

# Customize CRM on your own

## Setup Company Details

You can personalize the application by uploading your Company logo and details to your **CRM** service; as a result, company logo appears on your home page. Also, your company logo and address can be used in email templates and *Inventory* tools such as *Quotes* and *Invoice*, when exported to PDF files.

Steps to update your Company details in **CRM**:

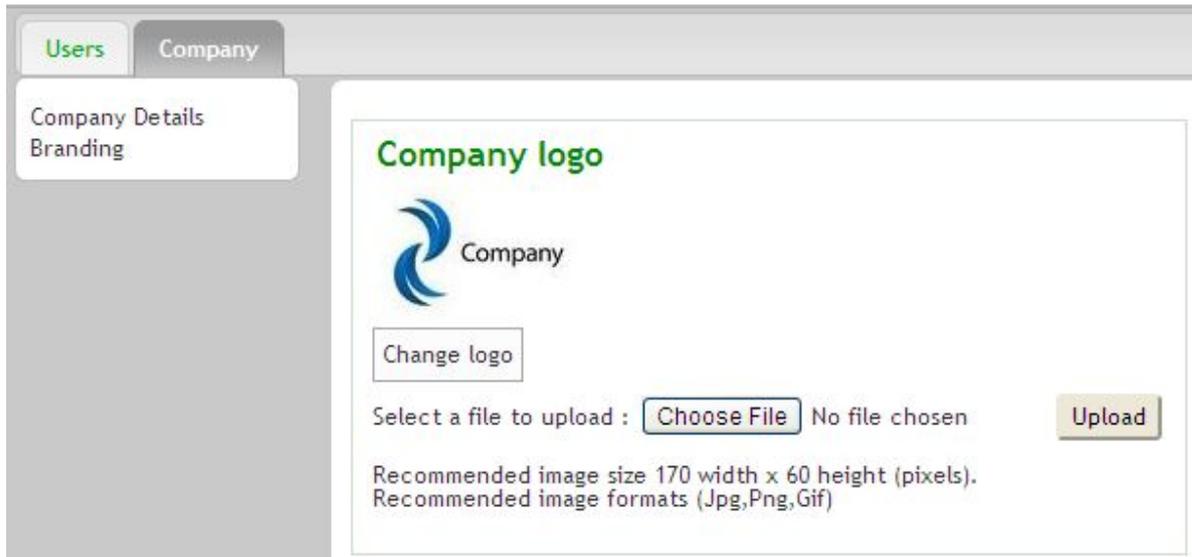
Go to **CRM Settings Icon**  > **On-Demand Admin** > **Company**. Fill up the fields in *Company Details* block and click **Save**.

### Company Details

Name	<input type="text"/>
Website address	<input type="text"/>
Company Size	<input type="text"/>
Industry	<input type="text" value=""/>
Street 1	<input type="text"/>
Street 2	<input type="text"/>
City	<input type="text"/>
Postal Code	<input type="text"/>
State	<input type="text"/>
Country	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>

Steps to upload your company logo in **CRM** service:

Go to **Branding** > **Change logo**, click **Choose File** to browse for your company logo and click **Upload** to save changes.

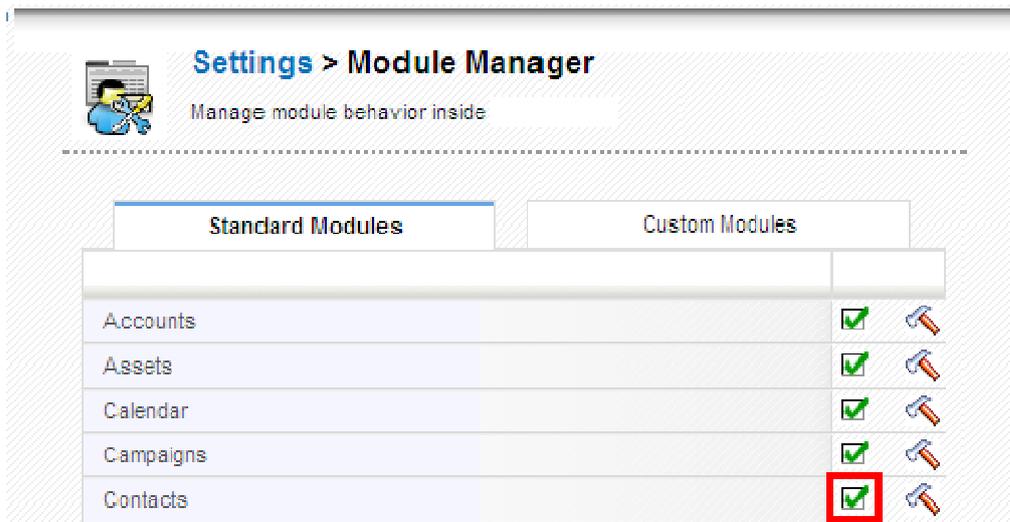


▲ To enter your company data in **CRM open source**, go to **Settings > Company Details** (This can be found under **Communication Templates** block). Fill up the fields in **Company Details** block, browse for your company logo and click **Save** to save your details. Make sure that you upload .jpg or .JPEG images as your company logo. If you use GIF or PNG format, just change the extension to JPEG because it is required for its use in PDF files.

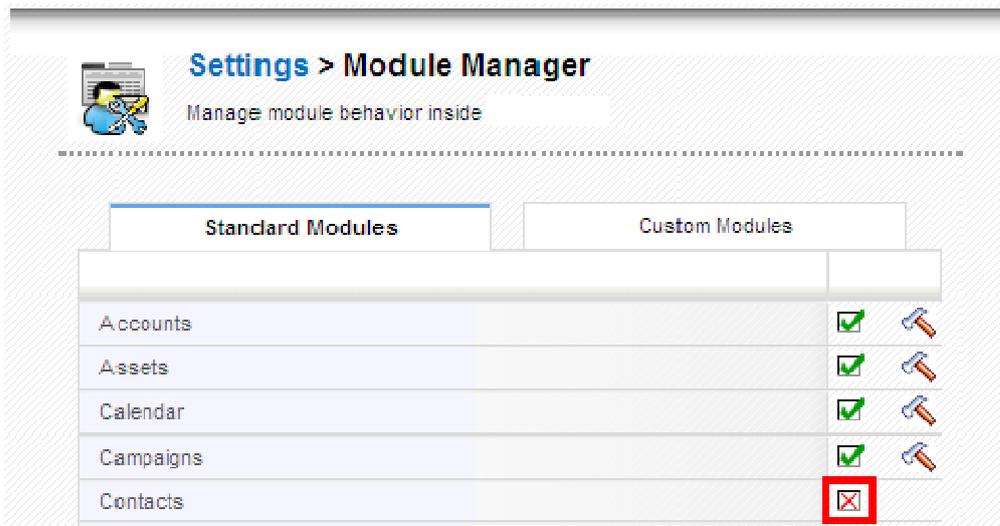
## Choose Modules

**CRM** includes a flexible framework with over 20 modules covering *Sales, Support, Marketing, Inventory, Projects, Calendar* and more. Using the **Module Manager**, you can enable, disable and configure the settings for each module. You can also import new modules from the **Module Manager**.

Steps to configure modules in **CRM**: Go to CRM Settings Icon  > **CRM Settings > Module Manager**. Click on green tick mark icon, highlighted below, to disable the module(s) that you would not plan to use.



Click on red cross mark icon, highlighted below, to enable the module.



If you want to limit certain modules to only some users, you can use *Profiles* in the *Users Management* section.

