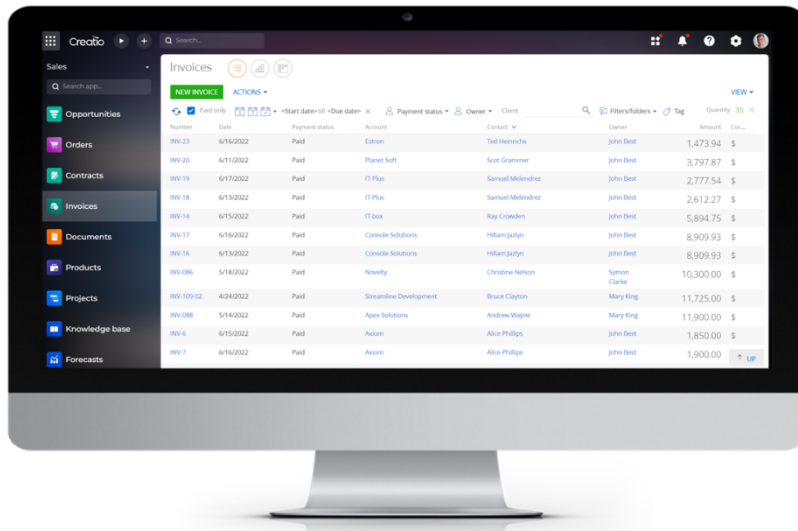




SALES'UP QUICK FILTERS FOR CREATIO



Set up and utilization guide

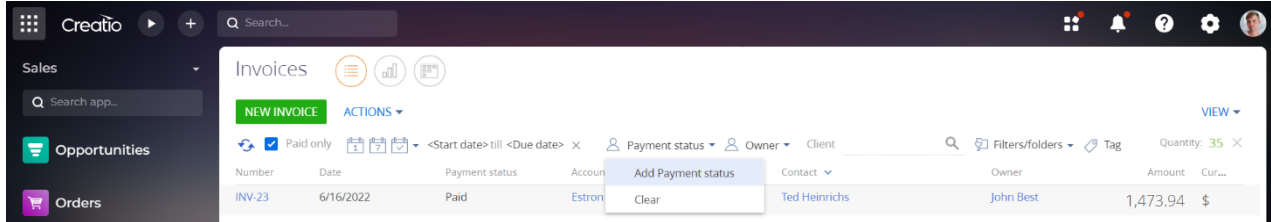
06.10.2023

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Product description

Sales'Up Quick Filters for Creatio is a solution that allows you to dynamically set up quick filtering in system sections and details without involving developers. The module helps to quickly add/change configured quick filters in any system registries. Configuration is performed in a separate convenient setup wizard.



The product can be used by companies in any industry or business domain because it offers universal functionality applicable to any object of a system.

Utilization options

- Filtering by section record date;
- Filtering by owner;
- Display / not display of archive records;
- Display / not display of records with statuses;
- Disabling standard filtering and setting up custom one;
- Setting the order in which filters are displayed in registers.

Opportunities

- Adding an unlimited number of settings;
- Setting up quick filters in sections and details;
- Filtering by columns of the section/detail object;
- Adding custom advanced filters in the required order;
- Setting filtering templates;

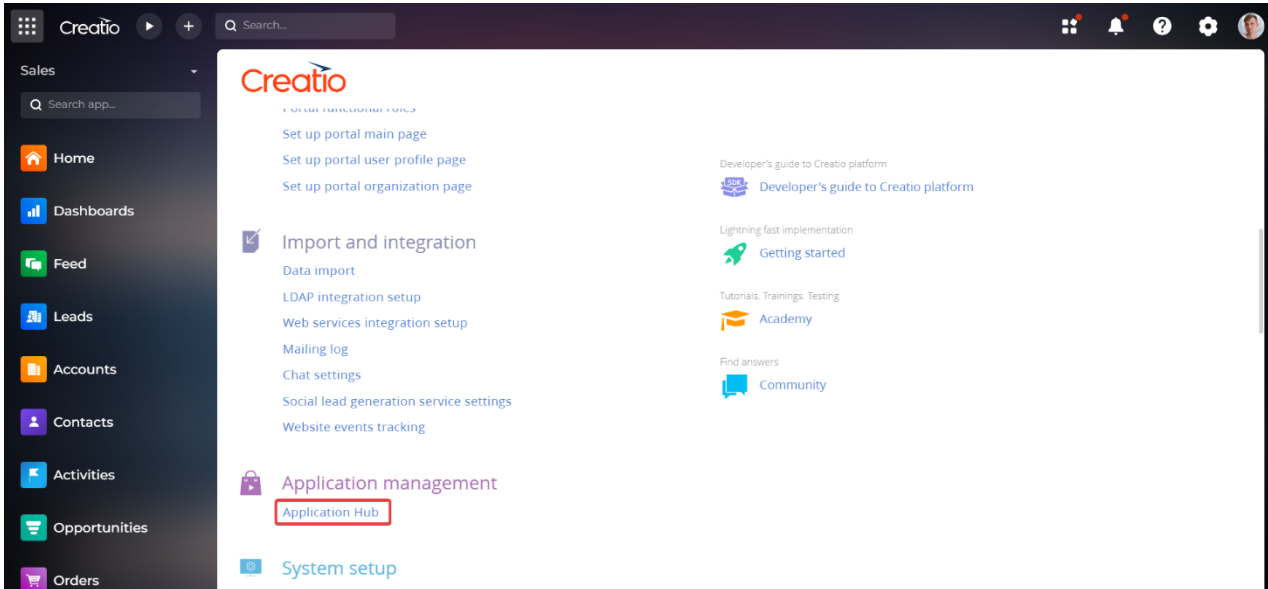
Technical requirements

The product is compatible with all products on the Creatio platform version 7.16.0 and higher.

