Hammer Group Inc	San Francisco	USA	(551) 839-0743	chris	info.phone.sales@example.tw	03/17/2020 09:59

2. Created a filter by city

ACC	COUNTS		Created			
	Name 🗢	City	Billing Crantry $~~\ominus~$	Phone 👌	User 🖨	Email Address
0-	My Filters 🔻	T 🖪 🗉				
	B.H. Edwards Inc	Los Ar City: Los A	Angeles A	(247) 005-3068	max	im27@example.edu
	Ink Conglomerate Inc	Los Angeles	USA	(061) 178-2813	sarah	kid.sales@example.co.jp
	Southern Realty	Los Angeles	USA	(913) 536-8084	chris	kid.kid@example.edu
	T-Squared Techs	Los Angeles	USA	(819) 618-1972	sally	vegan.info.phone@example.name
	Underwater Mining Inc.	Los Angeles	USA	(813) 569-8020	chris	section.beans@example.info
0-	BULK ACTION - My Filters 🔻	T 🖁 🗉				

3. Login as user and go to accounts module , here created filter has displayed on the user's login.

ACC	COUNTS	/	, Created filter has d	isplayed on the us	er's account mo	odule
	Name \Leftrightarrow	City 🔶	Billing Country $~\Leftrightarrow~$	Phone \Leftrightarrow	User	Email Address
	BULK ACTION	My Filters 🔻 🏹 📰				
- /	X-Sell Holdings	accounts_filter_Los Angeles -by admin	USA	(869) 613-8722	Chris Olliver	im44@example.org
	Tortoise Corp	accounts_filter_San Francisco -by admin	USA	(732) 859-8979	Sarah Smith	the.vegan@example.cn
- /	Rubble Group In	c Santa Monica	USA	(316) 656-9059	Sally Bronsen	hr.kid@example.edu
1	Max Holdings Lt	d San Jose	USA	(001) 456-1432	Sally Bronsen	dev.section@example.net
- /	Tri-State Medica	l Corp San Jose	USA	(938) 995-4002	Chris Olliver	the20@example.biz
1	Slender Broadba	ind Inc St. Petersburg	USA	(405) 193-6313	Will Westin	hr57@example.it
- /	Powell Funding	San Mateo	USA	(349) 708-6986	Sarah Smith	qa.support.the@example.it
	Spindle Broadca	st Corp. San Francisco	USA	(132) 448-3489	Will Westin	beans.qa@example.co.uk
	Kaos Trading Ltd	Kansas City	USA	(253) 487-1187	Sarah Smith	kid.phone@example.co.jp