## Configure Fields

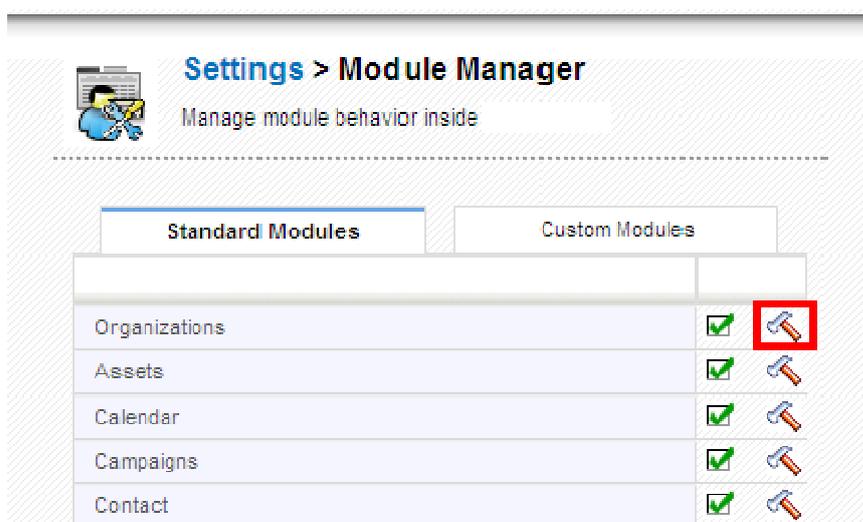
### Fields

**CRM** offers a set of default fields. You can add new custom fields, re-arrange fields, edit field properties, and move fields inside and across blocks.

Steps to configure fields in **CRM**:

1. Go to *Settings > Module Manager*.
2. Click on module settings icon, highlighted below, at extreme right of each module.
3. Click *layout editor*.

Configure a specific field; for instance, *Organizations*

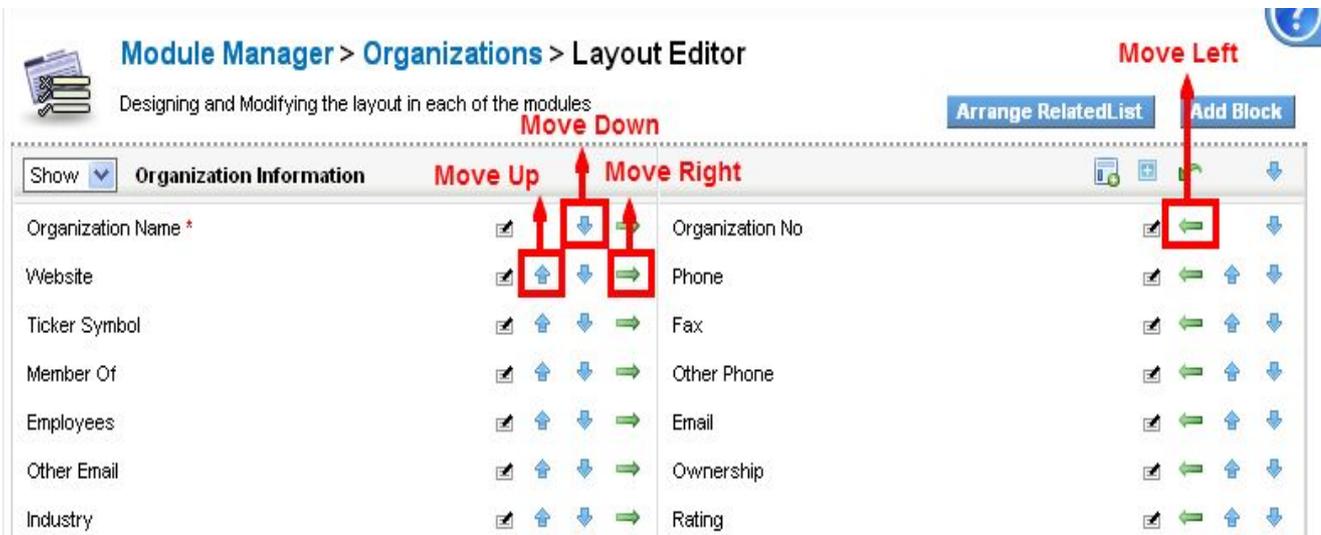


Now click *Layout Editor*



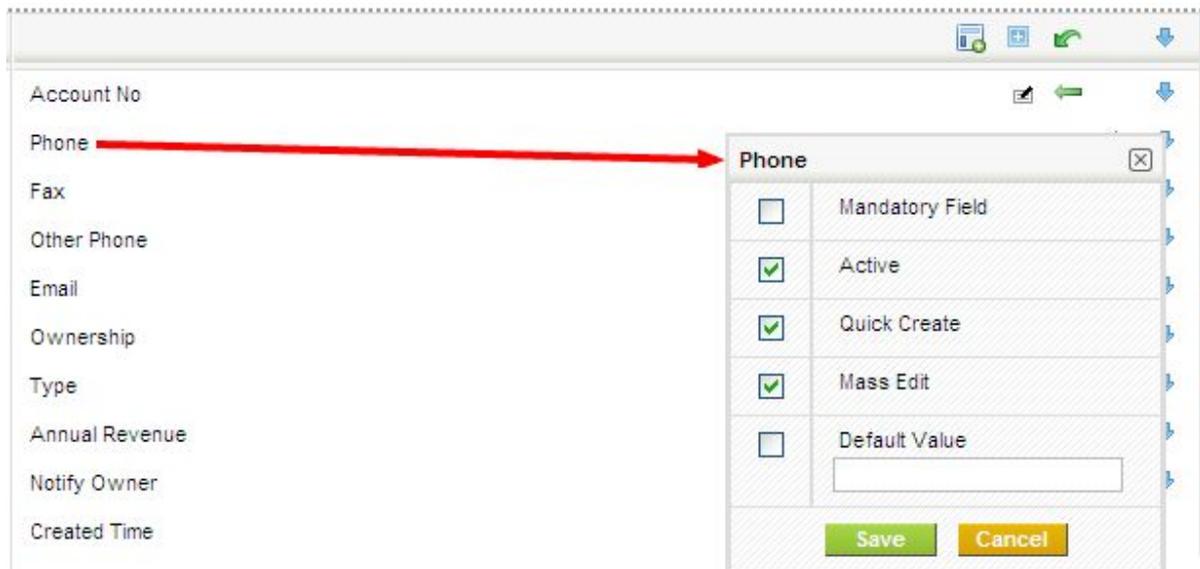
### Re-arrange fields

You can re-arrange fields within a block using the arrows provided for each field as shown below.



### Edit field properties

You can change some of the properties of a field by clicking on the edit icon provided for each field.



**Mandatory field** This field will be made mandatory for the Users to fill in.

**Active** If enabled, displays the field or else hides the field.

**Quick Create** The field is available in the quick create of the module.

**Mass Edit** If enabled, the field is available for mass edit.

**Default Value** Used to set a default value in a field.

 Some Checkboxes are disabled in some fields, because their properties cannot be edited (which otherwise can lead to inconsistency in the CRM).

## Add custom fields

You can add custom fields to any block by clicking on the icon highlighted below.



## Move fields

You can move fields from one block to another. When you click move-field Icon, highlighted below, a popup will appear which will show the list of fields from other blocks. You can select field(s) and click **Apply** to save changes.

Module Manager > Accounts > Layout Editor  
Designing and Modifying the layout in each of the modules

Arrange RelatedList Add Block

Show Account Information

Account Name *	✓ ↓ →	Account No	✓ ← ↓
Website	✓ ↑ ↓ →	Phone	✓ ← ↑ ↓
Ticker Symbol	✓ ↑ ↓ →	Fax	✓ ← ↑ ↓
Member Of	✓ ↑ ↓ →	Other Phone	✓ ← ↑ ↓
Employees	✓ ↑ ↓ →	Email	✓ ← ↑ ↓
Other Email	✓ ↑ ↓ →	Ownership	✓ ← ↑ ↓
Rating	✓ ↑ ↓ →	Type	✓ ← ↑ ↓
Email Opt Out	✓ ↑ ↓ →	Annual Revenue	✓ ← ↑ ↓
Assigned To *	✓ ↑ ↓ →	Notify Owner	✓ ← ↑ ↓
Modified Time	✓ ↑ ↓ →	Created Time	✓ ← ↑
test account	✓ ↑		

## Blocks

Blocks contain set of custom Fields. You can hide the unwanted blocks. Also, you can create a new custom block and place it at any desired location among blocks.

