

The Easy Way to Find your Projects - Filtering in KBBConnect

Filtering can help you group or find specific jobs in your KBBConnect main Projects View.

Figure 1 shows the Project view without a filter. If you have many projects, trying to find a specific job manually can take time, especially without the reference or customer reference. It is therefore possible to use a filter on a variety of fields to narrow down the number of projects on the screen, helping you find the records you need faster.

Quote	Job Status	Date Created	Job Reference	Client Name	Cust Reference	Project Contact Name/Site contact	Address1	Town/City	Supplier	Range
Open Quote	Sold	30/01/2018	1264		Smeeth		No 1 Woodstock ...	Ascot		
Open Quote	Sold	01/11/2017	1259/REV01	Top Notch Kitchens & Bathrooms ...	Palmer		The White Cottage	Bracknell		
Open Quote	Sold	27/10/2017	1258	Top Notch Kitchens & Bathrooms ...	Tassi					
Open Quote	Sold	13/10/2017	1256/REV01	Top Notch Kitchens & Bathrooms ...	Rowe		Woodstock			
Open Quote	Sold	10/10/2017	1125/amazonas	Top Notch Kitchens & Bathrooms ...	Boon		5 Sheraton Way, ...			
Open Quote	Sold	10/08/2017	1246/balabaster	Top Notch Kitchens & Bathrooms ...	Pearce		1, The Avenue	Kent	White	
Open Quote	Sold	21/07/2017	CJ1234/REV01	Top Notch Kitchens & Bathrooms ...	Barton		1 The Bungalow	Bracknell		
Open Quote	Sold	16/06/2017	1220/marpatt doo...	Top Notch Kitchens & Bathrooms ...	Mrs Pearce					
Open Quote	Sold	12/05/2017	1126/rev1	Top Notch Kitchens & Bathrooms ...	Bartram		Herts Green			In Line Painted

Figure 1: Projects View

Creating a filter

- To create a filter, click the **Filter** button from the Tasks Menu (Figure 2) in the **Projects** view. This will display a filter window as shown in Figure 3.

Figure 2: Tasks Menu

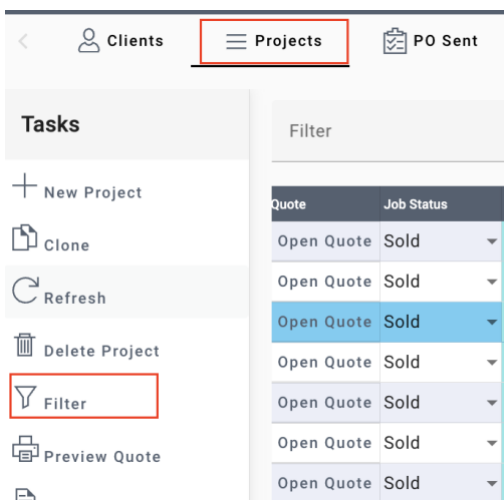


Figure 3: Filter Window

Filter Projects

Field*
Cust Reference

Condition*
contains

Value
Palmer

Add

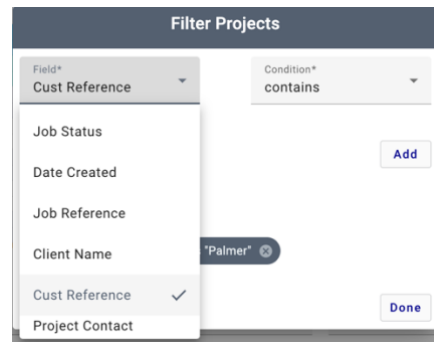
✓ Cust Reference contains "Palmer" ✕

Done

- The **Field** (Figure4) displays a drop-down list. This enables you to search the Projects view by Job Ref, Customer Ref, Salesman Name, etc.

In the following example Cust Reference is selected (represents the Customer Reference field in the projects list).

