Creating a Filter

Filters allow the user to narrow down records within a module using a specific set of criteria, as well as customize the view or columns displayed in a module.

Note:

1. Default filters can be set when creating a new filter or editing an existing filter by selecting "Set as Default (Personal)".
2. When selecting 'Assigned to' as a filtering criterion, the user must type the value as the Username and <u>not</u> the First or last Name to be filtered upon. The reason for this is that First Name Last Name is not always unique (ex. Each company may have several John Smiths), but the username is always unique.

Creating a Filter [Video]