Custom Task Filters Module of Perfex CRM
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Description:

SI Task Filters allows you to create dynamic filters for Tasks in Perfex CRM, This can be used to generate different kind of reporting for your use.

This module is user friendly, quick and easy to install and use.

You can create filters and save them, by your given name, as filter Templates, to use them in future.

This module saves time of user in generating different reports from Task filter because, Once filter is saved as Template, then that template can be used any time, in future.

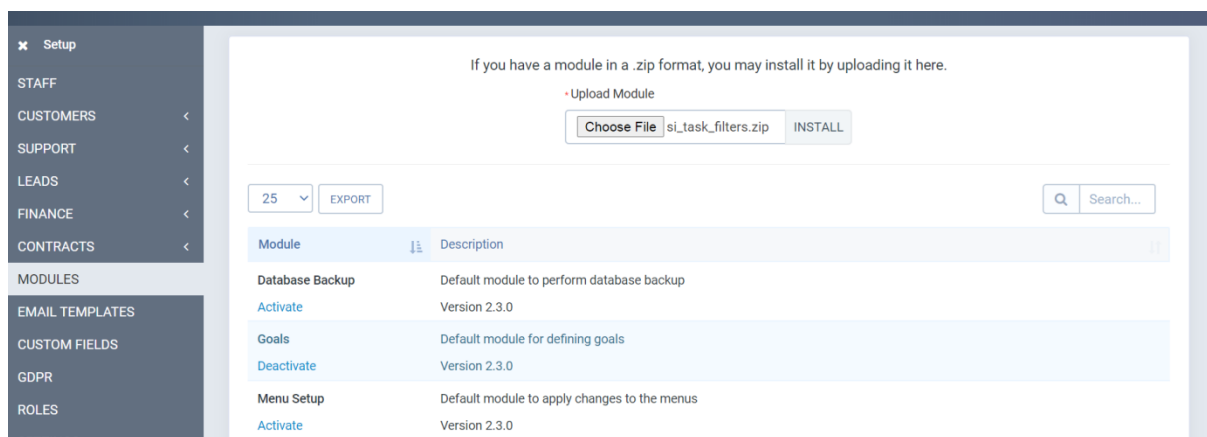Only allowed Staff members can use this Module.

Steps to Use:

1. Quick Install:

You will get si_task_filters.zip file in All files Directory. You can use this zip file to Install this module in Perfex CRM.

Go to Perfex CRM->SETUP-> Modules.

Upload Module zip file and click Install button.

You will be able to see 'SI Task Filters' Module in list of Modules.

Click on Activate it.

That's it.

2. Give rights to Users to access this Module

Admin can give rights to Users or Role who want to allow to use this module.

Click SETUP-> Roles->edit Role, and select Si Task Filters for that role. So all users having that role will be able to use this module.

Check SI Task filters View and Create and save changes.

3. Use from Menu "SI Task Filters"

User will be see this module in Menu called "SI Task Filters", if that user has permission to access this module.

Click on Menu->SI Task Filters->Task Filters, to apply different filters on Task and generate report of it.


If you want to save that Filter for future Use then, Click checkbox in "Save as Filter Template" and add Filter Template Name, then Click on "Filter" Button on top. So this filter will be saved as filter Template and user will be able to access that filter in future.

You can clear and start new filter by clicking "New" Button On the Top.

You can update the status of the task from this filter.

You can switch to kanban view by clicking on "SWITCH TO KANBAN".