For instance, create new block 'More info', next to Contact information block.

Add Block

Block name

After Account Information

Save Cancel

lock

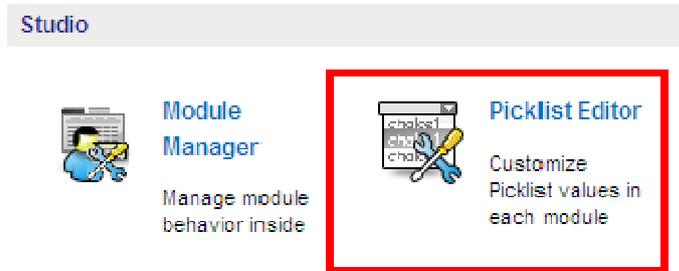
## Modify Picklist Values

As the name itself says, picklist is a dropdown field with list of options available, within which, only one option can be selected. For instance, *Lead status* in *Leads* module. **Picklist Editor** can be used to customize the

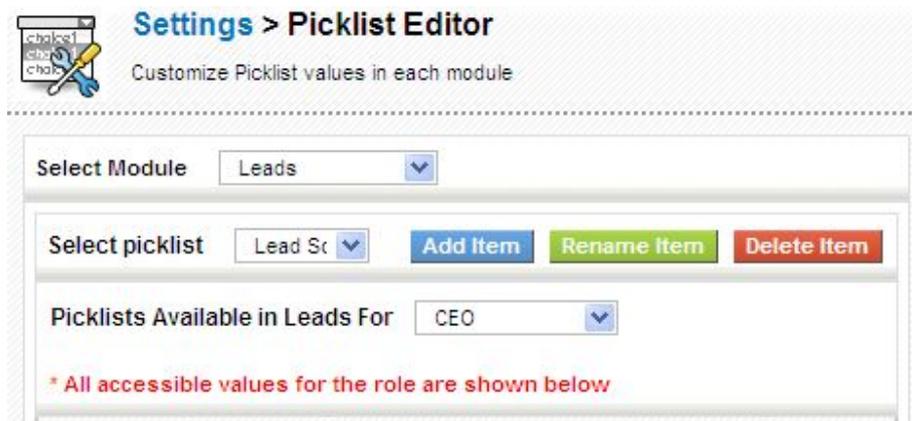
picklist values in different modules. Select a role before performing global actions such as add, edit and, delete; as the picklist values vary across roles.

Steps to customize your picklist values in **CRM**:

Go to **Settings > Picklist Editor**(This can be found under studio block)



To customize picklist, select desired module from **Select Module** dropdown (ex:*Leads*); consequently, **Select picklist** dropdown displays respective picklist fields (*Industry, Lead Source, Lead Status, Rating, Salutation*) available for that module. This dropdown can be used to select the picklist field for performing global actions.

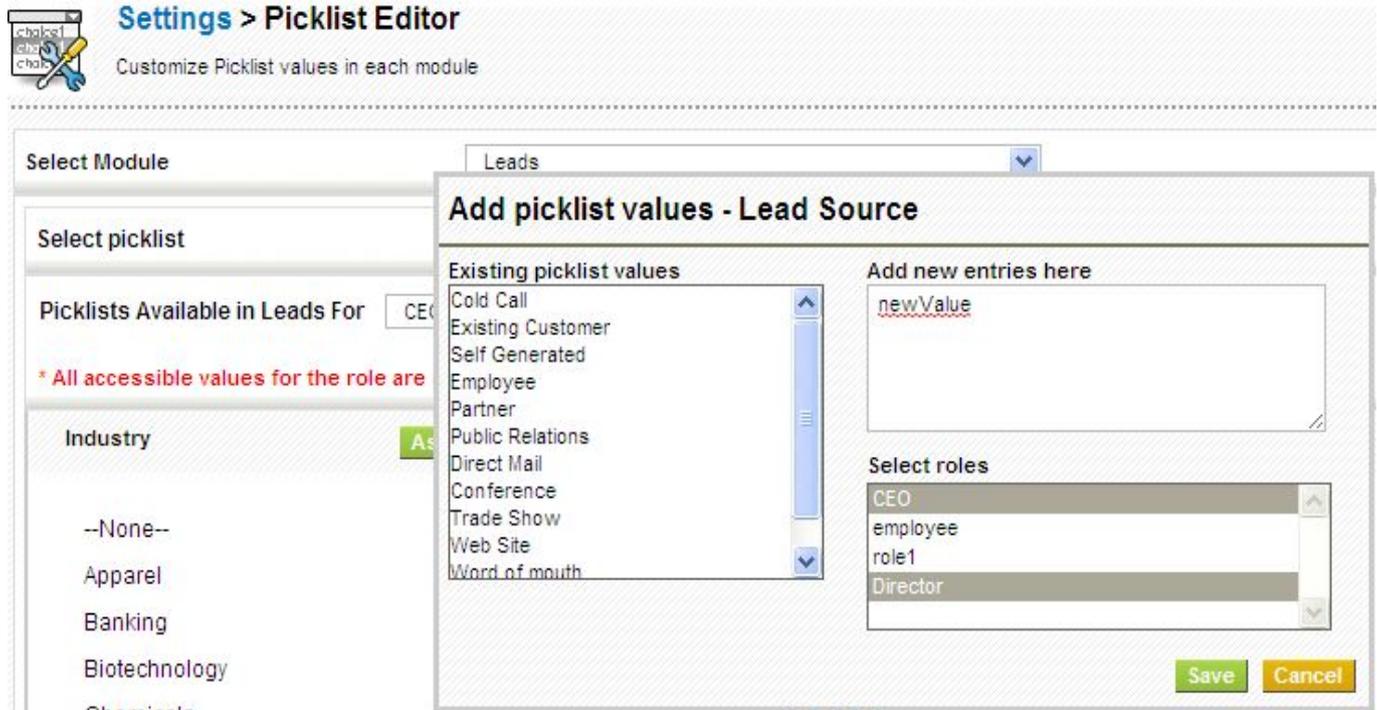


### Add new values to picklist

1. Click on the **Add** button next to the **Select picklist** dropdown.
2. This will bring up a popup with the existing picklist values displayed on the left-hand side.
3. You can add new values in textarea on top-right and assign role(s) on right hand lower side of the popup accordingly.
4. Click **Save** to save your changes.

 You can add multiple values and assign multiple roles at the same time

For instance, add 'newValue' to *Lead source* field in *Leads* module



💡 If you don't select any role for the new picklist values, they will be present in the picklist values but not displayed for any role (other than admin).

### Edit picklist values

1. Click on the **Edit** button next to the **Select picklist** dropdown.
2. This will bring up a popup with the existing picklist values in select box.
3. select a picklist value you intend to edit.
4. you can edit the picklist value in the textbox below the existing picklist values.
5. Once you are done with the changes, click on the **Apply** button to save your changes to the picklist.