Product installation and setup

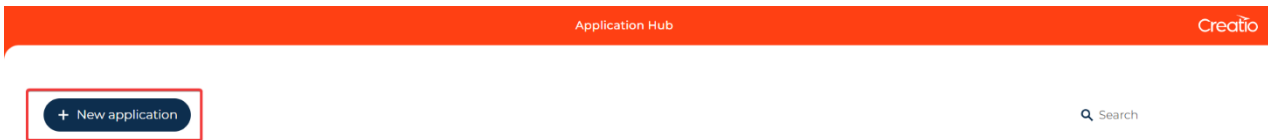
Product installation

To install packages, click on the  button and go to the «Application Hub».

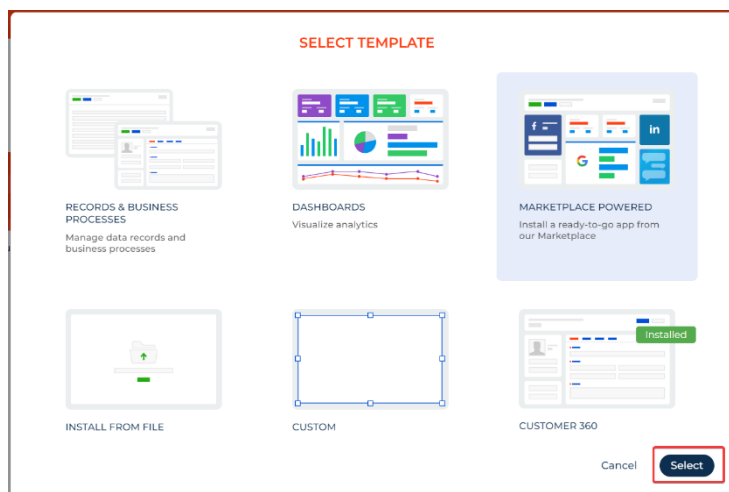


Next, go to the "Application Hub" section.

On the «Application Hub» page click on the «New application» button.



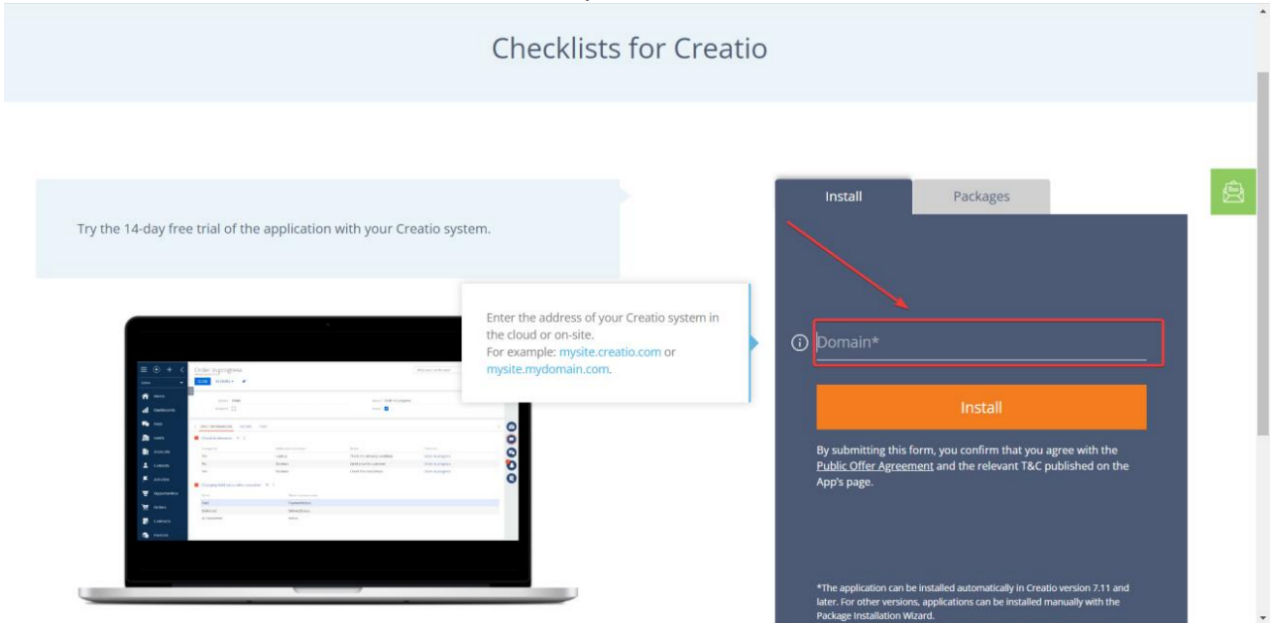
Select the «Marketplace Powered» block and click the «Select» button.



Click the «Install» button on the product page.

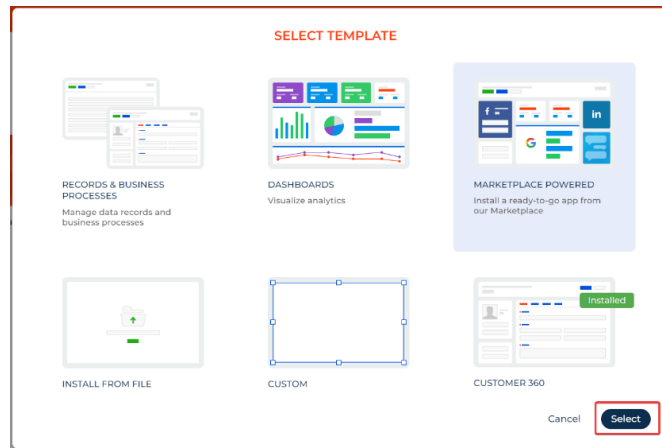


Enter the address of the Creatio website on which you want to install the product.