User can manage his saved List of Templates, by clicking on Menu-> SI Task Filters->Task Filter Templates.
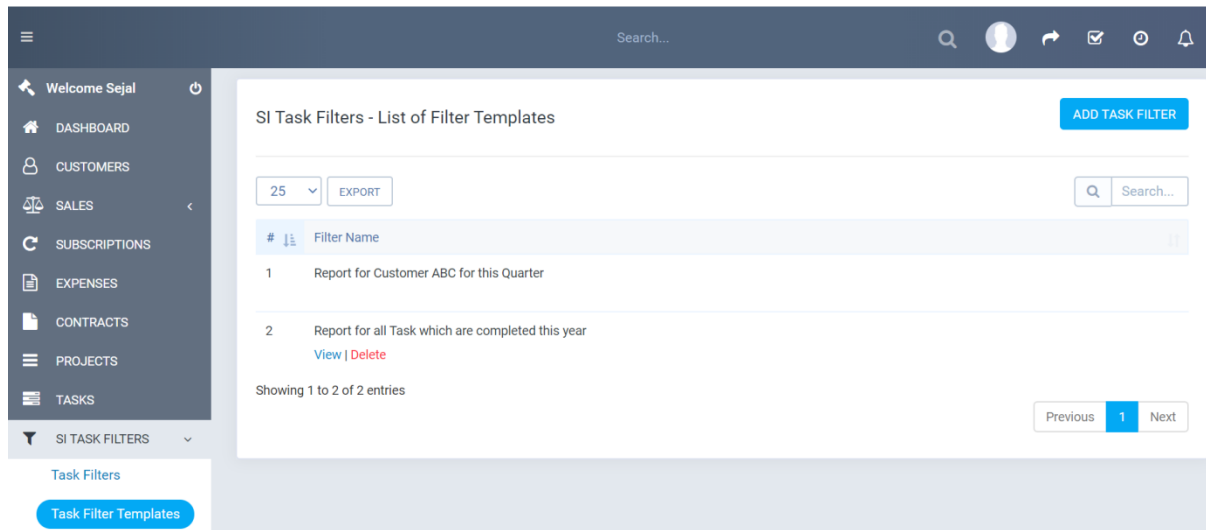
From Task Filter Templates, user can click on View to see all that filtered data Report, so no need to apply filters again, and thus saves time.

4. How to Remove this Module

If you want to remove this module, then Goto SETUP->Modules->SI Task Filters   and click on Deactivate it. So this module will be disable for all.
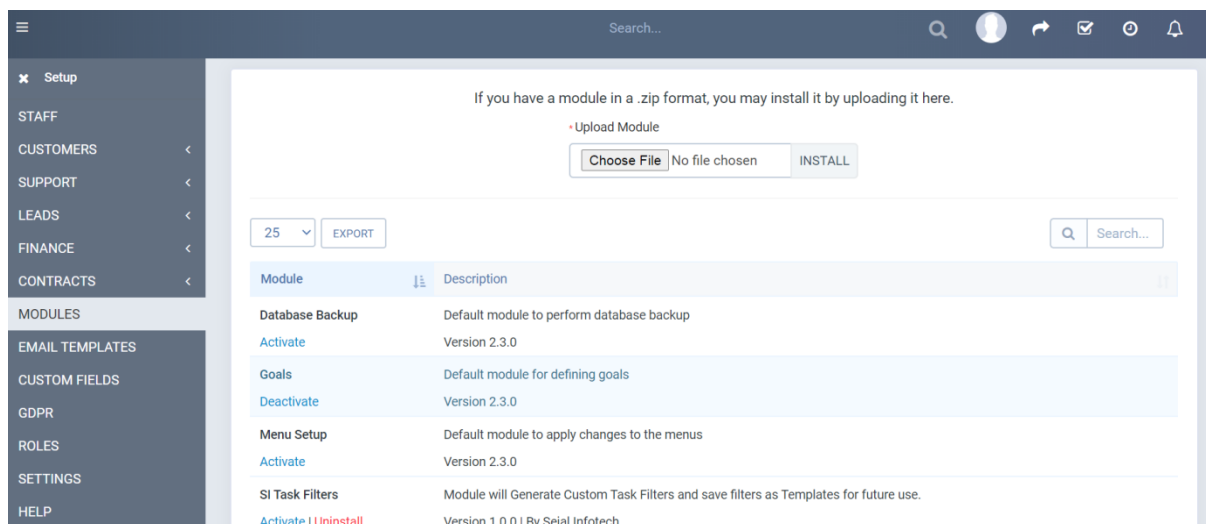
Thanks. I hope you will enjoy using this Module...