## Settings > Picklist Editor

Customize Picklist values in each module

Select Module

Select picklist

Picklist

\* All accounts

Industry

--None--

Apply

Cancel

Apply

Cancel

### Edit picklist values - Lead Source

Select a value to edit:

- Employee
- Partner
- Public Relations
- Direct Mail
- Conference
- Trade Show
- Web Site
- Word of mouth
- Other
- newValue1

Replace with: newValue1

Apply

Cancel

Add Edit Delete

Lead Status

Assign

--None--

Attempted to Contact

Cold

Contact in Future

Contacted

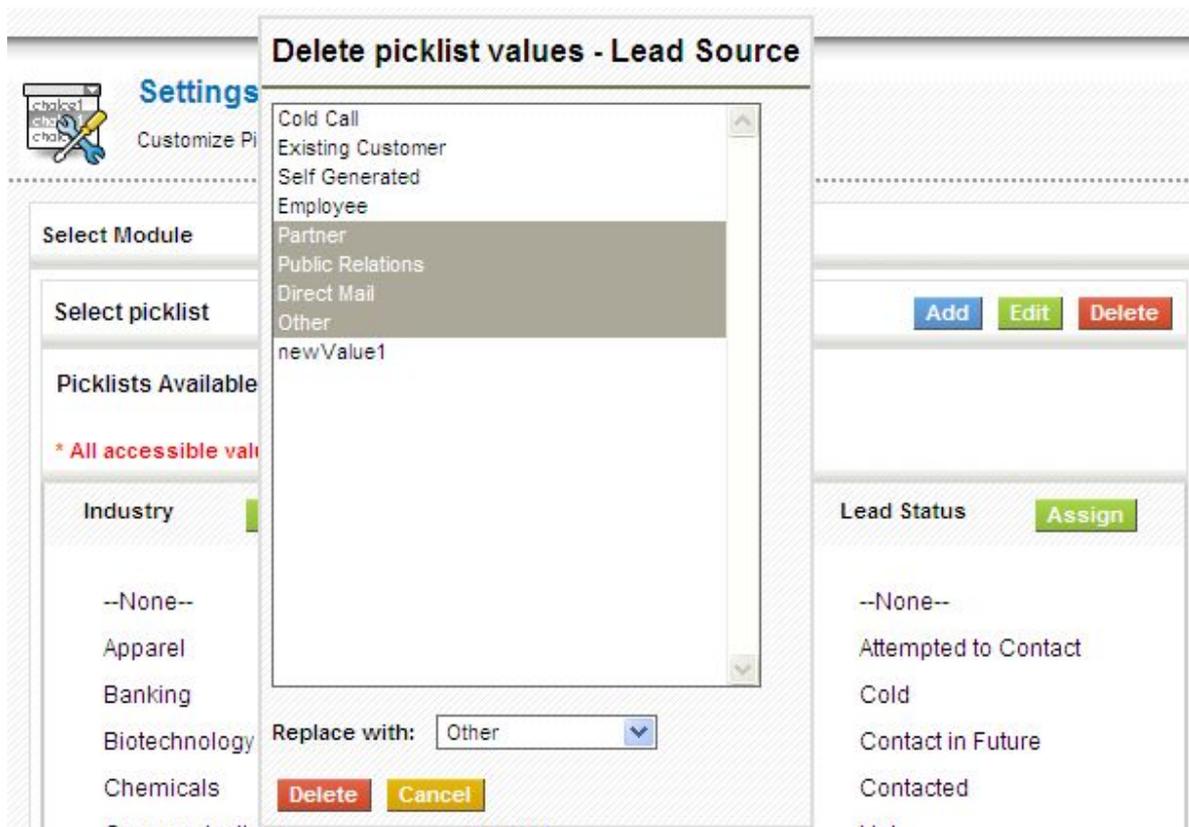
It cannot be replaced with empty value

### Delete existing picklist values

1. Click on the **Delete** button next to the **Select picklist** dropdown.
2. This will bring up a popup with existing picklist values.
3. Delete one or multiple values and select a value from **Replace with** dropdown, to replace all the values with that name.

You cannot select a blank value for replacement

For example, delete picklist values (Partner, Public Relations, Direct Mail, other) and replace with 'Other'.



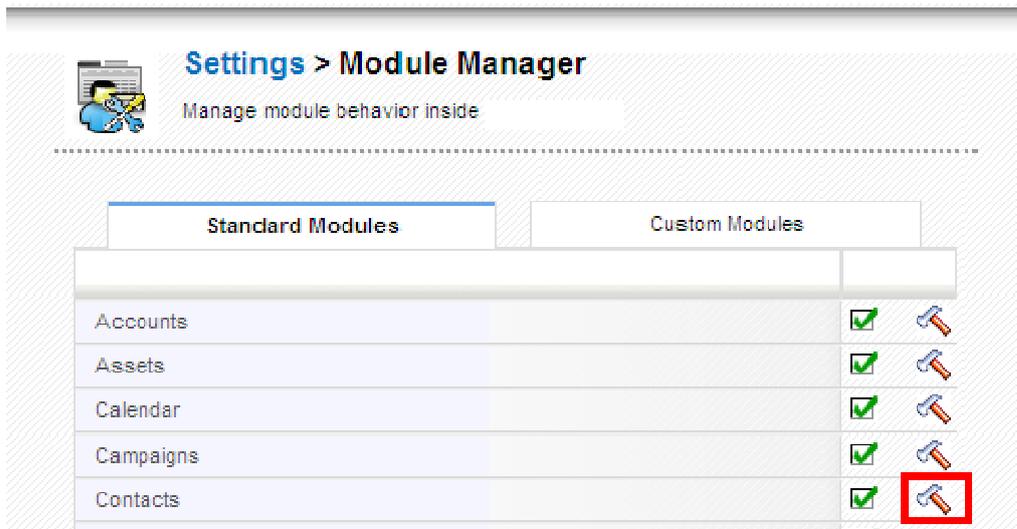
Deleted picklist values will be replaced with another value. The information stored in deleted values will be moved to newly defined value.

 You should have at least one value in picklist.

**CRM** also allows users to create new custom picklist fields using Custom Fields.

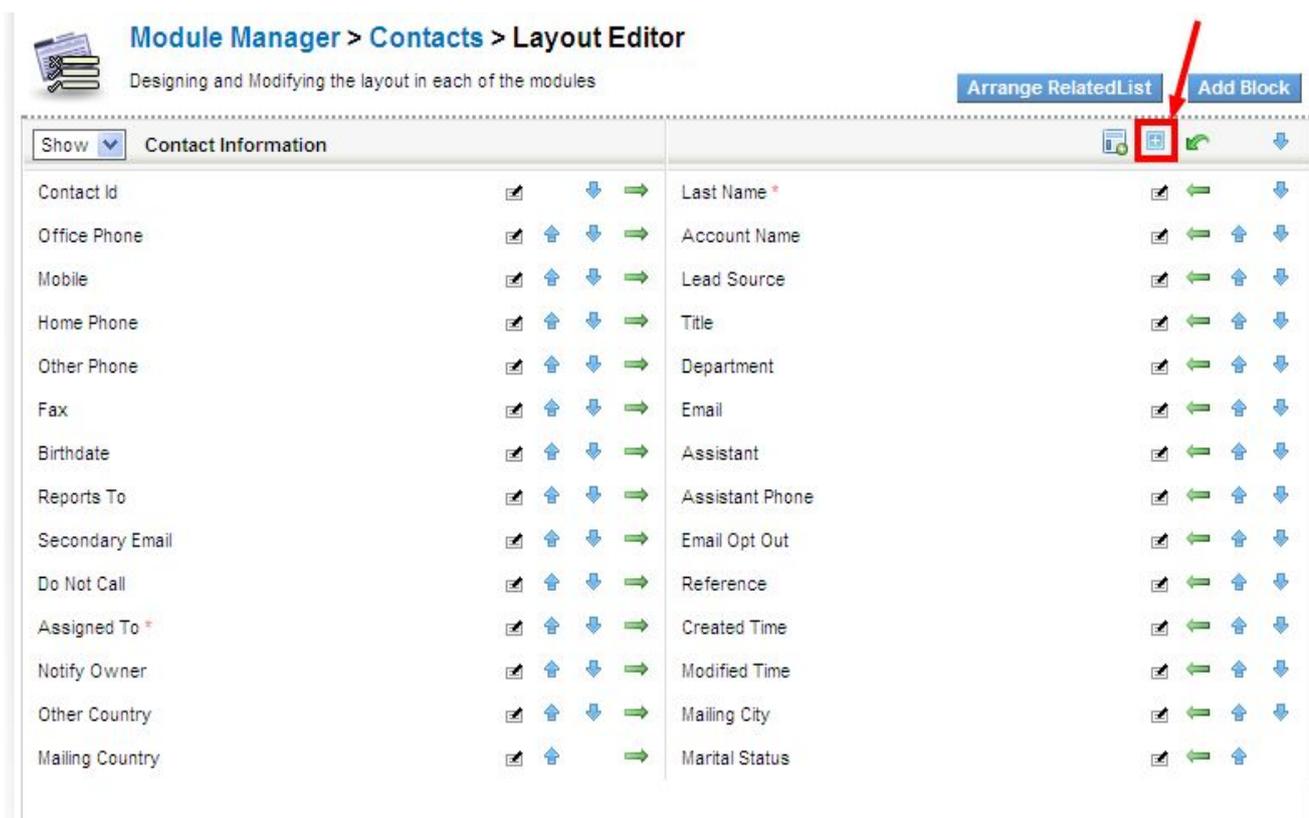
Steps to create new custom picklist field in **CRM**:

1. Go to **Settings > Module Manager**
2. Click on module settings icon, highlighted below, at extreme right of each module.