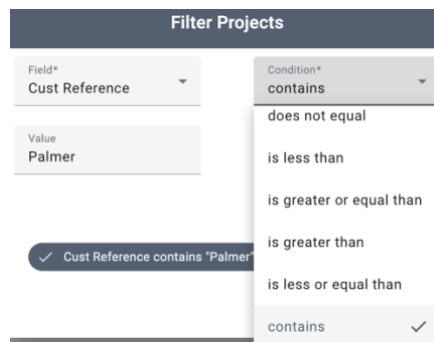
Figure 2: Field Column



- Similar to the Field header, the **Condition header** (Figure 5) displays a drop-down menu when one of its cells is selected.

Condition refers to the search condition of the filter. It means how the filter will search.

Figure 3: Condition Column



The table below shows a full list of conditions and their definitions.

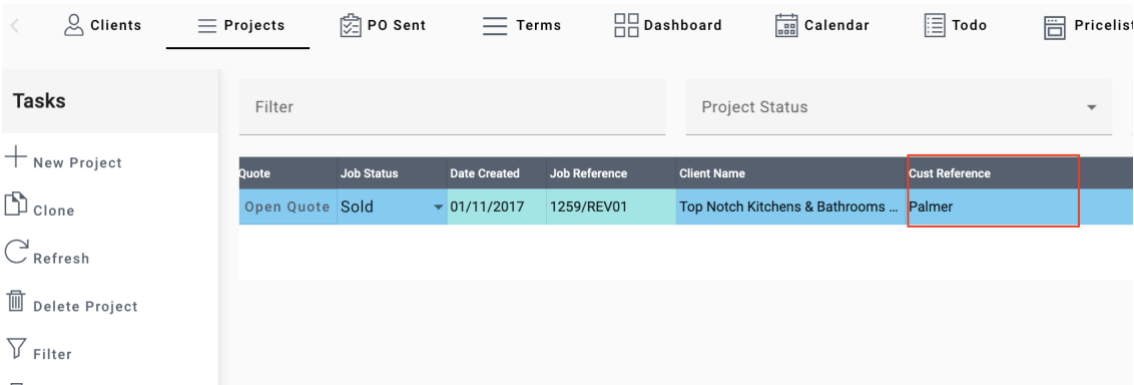
Condition	What this means
=	Equal to
>	Is greater than
<	Is less than
>=	Greater than or equal to
<=	less than or equal to
<>	Is not equal to
is	is equal to
is not	Is not equal to
containing	Contains the following phrase

- Cells in the Value column contain the string (phrase), date or number that you wish to search for.

The example filter shown will search the current projects list for any projects containing 'Palmer' as the Cust reference (the Cust Reference field on the Projects view).

To apply the criteria, click the **Add** button and **Done**.

- Figure 6 shows the project list after the filter has been applied.



Quote	Job Status	Date Created	Job Reference	Client Name	Cust Reference
Open Quote	Sold	01/11/2017	1259/REV01	Top Notch Kitchens & Bathrooms ...	Palmer

Figure 6: Post-Filter Projects View

- To add a new filter, select new selection and Click the **Add** button again.
- To delete/clear click on the cross next to each selection and Done (Figure 7).

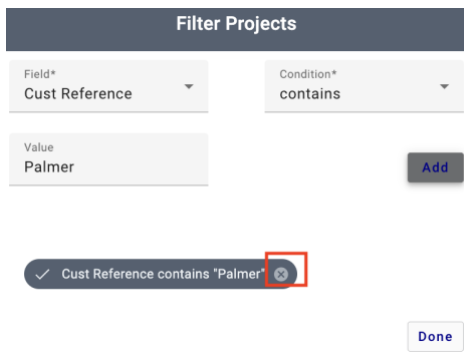


Figure 7: Delete/Clear Filter

- Alternatively, there is a **Filter** in toolbar above the project list. Done (Figure 8).

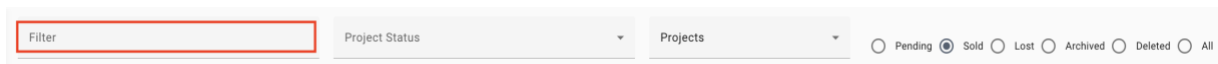


Figure 8: Quick Filter

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OR

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