After the installation is complete, you will be taken to the Creatio website login page.

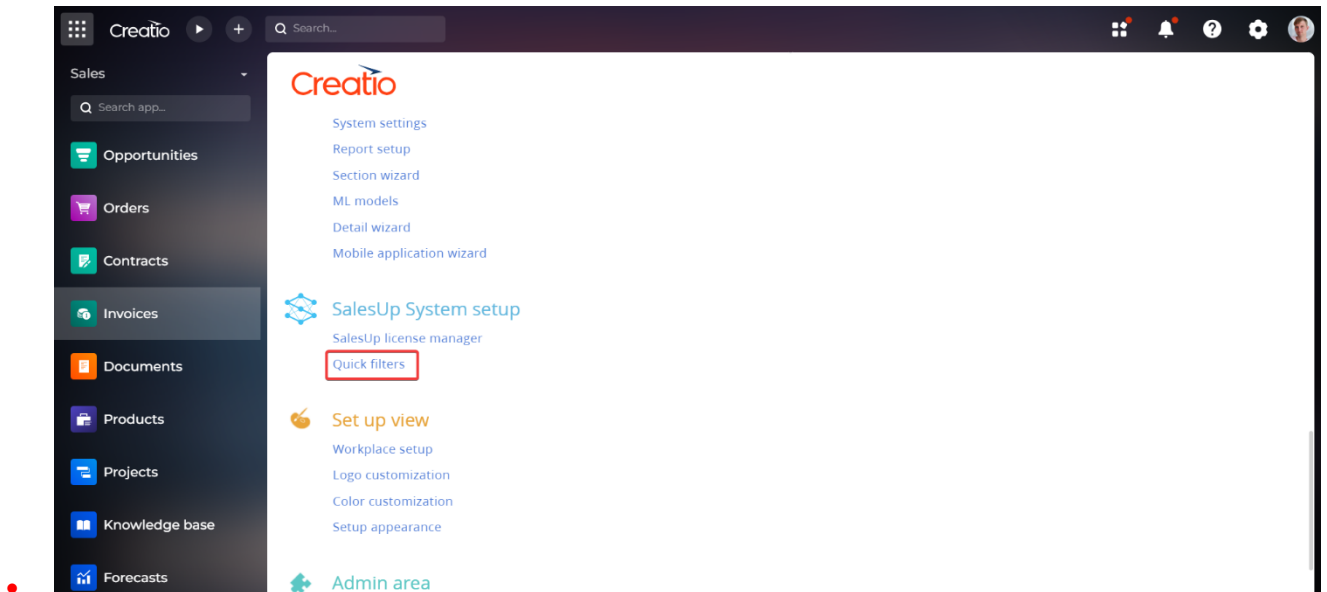
If you are installing a product package from a file, you must request an up-to-date package from Sales'Up support. Then, on the " Application hub " page, click "New application" and select "Install from file", specify the path to the archive with the package and complete the installation.



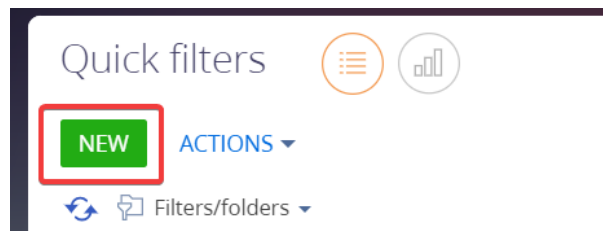
General settings

Creating a new setting

To set up, go to the "System Designer", in the "Sales'Up System setup" block, select the "Quick filters" option.



To set up and customize a quick filter, click the «New» button in the registry of the "Quick Filters" section.



Setting up the page profile

On the new record page, you must fill in all required and additional fields:

- **Name** – title by which the current setting will be identified. It is recommended to enter a unique name;
- **Object** – the object for which the setting will be applied. Filters will be displayed on all sections and details of the current object. For example, Invoices;
- **Module** – section to which the setting will be applied. If specified, filters will only be displayed in the selected section;
- **Detail** – detail to which the setting will be applied. If specified, filters will only be displayed on the selected part. For example, Products;
- **Active** – indicates the activity status of the quick filter setting;
- **Disable standard filters** – if "Yes" is selected, the standard quick filters in the registry of the selected object will be disabled. At the same time, the Filters/Groups button will be available;

Invoices

CLOSE ACTIONS ▾

Name* Invoices Active

Object Invoice Disalbe standart filters

Module _____ Detail _____

To save a new record, press “Save”.

Filtering elements setup

Adding a registry filter setting element

To add a registry filter element, click the "+" button on the "Registry filter settings elements" detail

Invoices

CLOSE ACTIONS ▾

Name* Invoices Active

Object Invoice Disalbe standart filters

Module _____ Detail _____

< ITEMS ATTACHMENTS AND NOTES FEED >

Registry filter settings elements **+** ↻ ↗

On the record page of the "Registry filter settings elements" detail, you need to fill in the fields:

- **Name** – title of the element. It is filled automatically with the name of the selected column when the "Simple (object field)" type is selected. If necessary, it can be changed;
- **Type** – select the type of quick filter. By default, the type is "Simple (object field)", but it can be changed to " Boolean (advanced filter)" or " Extended (advanced filter with parameter)";
- **Column** – specifies the column of the selected object to which the quick filter of the registry will apply.