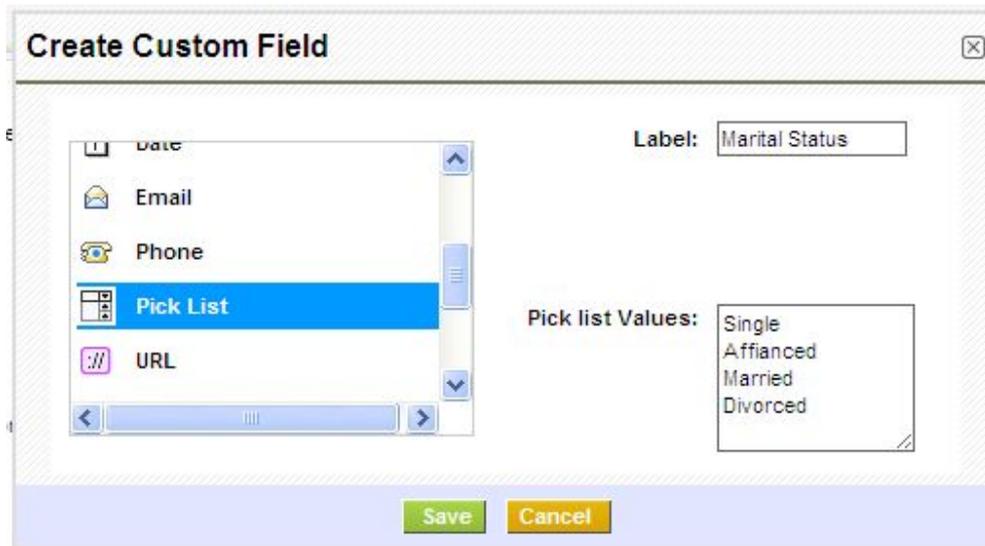


3. Click on *Layout Editor*

4. Click on add custom field icon, highlighted below.



5. Select field type as *Pick List* on left hand side, provide a picklist name in *Label* on top-right, and provide values in *Pick list Values* textarea on right hand lower side of the popup.



## Setup Users

CRM provides a dynamic role-based security. Managing users is done for the purpose of security by restricting user's access to specific modules, fields and to each other's data. Using **Roles**, administrators can control access to specific records and by using **Profiles**, they can control the actions the users can perform on those records. CRM system offers a privilege system that is based upon the following simple looking rules:

- Who can view certain record?
- Who can edit certain record?
- Who can delete certain record?
- Who can create certain record?

## Configure Module Level Sharing Rules

You can configure module specific sharing rules with **Sharing Access**. You can be able to hide or restrict user's access on records with-in a module. Sharing can be set to public (all users view all the records in the module), or private (only users with higher role than the record owner will be able to view the record).

The table explains different options in **Sharing Access**:

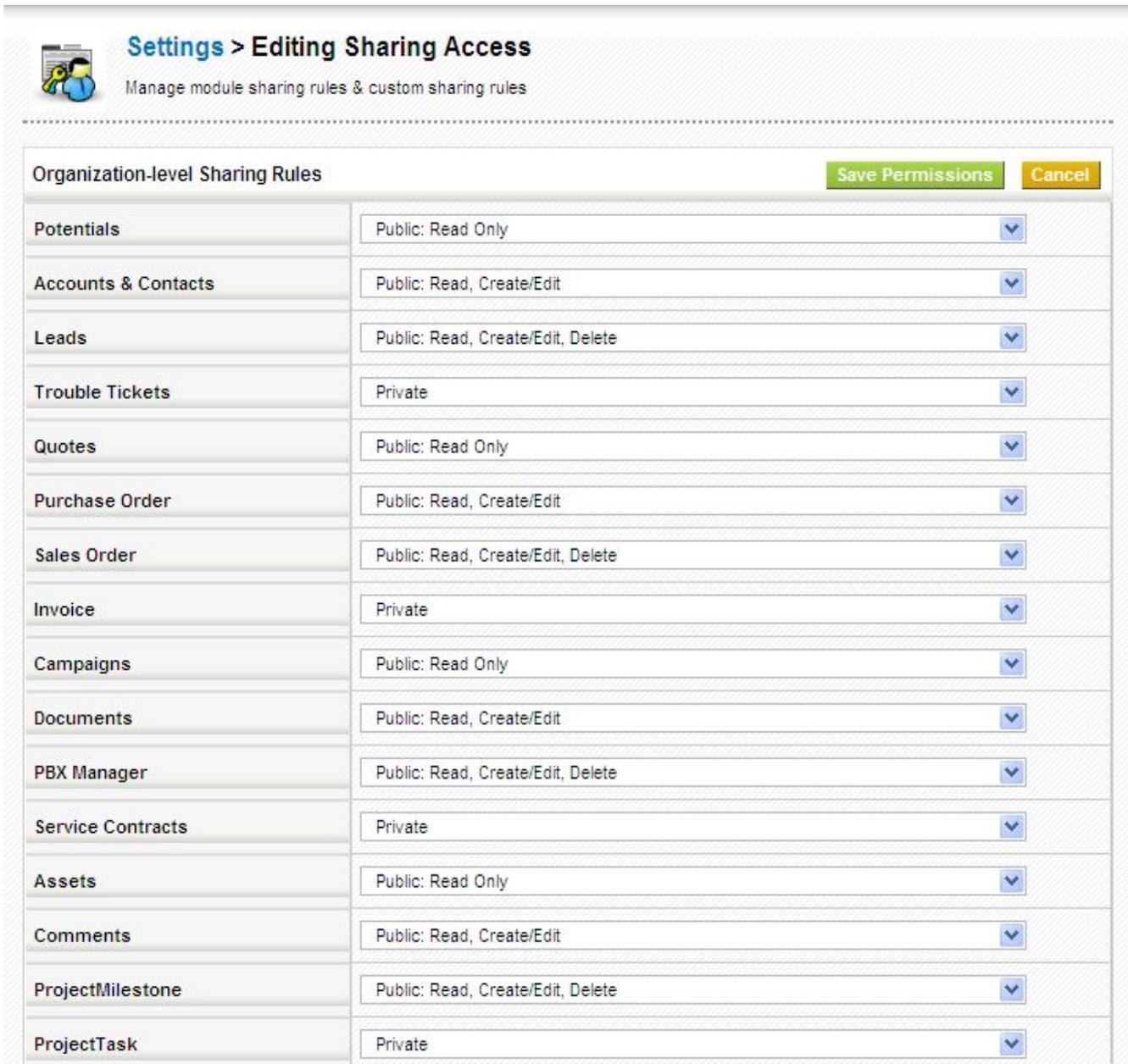
<b>Private</b>	Only the owner and the users with higher role than the owner can access the records
<b>Public (Read Only)</b>	Other users can read, but cannot edit and delete records.
<b>Public (Read, Create/Edit)</b>	Other users cannot delete, but can read, create and edit all records
<b>Public (Read, Create/Edit, Delete)</b>	All Users can do all operations on all records of this module - this is the default setting for all modules (except Calendar)

Steps to configure module specific sharing rules in CRM:

Go to *Settings > Sharing Access > Change Privileges*.

