

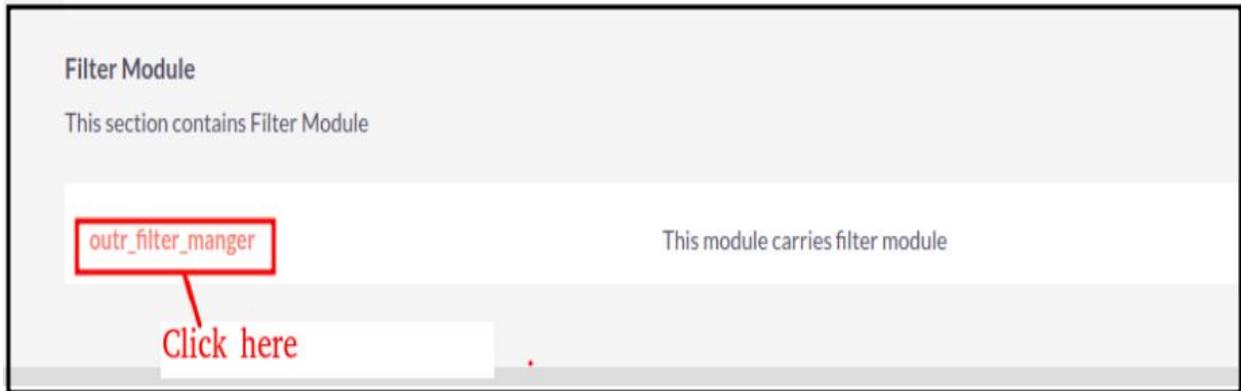


SuiteCRM Filter Manager

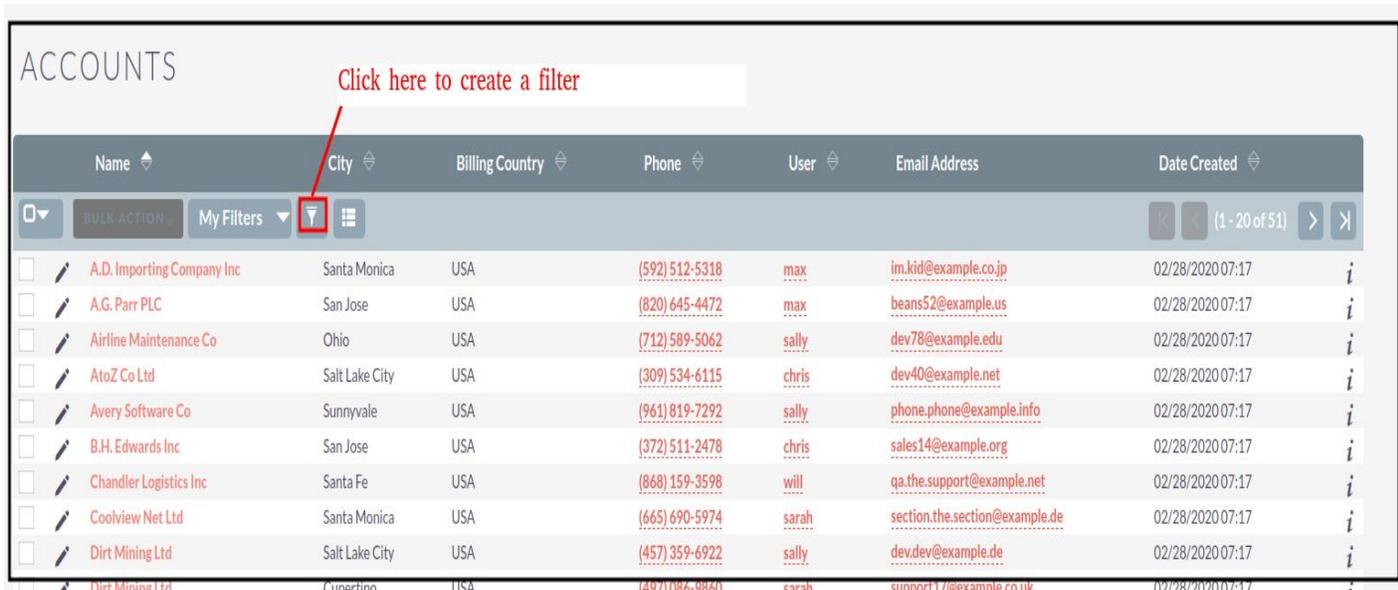
User Guide

Configuration Guide:-

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



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



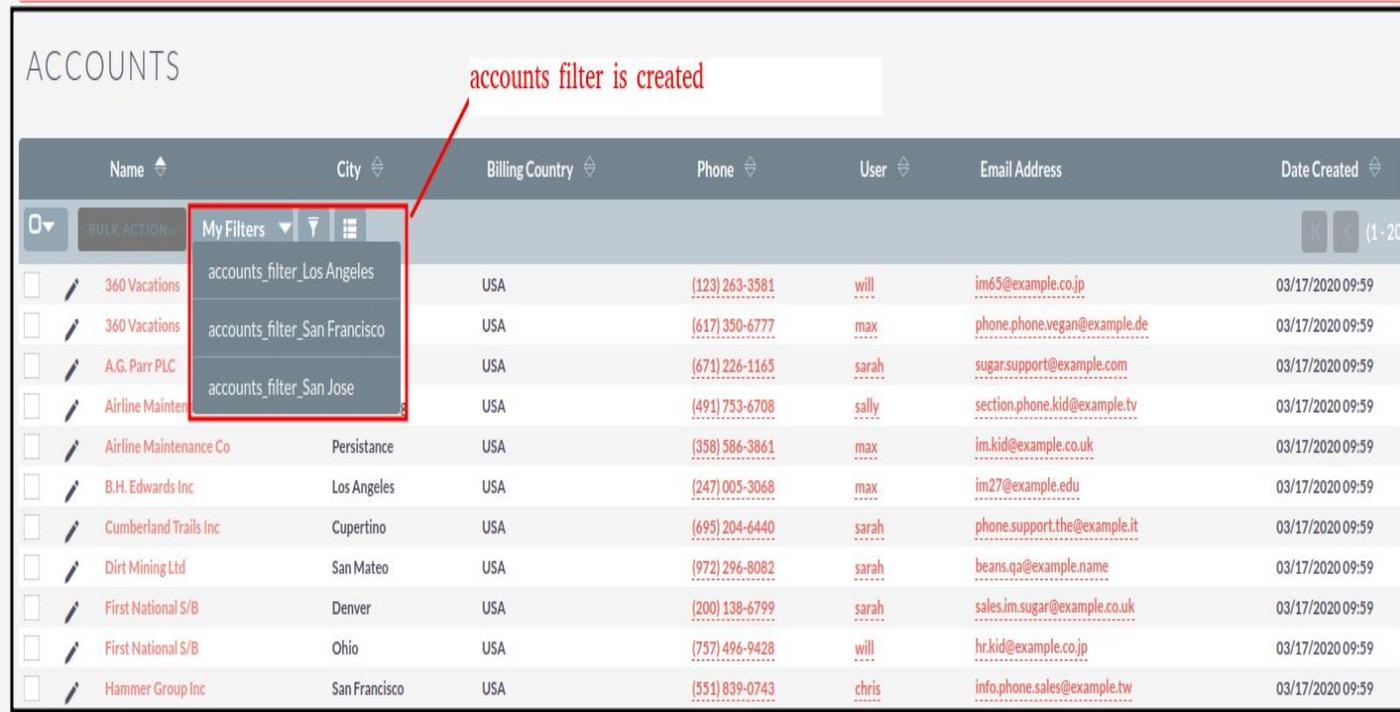
3. Select the All tab and click on Filter (Saved Search) Manager. Then click on to create a Filter (Saved Search) Manager settings.
 - a. Users can create a filter manager settings for select saved records and assign it to all active users.
 - b. Users can create a filter manager settings for select 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

The screenshot shows the 'CREATE' form for a filter manager. The form is titled 'CREATE' and has 'SAVE' and 'CANCEL' buttons at the top. Below the title is a 'BASIC' tab. The form contains several fields and options:

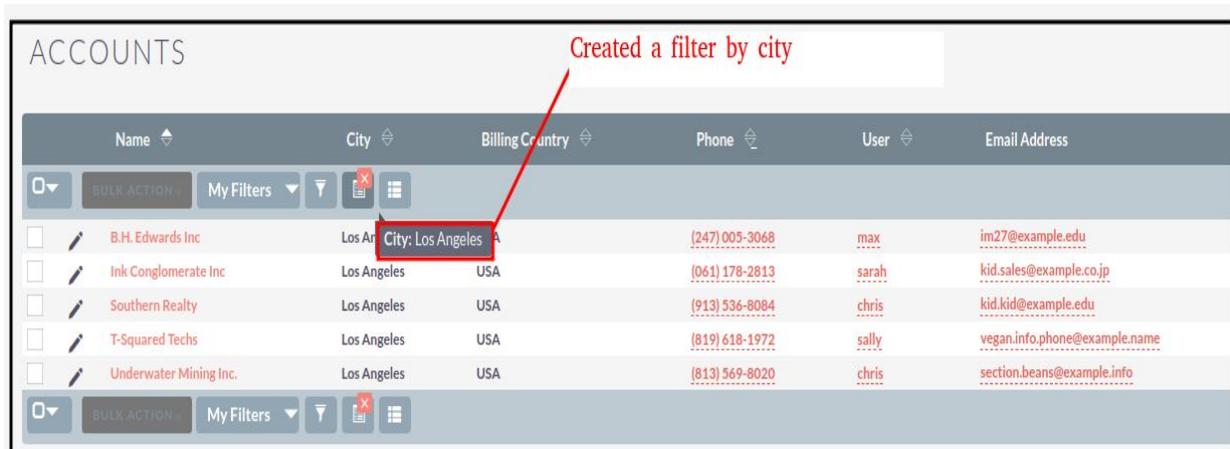
- Name:** A text input field containing 'Test Filter'. A red box highlights this field with the annotation '1. Enter the name of the filter settings'.
- Saved Filters:** A dropdown menu showing a list of filters: 'account_city', 'filter_1', 'filter_2', 'filter_3', and 'filter_3'. A red box highlights this dropdown with the annotation '2. Select the Saved Filters'.
- Direct User:** A text input field containing 'admin'. A red box highlights this field with the annotation '6. Select the users'.
- Apply to Role:** A dropdown menu showing a list of roles: 'Everything', 'Group', 'Marketing Admin', and 'Sales Admin'. A red box highlights this dropdown with the annotation '3. Select the roles'.
- Apply to Teams:** A dropdown menu showing a list of teams: 'GroupA', 'Team A', 'Team B', and 'Team C'. A red box highlights this dropdown with the annotation '4. Select the teams'.
- Apply to All Active Users:** A checkbox that is currently unchecked. A red box highlights this checkbox with the annotation '6. Select the users'.
- Buttons:** 'SAVE' and 'CANCEL' buttons are located at the bottom of the form. A red box highlights the 'SAVE' button with the annotation '7. Click on to save'.

User Guide:-

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



2. Created a filter by city



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

The screenshot shows the 'ACCOUNTS' module interface. A dropdown menu for 'My Filters' is open, showing two filters: 'accounts_filter_Los Angeles -by admin' and 'accounts_filter_San Francisco -by admin'. A red box highlights this dropdown menu, and a red arrow points from a text box above to the 'City' column header. The text box contains the text: 'Created filter has displayed on the user's account module'. Below the dropdown, a table of account records is visible with columns: Name, City, Billing Country, Phone, User, and Email Address.

	Name	City	Billing Country	Phone	User	Email Address
<input type="checkbox"/>	X-Sell Holdings		USA	(869) 613-8722	Chris Olliver	im44@example.org
<input type="checkbox"/>	Tortoise Corp		USA	(732) 859-8979	Sarah Smith	the.vegan@example.cn
<input type="checkbox"/>	Rubble Group Inc	Santa Monica	USA	(316) 656-9059	Sally Bronsen	hr.kid@example.edu
<input type="checkbox"/>	Max Holdings Ltd	San Jose	USA	(001) 456-1432	Sally Bronsen	dev.section@example.net
<input type="checkbox"/>	Tri-State Medical Corp	San Jose	USA	(938) 995-4002	Chris Olliver	the20@example.biz
<input type="checkbox"/>	Slender Broadband Inc	St. Petersburg	USA	(405) 193-6313	Will Westin	hr57@example.it
<input type="checkbox"/>	Powell Funding	San Mateo	USA	(349) 708-6986	Sarah Smith	qa.support.the@example.it
<input type="checkbox"/>	Spindle Broadcast Corp.	San Francisco	USA	(132) 448-3489	Will Westin	beans.qa@example.co.uk
<input type="checkbox"/>	Kaos Trading Ltd	Kansas City	USA	(253) 487-1187	Sarah Smith	kid.phone@example.co.jp