Invoices / Grid filters setting item

SAVE CANCEL ACTIONS ▾

Name* Date

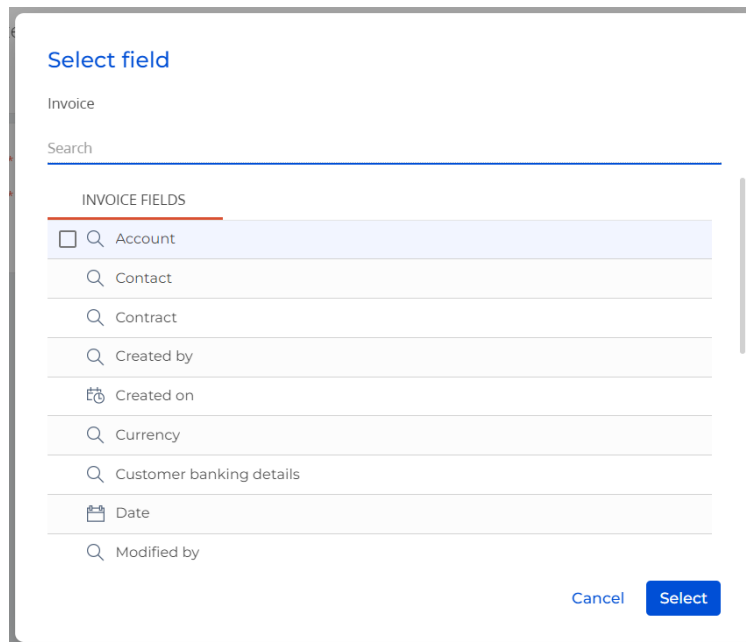
Type* Simple (object field)

Column Date

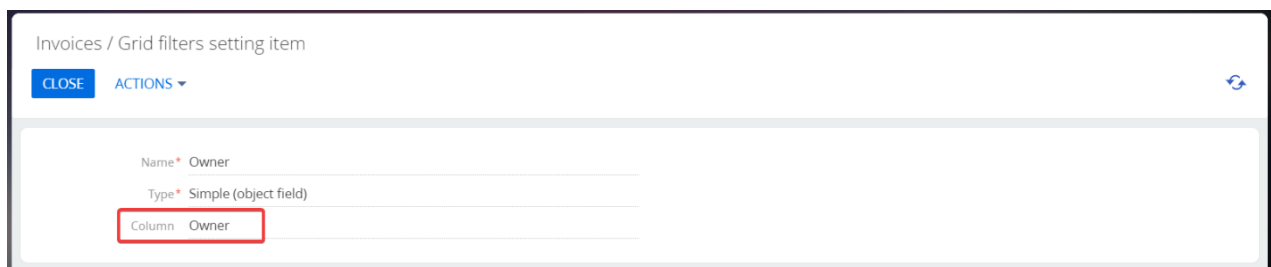
To save a new record, press “Save”.

Element with «Simple (object field) » type



To set up a quick filter, you need to select the column of the object to which the quick filter will be referring by specifying the value in the "Column" field. You can select object columns of the "Reference" and "Date" types.



For example. To set up a quick filter in the registry of the "Invoices" section by owner, select the "Owner" column on the "Registry filter settings elements" detail record page.

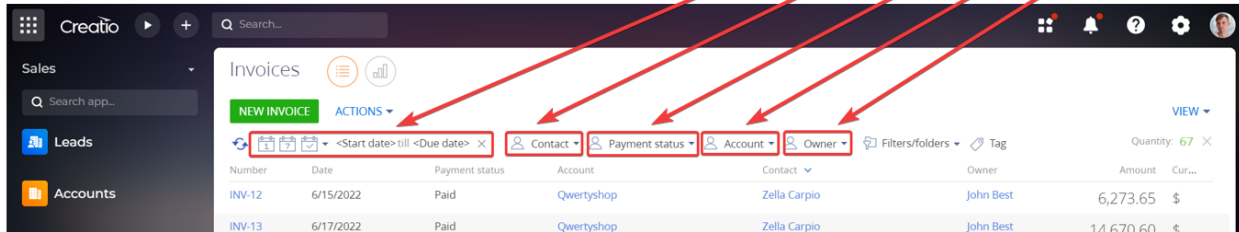


Several quick filters of the "Simple (object field)" type can be set up for the registry, and the user can control the order in which the filters are displayed in the registry by specifying the position for each of the quick filter settings in the "Registry filter settings" detail.