Select desired setting for each module.

Click *Save Permissions* and then click *Recalculate*.



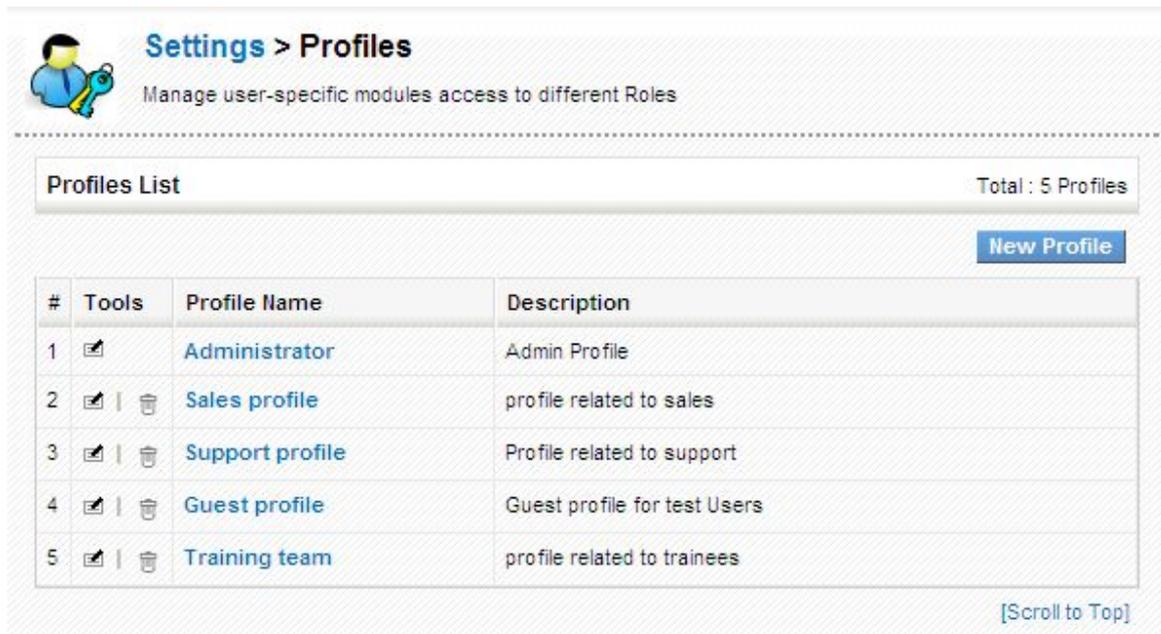
Organization-level Sharing Rules		Save Permissions	Cancel
Potentials	Public: Read Only		
Accounts & Contacts	Public: Read, Create/Edit		
Leads	Public: Read, Create/Edit, Delete		
Trouble Tickets	Private		
Quotes	Public: Read Only		
Purchase Order	Public: Read, Create/Edit		
Sales Order	Public: Read, Create/Edit, Delete		
Invoice	Private		
Campaigns	Public: Read Only		
Documents	Public: Read, Create/Edit		
PBX Manager	Public: Read, Create/Edit, Delete		
Service Contracts	Private		
Assets	Public: Read Only		
Comments	Public: Read, Create/Edit		
ProjectMilestone	Public: Read, Create/Edit, Delete		
ProjectTask	Private		

Administrators can also set *Custom Sharing Rules* from the *Sharing Access* page, if the module specific rules and options do not cover their needs. By using *Custom Sharing Rules*, admin user can make certain modules of higher hierarchy accessible to role at lower hierarchy.

## Configure Profiles

Profiles can be used to regulate user's access on modules, fields, and records within them. With profiles you can set the user privileges to delete, create/edit or view data. Like **Sharing Access**, profiles also play vital role in ensuring security by limiting the activities on records. Please note that the settings of the global privileges are always superior to the other privilege settings. Roles are based on profiles. **CRM** comes with a set of pre-defined profiles (ex: 'Administrator') which you can use and change but not delete.

## List of profiles in CRM



**Settings > Profiles**  
Manage user-specific modules access to different Roles

Profiles List Total : 5 Profiles

[New Profile](#)

#	Tools	Profile Name	Description
1		<a href="#">Administrator</a>	Admin Profile
2		<a href="#">Sales profile</a>	profile related to sales
3		<a href="#">Support profile</a>	Profile related to support
4		<a href="#">Guest profile</a>	Guest profile for test Users
5		<a href="#">Training team</a>	profile related to trainees

[\[Scroll to Top\]](#)

Click the name of a profile to see the details. You may change the profile by clicking the **Edit** button. To create a new profile click the **New Profile** button at the list view.

## Create new profile



## Settings > Profile Privileges

Manage user-specific modules access to different Roles

### Step 1 of 2 : Welcome to Privilege Profile Creator

Select your choice of creating the new profile

\* Profile Name :

Description :

I would like to setup a base profile and edit privileges (Recommended)

Base Profile:

( OR )

I will choose the privileges from scratch (Advanced Users)

[Next >](#)

[Cancel](#)

## Edit modules in a profile



## Settings > Profile Privileges > Viewing "Demo Profile"

Viewing access privileges for "Demo Profile"

### Step 2 of 2 : Define Privileges for <Demo Profile>

Use the options below to set privileges

Finish

Cancel

#### Global Privileges

View all

Allows "Demo Profile" to view all information / modules

Edit all

Allows "Demo Profile" to edit all information / modules

#### Set Privileges for each Module

modules to be shown		Edit Permissions			Fields & Tools Settings
		Create/Edit	View	Delete	
<input checked="" type="checkbox"/>	Dashboards				
<input checked="" type="checkbox"/>	Potentials	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

### Edit fields in a profile

You can edit fields in a module by clicking on icon highlighted below.

### Set Privileges for each Module

modules to be shown		Edit Permissions			Fields & Tools Settings
		Create/Edit	View	Delete	
<input checked="" type="checkbox"/>	Dashboards				
<input checked="" type="checkbox"/>	Potentials	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 <span style="border: 2px solid red; padding: 2px;"> </span>

#### Fields to be shown

<input checked="" type="checkbox"/> Salutation	<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Lead No
<input checked="" type="checkbox"/> Phone	<input type="checkbox"/> * Last Name	<input checked="" type="checkbox"/> Mobile
<input type="checkbox"/> * Company	<input checked="" type="checkbox"/> Fax	<input checked="" type="checkbox"/> Title
<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Lead Source	<input checked="" type="checkbox"/> Website
<input checked="" type="checkbox"/> Industry	<input checked="" type="checkbox"/> Lead Status	<input checked="" type="checkbox"/> Annual Revenue
<input checked="" type="checkbox"/> Rating	<input checked="" type="checkbox"/> No Of Employees	<input type="checkbox"/> * Assigned To
<input checked="" type="checkbox"/> Secondary Email	<input checked="" type="checkbox"/> Created Time	<input checked="" type="checkbox"/> Modified Time
<input checked="" type="checkbox"/> Street	<input checked="" type="checkbox"/> Postal Code	<input checked="" type="checkbox"/> City
<input checked="" type="checkbox"/> Country	<input checked="" type="checkbox"/> State	<input checked="" type="checkbox"/> PO Box
<input checked="" type="checkbox"/> Description	<input checked="" type="checkbox"/> Status	<input checked="" type="checkbox"/> test field

