



Filter Share

Overview

- Download the latest .tgz package here: <https://github.com/sugarcrlabs/FilterShare/releases/latest>
- Load the package in your target instance using Module Loader
- Navigate to the desired List View
- Create or edit a filter
- You will see a new button labeled "Share"
- You can select any user, team, or group to send the filter to

Share Filter

Create or Edit a filter for a list view. In the edit view there is a button labeled 'Share'.

Opportunities (3)

Create »

Filter ▾ Partner Leads over \$10,000 ✕ Search by opportunity name...

Lead Source ▾

is any of ▾

Partner ✕

- +

Likely ▾

is greater than ▾

\$ (USD) ▾ 10,000.00

- +

Partner Leads over \$10,000

Reset Cancel Delete Save **Share**

| <input type="checkbox"/> | <input type="checkbox"/> | Name | Account Name | Status | Likely | Type | Lead Source | Next Step | Expected Close... | Created By | User | |
|--------------------------|--------------------------|---------------------|---------------------|-------------|-------------|-------------------|-------------|-----------|-------------------|-------------|-------------|--------------------------|
| <input type="checkbox"/> | ☆ | P Piper & Sons ... | P Piper & Sons | In Progress | \$12,097.00 | New Business | Partner | | 2017-12-10 | Will Westin | Will Westin | <input type="checkbox"/> |
| <input type="checkbox"/> | ☆ | Waverly Trading... | Waverly Trading... | In Progress | \$11,004.00 | Existing Business | Partner | | 2017-06-28 | Max Jensen | Max Jensen | <input type="checkbox"/> |
| <input type="checkbox"/> | ☆ | Airline Maintena... | Airline Maintena... | In Progress | \$12,134.00 | Existing Business | Partner | | 2017-09-11 | Max Jensen | Max Jensen | <input type="checkbox"/> |

Select Share Targets

Select which Team, Group, and/or User(s) to share the filter with.

Share Your "Partner Leads over \$10,000" Filter Cancel Save

Roles

Teams


Users


☐ All

☐ Email Archiving user
 ☐ Sugar Customer Support Portal
 ☐ admin Administrator
 ☐ Charles James
 ☒ Chris Oliver
 ☐ Genie O'Grady
 ☐ Jane Fitzpatrick
 ☐ Jim Brennan
 ☐ Max Jensen
 ☐ Regina Lazlow
 ☐ Sally Bronsen
 ☐ Sarah Smith
 ☒ Will Westin

Shared Filter

Target User(s) will then have that filter available to them.


Accounts
Contacts
Opportunities
Leads
Calendar
Reports
Quotes
Documents
Emails
Campaigns
Calls
Meetings
Tasks
Notes
Forecasts
Cases
Targets

Search
0


Opportunities (3)
Create
Help Dashboard
Create

Filter
Partner Leads over \$10,000
Search by opportunity name...

| | Name | Account Name | Status | Likely | Type | Lead Source | Next Step | Expected Close... | Created By | User | |
|----------------------------|---------------------|---------------------|-------------|--------|-------------------|-------------|-----------|-------------------|-------------|-------------|---|
| <input type="checkbox"/> ☆ | P Piper & Sons ... | P Piper & Sons | In Progress | | New Business | Partner | | 2017-12-10 | Will Westin | Will Westin | ▼ |
| <input type="checkbox"/> ☆ | Waverly Trading... | Waverly Trading... | In Progress | | Existing Business | Partner | | 2017-06-28 | Max Jensen | Max Jensen | ▼ |
| <input type="checkbox"/> ☆ | Airline Maintena... | Airline Maintena... | In Progress | | Existing Business | Partner | | 2017-09-11 | Max Jensen | Max Jensen | ▼ |

List View Help

The Opportunities module allows you to track individual sales and the line items belonging to those sales from start to finish. Each Opportunity record represents a header for a group of Revenue Line Items as well as relating to other important records such as Quotes, Contacts, etc. Each Revenue Line Item is the prospective sale of a particular product and includes relevant sale data. Each Revenue Line Item will typically progress through several Sales Stages until it is marked either "Closed Won" or "Closed Lost". The Opportunity record reflects the amount and expected close date of its Revenue Line Items. Opportunities and Revenue Line Items can be leveraged even further by using Sugar's Forecasting module to understand and predict sales trends as well as focus work to achieve sales quotas.