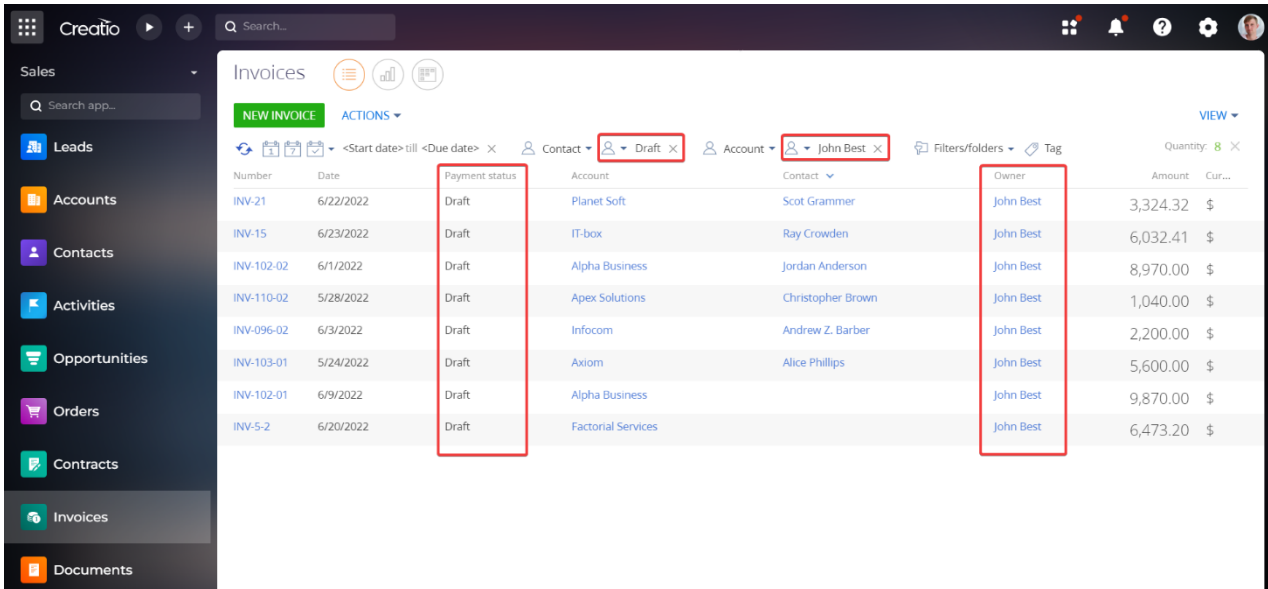
Important! By default, each setting after being added has a priority of 0 (highest). To change the filter position, select the record with the required setting and use the   buttons, specify the positions where the filters with position 0 and higher will be displayed from left to right.

Registry filter settings elements + : ↻ ↗

Name ^	Column name	Type	Position
Date	StartDate	Simple (object field)	0
Contact	Contact	Simple (object field)	1
Payment status	PaymentStatus	Simple (object field)	2
Account	Account	Simple (object field)	3
Owner	Owner	Simple (object field)	4



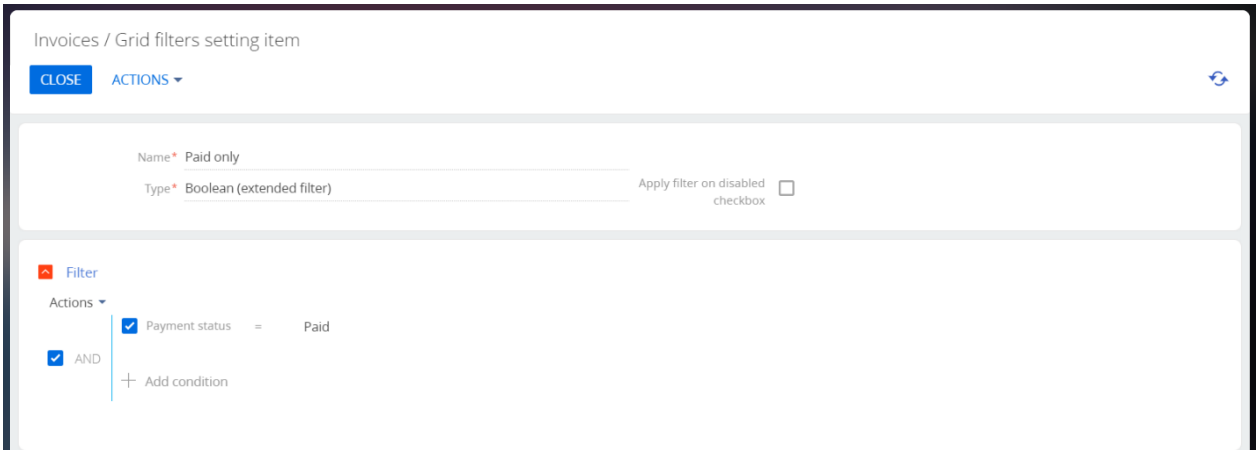
When you select a value in the quick filter, the registry is automatically reloaded taking into account the specified filter.



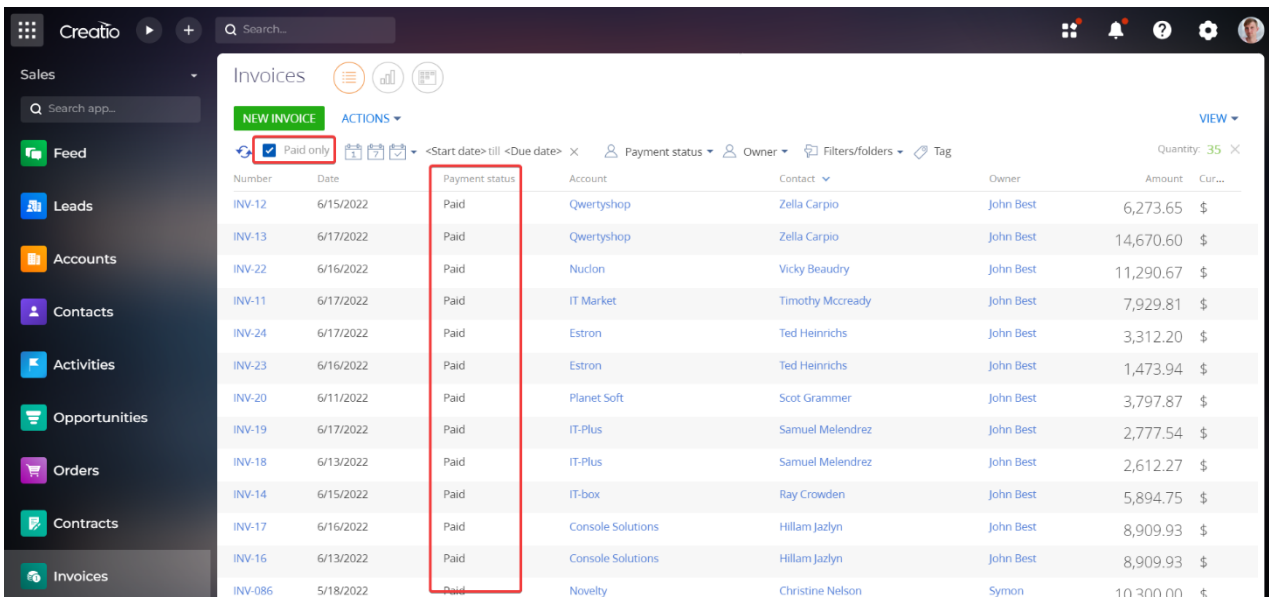
Element with «Boolean (extended filter) » type