#### Tools to be shown

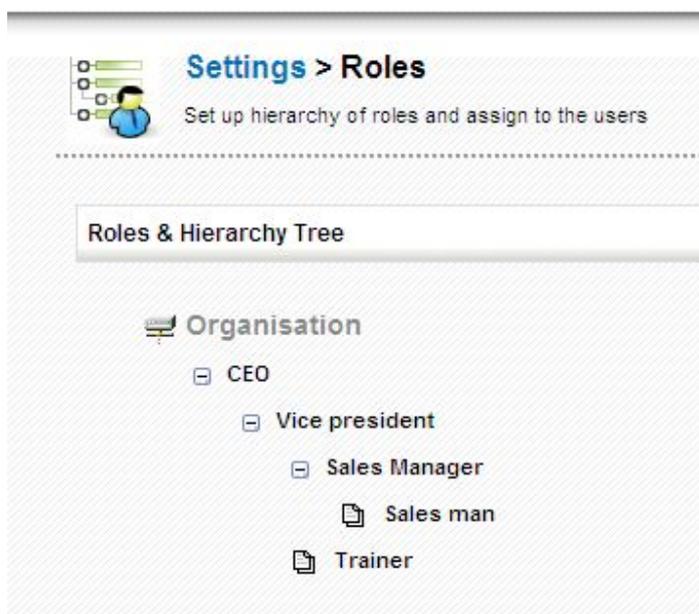
<input checked="" type="checkbox"/> Import	<input checked="" type="checkbox"/> Export	<input checked="" type="checkbox"/> Merge
<input checked="" type="checkbox"/> ConvertLead	<input checked="" type="checkbox"/> DuplicatesHandling	

<input checked="" type="checkbox"/>	Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Calendar	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Email				

Click **Finish** to save your settings.

## Configure Role Hierarchy

When sharing access for a module is set to private, a user's role in the role hierarchy determines what records he/she can access. A user can only view own records (i.e., records assigned to that user), and records assigned to users with a lower role. Role holds a position in a company (ex: sales manager) and can be assigned to multiple users of same functionality. A role can also be assigned to multiple profiles. This can come handy if same person holds two different positions. For instance, 'Rahul' is a Sales manager, but he also participates in support operations; therefore, you could create a role called 'sales and support manager' and assign both support and sales profiles to him. Each role also specifies who they report to, creating a hierarchy.



By moving your computer mouse pointer over a role entry, you can be able to see set of icons by which you can perform operations such as add, edit, move and, delete roles. The "+" function creates a new role which is located in the hierarchical order one level below an existing role. The image below displays a sample for an edit view of an existing or new role. You have to give an unique name and assign desirable profile(s) to the role.

**Settings > Roles > Editing "Sales man"**  
 Editing Properties of "Sales man" Role

---

**Properties of "Sales man"** Save Cancel

*Role Name	Sales man
Reports to	Sales Manager
Profile	

**Profiles Available**

Members

- Administrator
- Sales profile
- Support profile
- Guest profile
- Training team
- Demo Profile

>>

<<

**Assigned Profiles**

Members of "Sales man"

- Demo Profile
- Sales profile

## Add Users

**CRM** features two types of users: Administrator has access to register new users, assign applications, lock users etc; and User, has limited access and can only use applications assigned by admin. When adding a user you should select the role. Privileges of a user depend upon the role you would assign. You can also set admin privileges; it then, gives access to *Settings* page. User privileges are not shown. User information cannot be visible to other users. Access privileges of a user also depend upon settings enabled in *Sharing Access*.

To add new users in CRM, Go to *OD Settings > OD Admin > Add User*.

Fill up the fields in Add User block, and click *Create account* to update your details.

Users

Company

Access Control  
 Add User  
 Account Ownership  
 Restrict IP (BETA)

### Add User

First name :

Last name :

Email address :  (will be used to sign in)

Password :  (6 characters minimum)

Role :  Administrator (can register new users, assign applications, lock users...)  
 User (can only use applications)

To activate **CRM** service, click on X mark icon, highlighted below, under service and click **assign**.

### Manage Application Access by User

		Billing vtiger	
Application Access		✓	✓
User Type	Status	User Name	
Admin	✓	Email (Account Owner)	✓
Normal	✓	rehman@yahoo.co.in	<div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid red; padding: 2px; text-align: center;">✗</div> <div style="border: 1px solid red; padding: 2px; text-align: center;">✗</div> </div> <div style="text-align: center; font-size: small;">assign</div>

Note: To change the status of any application or user click the ✓ icon and select the action under the icon.

Click on edit icon, highlighted below, to edit user information.



## Settings > Users

Manage users who can access

### Users List

To add a new user, please click on [OD-Settings Menu](#) -> [On Demand Admin](#) -> [Add / Invite User](#)

Showing Records 1 - 4



#	Tools	User ID , Name & Role	Email	Admin	Email2	Status
1		<b>admin</b> Administrator (CEO )	<b>Email</b>	on		Active
2		<b>standarduser</b> StandardUser (Vice President )	<b>Email</b>	off		Active
3		Kanumuru Sreenivas (CEO )	<b>Email</b>	on		Active
4		<b>rehman@yahoo.co.in</b> sharief Rehman (Sales Man )	<b>Email</b>	off		Active

Update user information, assign a role and click on **Save**, to save your details.



## Settings > Users > Editing user "sharief Rehman"

Editing details of the user "sharief Rehman"

Save

Cancel

### 1. User Login & Role

*User Name	<input type="text" value="rehman@yahoo.co.in"/>	Admin	<input type="checkbox"/>
*Email	<input type="text" value="rehman@yahoo.co.in"/>	Status	<input type="text" value="Active"/>
First Name	<input type="text" value="Rehman"/>	*Last Name	<input type="text" value="sharief"/>
Default Lead View	<input type="text" value="Today"/>	*Role	<input type="text" value="Sales Manager"/>
Default Calendar View	<input type="text" value="Today"/>		

### 2. Currency Configuration

Currency	<input type="text" value="USA, Dollars"/>	Digit Grouping Pattern	<input type="text" value="123,456,789"/>
Decimal Separator	<input type="text" value="."/>	Digit Grouping Separator	<input type="text" value="."/>
Symbol Placement	<input type="text" value="\$1.0"/>		

Each additional user will add \$12 to your monthly bill. If the user is deleted monthly bill is reduced by \$12

To create a new user in **CRM open source**, go to **Settings > Users > New User**. Fill up the fields, assign a role and click **Save** to update your changes.

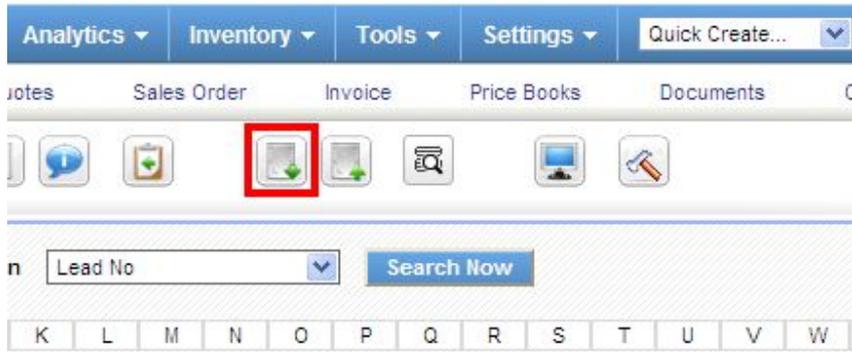
## Import your existing data

**CRM** offers a supportive tool to import customer data such as *Leads, Contacts, Accounts, Potentials, Services, Trouble Tickets, Service Contracts, Products, and Vendors* from CSV files.

Few simple steps to import your customer data in **CRM**(example:*Leads*)

Go to *Sales > Leads*.

Click on import icon, highlighted below, to start importing customer data.



Click **Choose File** and browse for the .csv file that you want to upload and click on **Next**

### Import Leads

**Step 1:** Select File

Leadimport.csv

Supported File Type(s): .CSV

**Step 2:** Specify Format

Character Encoding: UTF-8

Delimiter: , (comma)

Has Header:

**Step 3:** Duplicate Record Handling ( Select this option to enable and set duplicate merge criteria )

Enable **Save as Custom Mapping** and provide a name if you'll be using identical mapping many times in future; it then, appears in **Use Saved Mapping** picklist. You can provide a default value in the **Default Value** textbox available for each field. Click on **Import** to import the data.