When you change the type from Simple (object field) to Boolean (advanced filter), the part with the advanced filter is displayed. Fill in the name of the future filter setting, and using the standard advanced filtering functionality, add a condition for the future quick filter. After configuring and saving the setting, the quick filter will be displayed in the registry as a check box. When activated (the checkbox value is Yes), the filter will be applied, and when inactive (the checkbox value is No), the filter will not be applied, accordingly.

For example. The settings for displaying only paid invoices in the "Invoices" section of the registry will look like this:



When you select a value in the quick filter, the registry is automatically reloaded taking into account the specified filter.



As with the previous type, you can add several quick filters of the "Boolean (advanced filter)" type to the "Registry filter settings elements" detail and configure the order in which they are displayed in the registry.

Additionally, you can set up a reverse condition when the checkbox is activated.

For example. To hide all paid invoices in the registry of the "Invoices" section after activating the checkbox, in the Quick filter settings, you need to activate the "Apply filter on disabled checkbox" option. In this case, if the checkbox is not active, only paid invoices will be displayed by default.

The setting will look like this:

Invoices / Grid filters setting item

CLOSE ACTIONS

Name* All Invoice statuses

Type* Boolean (extended filter)

Apply filter on disabled checkbox

Filter

Actions

Payment status = Paid

AND

+ Add condition

Registry view when the quick filter is NOT active:

Number	Date	Payment status	Account	Contact	Owner	Amount	Cur...
INV-085-01	4/19/2022	Paid	Milestone Consulting		Mary King	12,200.00	\$
INV-086	5/18/2022	Paid	Novelty	Christine Nelson	Symon Clarke	10,300.00	\$
INV-088	5/14/2022	Paid	Apex Solutions	Andrew Wayne	Mary King	11,900.00	\$
INV-095	5/21/2022	Paid	Alpha Business		John Best	11,300.00	\$
INV-1 (sample)	4/3/2021	Paid	Accom (sample)		Vladyslav Lytvynchuk	5,312.00	\$
INV-10	6/17/2022	Paid	Milestone Consulting		John Best	3,050.00	\$
INV-101-01	6/12/2022	Paid	Alpha Business		John Best	6,360.00	\$
INV-101-02	6/14/2022	Paid	Alpha Business		Mary King	4,800.00	\$
INV-109-02	4/24/2022	Paid	Streamline Development	Bruce Clayton	Mary King	11,725.00	\$
INV-11	6/17/2022	Paid	IT Market	Timothy McCreedy	John Best	7,929.81	\$
INV-12	6/15/2022	Paid	Qwertyshop	Zella Carpio	John Best	6,273.65	\$
INV-13	6/17/2022	Paid	Qwertyshop	Zella Carpio	John Best	14,670.60	\$

Registry view when the quick filter IS active:

Number	Date	Payment status	Account	Contact	Owner	Amount	Cur...
INV-084-01	5/17/2022	Unpaid	Factorial Services		Symon Clarke	8,400.00	\$
INV-085-01	4/19/2022	Paid	Milestone Consulting		Mary King	12,200.00	\$
INV-086	5/18/2022	Paid	Novelty	Christine Nelson	Symon Clarke	10,300.00	\$
INV-088	5/14/2022	Paid	Apex Solutions	Andrew Wayne	Mary King	11,900.00	\$
INV-089-01	6/4/2022	Draft	Streamline Development	Bruce Clayton	Mary King	8,250.00	\$
INV-094-01	5/24/2022	Partially paid	Axiom	Alice Phillips	John Best	9,750.23	\$
INV-095	5/21/2022	Paid	Alpha Business		John Best	11,300.00	\$
INV-095-02	5/21/2022	Partially paid	Alpha Business	Alexander Wilson	John Best	3,100.00	\$
INV-096-01	5/26/2022	Unpaid	Infocom	Andrew Z. Barber	John Best	7,215.00	\$
INV-096-02	6/3/2022	Draft	Infocom	Andrew Z. Barber	John Best	2,200.00	\$
INV-098-01	6/1/2022	Draft	Apex Solutions	Christopher Brown	Symon Clarke	10,400.00	\$
INV-099-01	6/21/2022	Draft	Infocom	Andrew Z. Barber	Symon	326.00	\$

Element with the «Extended (advanced filter with parameters)» type

Allows you to add filter conditions to the quick filter.