## Import Leads

### Step 4: Map the Columns to Module Fields

Use Saved Mapping

C SV Header	Row 1	CRM Fields	Default Value
First Name	Rehman	<input type="text" value="First Name"/>	<input type="text"/>
Last Name	shaik	<input type="text" value="Last Name (*)"/>	<input type="text"/>
Phone	45789	<input type="text" value="Phone"/>	<input type="text"/>
Mobile	9654845	<input type="text" value="Mobile"/>	<input type="text"/>
Company		<input type="text" value="Company (*)"/>	<input type="text"/>
Fax	644245645	<input type="text" value="Fax"/>	<input type="text"/>
Email	Rehman@gmail.com	<input type="text" value="Email"/>	<input type="text"/>

Save as Custom Mapping :

History of number of records imported, created, overwritten, skipped, merged and, failed will be displayed after successful mapping.

### Import Leads - Result

Total number of records imported	:	4 / 4
Number of records created	:	4
Number of records overwritten	:	0
Number of records skipped	:	0
Number of records merged	:	0
Total number of records failed	:	0 / 4

[Import More](#) [Last Imported Records](#) [Undo Last Import](#) [Finish](#)

 Mandatory fields should not be left unmapped

## Create Custom Filters

CRM provides an effective search tool that can rapidly filter records in a module. You can be able to limit your search to selected columns and search criteria.

### Create a Custom filter

Select a module and click *Create Filter* link (highlighted below) in the listview of a module.

Search interface with a search bar containing "In Contact Id" and a "Search Now" button. Below the search bar is a navigation bar with letters H through Y. A "Filters" section shows a dropdown menu set to "All" and a "Create Filter" button highlighted with a red box. Below the filters is a table with columns: Title, Account Name, Email, Office Phone, and Assigned To. The table contains three rows of data.

Title	Account Name	Email	Office Phone	Assigned To
Mgr Operations	--	mary_smith@company.com		Administrator
Mgr Operations	--	patricia_johnson@company.com		Administrator
President	--	linda_williams@company.com		Administrator

Provide a name to your filter in *View Name* and select the columns that has to be displayed in list view, when filter is selected.

## Leads > New Custom view

**Details**

\*View Name:   Set as Default  List in Metrics  Set as Public

**Choose Columns**

Last Name *	Company *	Assigned To *	Email
Phone	None	None	None
None	None		

**Standard Filters**

**Simple Time**

Select a Column :

Select Duration :

Start Date :   
(yyyy-mm-dd)

**Column Selection Menu:**

- None
- None
- Lead Information**
- Salutation
- First Name
- Lead No
- Last Name \*
- Phone
- Company \*
- Mobile**
- Title
- Fax
- Lead Source
- Email
- Industry
- Website
- Annual Revenue
- Lead Status
- No of Employees
- Rating
- Secondary Email

 Mandatory fields should be mapped necessarily

On save you will be able to see filter in action. At this level you can see the list of records in selected columns.

## Leads



### Search

Go to Advanced Search

Search for  In Last Name Search Now

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Showing Records 1 - 2

**Filters :** Test Filter Create Filter | Edit | Delete

Delete Send Mail Mass Edit Send SMS

<input type="checkbox"/>	Last Name	Company	Assigned To	Email	Phone	Action
<input type="checkbox"/>	PratimP	company--	example16			edit   del
<input type="checkbox"/>	Ashok	Test	test			edit   del

Both *Standard Filters* and *Advanced Filters* are used to enhance and refine your filter.

*Standard Filters* refine the search depending upon date intervals or particular period.

The options you will find in <i>Standard Filters</i>	
<i>Select a Column</i>	This picklist allows users to refine search depending upon record <i>Modified Time</i> or <i>Created Time</i> .
<i>Select Duration</i>	This picklist allows users to select time duration in accordance with <i>Select a Column</i> option above.
<i>Start Date and End Date</i>	You can fill these fields manually or if you will select the duration, these fields will be automatically filled.

Standard Filters		Advanced Filters	
<b>Simple Time Filter</b>			
Select a Column :		Leads - Created Time	▼
Select Duration :		Last 60 Days	▼
Start Date :		15-12-2011	 (dd-mm-yyyy)
End Date :		12-02-2012	 (dd-mm-yyyy)

**Advanced Filters** refine the search depending upon lead information.

This block contains three columns. Select desired field name from picklist in first column, set desired relation from picklist in second column and enter one or multiple items in third column manually. Items you enter in third column should be separated with commas.

For example:

**Choose Columns**

Last Name \*  Company \*  Assigned To \*  Email

Phone  Rating  None  None

None

**Standard Filters** | **Advanced Filters**

Advanced Search

[New Group](#)

Rating  equals  active,acquired

[New Condition](#)

[Save](#) [Cancel](#)

On **Save**, listview of items filtered based upon search criteria in **Advanced Filters**.

**Leads**

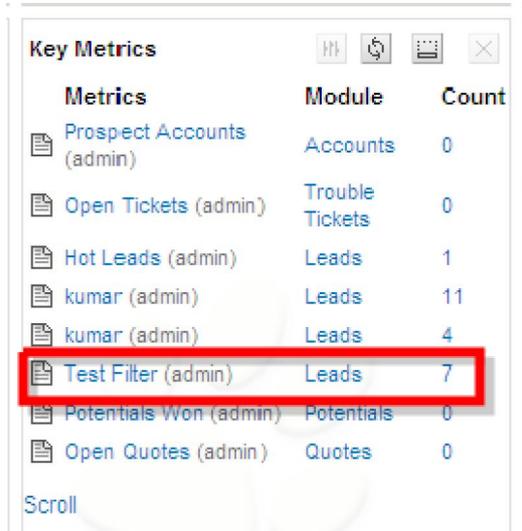
Showing Records 1 - 7      **Filters :** Test Filter      [Create Filter](#) | [Edit](#) | [Delete](#)

[Delete](#)   [Send Mail](#)   [Mass Edit](#)   [Send SMS](#)

<input type="checkbox"/>	Last Name	Company	Assigned To	Email	Phone	Rating	Action
<input type="checkbox"/>	Jones	Route 1 Truck Repair	Kanumuru Sreenivas		909-796-5294	Acquired	<a href="#">edit</a>   <a href="#">del</a>
<input type="checkbox"/>	shaik		Kanumuru Sreenivas	Rehman@gmail.com	45789	Acquired	<a href="#">edit</a>   <a href="#">del</a>
<input type="checkbox"/>	goerge	ABC company	Kanumuru Sreenivas		6486	Active	<a href="#">edit</a>   <a href="#">del</a>
<input type="checkbox"/>	Antony	DCS company	Kanumuru Sreenivas		66656	Acquired	<a href="#">edit</a>   <a href="#">del</a>
<input type="checkbox"/>	Kumar	MS company	Kanumuru Sreenivas			Active	<a href="#">edit</a>   <a href="#">del</a>
<input type="checkbox"/>	Smith	John's Truck Repair	Kanumuru Sreenivas		909-796-5294	Acquired	<a href="#">edit</a>   <a href="#">del</a>
<input type="checkbox"/>	Pandari		Kanumuru Sreenivas			Active	<a href="#">edit</a>   <a href="#">del</a>

### List in Metrics-

This option if enabled, the count and details of the filter will be shown in the **Key Metrics** widget on the Home Page.



Metrics	Module	Count
Prospect Accounts (admin)	Accounts	0
Open Tickets (admin)	Trouble Tickets	0
Hot Leads (admin)	Leads	1
kumar (admin)	Leads	11
kumar (admin)	Leads	4
<b>Test Filter (admin)</b>	<b>Leads</b>	<b>7</b>
Potentials Won (admin)	Potentials	0
Open Quotes (admin)	Quotes	0

### Set as Default-

If this option is enabled, the view will be made default for the users.

### Set as public-

If this option is enabled, every user of CRM, irrespective of role/position can view it. When a user marks a custom filter as public, it should be first approved by admin. It remains in pending state until admin approves it. Admin can see the request under the **Pending** section.