For example. In the "Invoices" section, you need to find the account by the name (full or partial) of the account.

Invoices / Grid filters setting item

Name* Client

Type* Extended (extended filter with parameter)


Filter

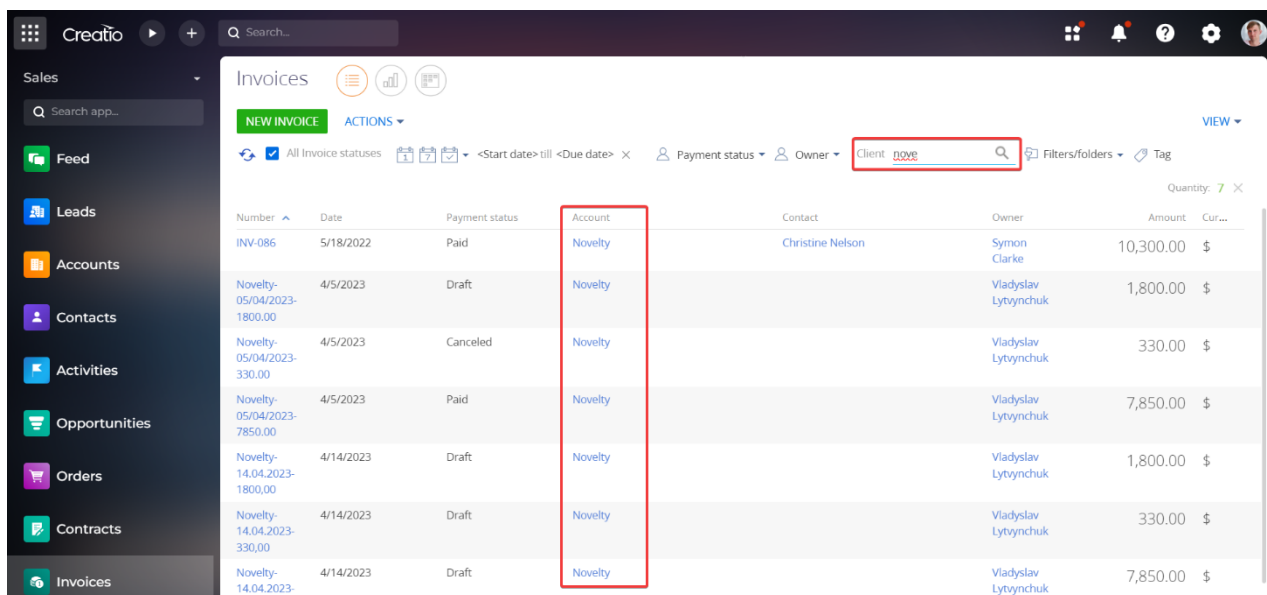
Actions

Account.Name contains Grid filter parameter

AND

In the registry for which the quick filter is configured, the added filter will be displayed. By default, all registry records will be displayed.

After entering the full or partial name of the account and clicking the  button or the "ENTER" on the keyboard, the filter will display all invoices with the account name that has the value specified in the filter search field.



The screenshot shows the Creatio software interface. The left sidebar contains navigation options: Sales, Feed, Leads, Accounts, Contacts, Activities, Opportunities, Orders, Contracts, and Invoices. The main area displays the 'Invoices' section with a search bar containing 'Client nove'. Below the search bar, a table of invoices is shown. A red box highlights the 'Account' column, which contains the name 'Novelty' for all visible rows. The table columns are: Number, Date, Payment status, Account, Contact, Owner, Amount, and Cur... (Currency). The first row is 'INV-086' dated '5/18/2022' with a 'Paid' status, owned by 'Symon Clarke'. Other rows are dated '4/5/2023' and '4/14/2023' with various statuses like 'Draft', 'Canceled', and 'Paid'.

Number	Date	Payment status	Account	Contact	Owner	Amount	Cur...
INV-086	5/18/2022	Paid	Novelty	Christine Nelson	Symon Clarke	10,300.00	\$
Novelty-05/04/2023-1800.00	4/5/2023	Draft	Novelty		Vladyslav Lytvynchuk	1,800.00	\$
Novelty-05/04/2023-330.00	4/5/2023	Canceled	Novelty		Vladyslav Lytvynchuk	330.00	\$
Novelty-05/04/2023-7850.00	4/5/2023	Paid	Novelty		Vladyslav Lytvynchuk	7,850.00	\$
Novelty-14.04.2023-1800.00	4/14/2023	Draft	Novelty		Vladyslav Lytvynchuk	1,800.00	\$
Novelty-14.04.2023-330.00	4/14/2023	Draft	Novelty		Vladyslav Lytvynchuk	330.00	\$
Novelty-14.04.2023-	4/14/2023	Draft	Novelty		Vladyslav Lytvynchuk	7,850.00	\$

Adding a registry filter setting element at the catalog level

To set up filtering at the catalog level (registry filter settings catalog levels), click the "+" button.

Name ^	Column name	Type	Position
Client		Extended (extended filter with parameter)	0
Date	StartDate	Simple (object field)	0
Payment status	PaymentStatus	Simple (object field)	1
Owner	Owner	Simple (object field)	2
All Invoice statuses		Boolean (extended filter)	3

No data

Select field

Invoice

Search

INVOICE FIELDS
RELATED OBJECTS

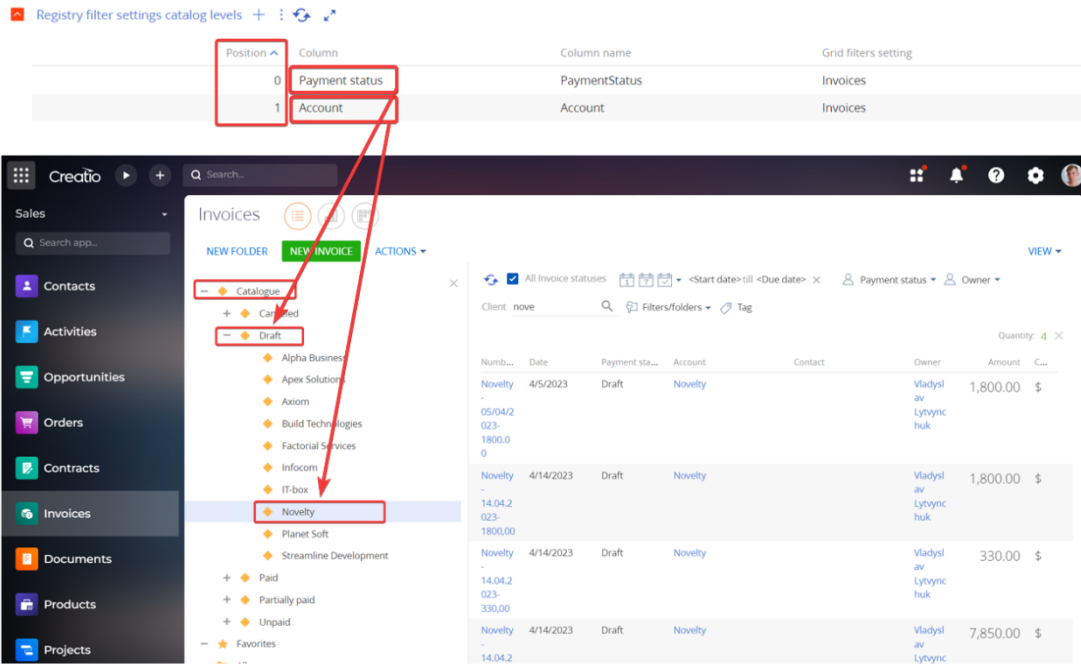
-
-
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Cancel Select

After adding columns for catalog levels to the "Registry filter settings catalog levels" details, the dynamic groups of the configurable registry will display a catalog with levels specified according to the setting positions.

For example. To display the "Invoice" section of the catalog in the dynamic groups, where at the first level all invoices will be filtered by payment status, and at the second level by payment status and account, it is necessary to add the "Payment status" column with the position "0" and the "Account" column with the position "1" to the "Registry filter settings catalog levels" detail.

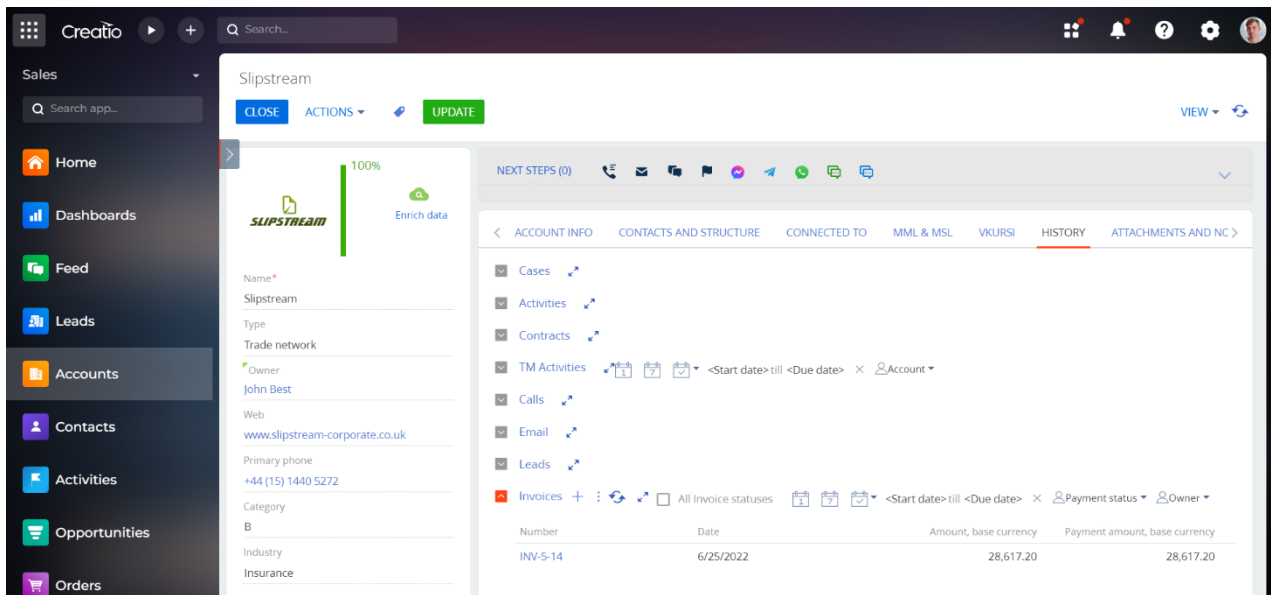
Catalog settings can have an unlimited number of levels.



Filtering on details

Setting up customized filtering is available not only in registry elements, but also in detail registries.

To set up quick filters on details, you need to specify the object detail for which the quick filter will be applied in the "Detail" field of the quick filter setting.



CONTACT US:

salesup-it.com
care@salesup-it.com

+38 050 140 11 22
Kyiv, Lobanovskoho Avenue, 119B

