



System Filter Overview

Megan De Freitas - 2024-11-22 - Setup

The System Filter form in SalesPad Mobile allows administrator users to add filtering capabilities to different objects that are sent to the mobile client device.

Navigate to the Security Editor and click the *System Filter Editor* box in the grid list of enabled forms.

The screenshot shows the 'Security Editor' window. On the left, there's a 'System Users' list with columns 'User N...' and 'Security...'. The main area is titled 'Group Security' and contains a 'Security Group' dropdown set to 'Admin'. Below this is a grid of 'Enabled' forms. The 'System Filter Editor' form is highlighted in blue. Other forms in the list include Access Security*, Application Settings, Database Update*, Email Template Editor, Fields*, Grid Reports*, Mobile License Manager*, Mobile Server, Report Manager, Security Editor, TEST FORM, Update Manager, User Email Accounts, and User Field Editor. All forms have a checked checkbox in the 'Enabled' column.

Navigating System Filter Types

System Filters come in three forms: Global, Group and User. The functionality of each is explained below:

Global Filters

Global filters apply to every user. They are primarily used to hide sensitive information, such as Item Cost, from the mobile client.

Group Filters

Group filters apply to every user inside a group. They are the most widely-used filters, as they apply to organization-wide groupings. For example, a group might have a filter stating they can only access sales documents that have their login under sales representative.

User Filters

User filters apply to individual users. They are primarily used as an alternative to applying a filter to an entire group, for example in cases where users want to prevent one member of a sales team from seeing certain item types.

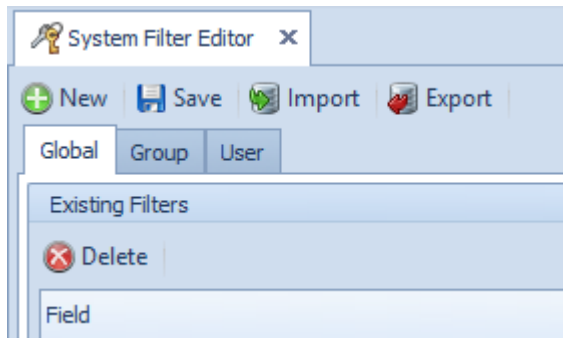
Step 1

Click the **System Filter Editor** icon in the ribbon.



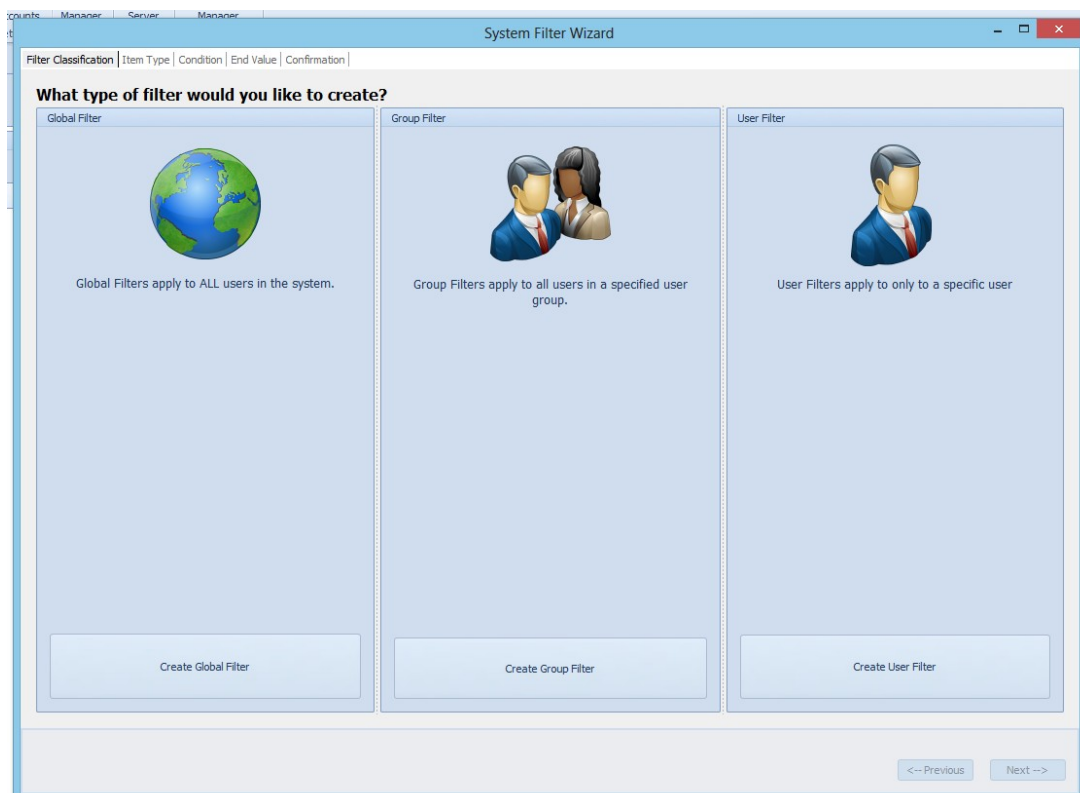
Step 2

Select **New** from the form's header.



Step 3

Create a type of System Filter (Global, Group, or User).



Step 3.A

Select a group to apply the filter to.

Accounts Manager Server Manager

System Filter Wizard

Filter Classification | **Select Group** | Item Type | Condition | End Value | Confirmation

Select the System Group that this filter will be applied to:

Security Group
Admin

<-- Previous Next -->

Step 3.B

Select a user to apply the filter to.

Accounts Manager Server Manager

System Filter Wizard

Filter Classification | **Select User** | Item Type | Condition | End Value | Confirmation

Select the System User that this filter will be applied to:

User Name	Security Group
sa	Admin
salespad	Admin
sas	Admin

<-- Previous Next -->

Step 4

Select an object and field to apply the filter to.

System Filter Wizard

Filter Classification | Item Type | Condition | End Value | Confirmation

Select the System Item and corresponding Item Field this filter will apply to

System Item	Field
ActiveUser	App_Path
Address	App_Version
CRMNote	Company
Currency	Last_Ping_Time
Customer	Last_Update
CustomerAR	Log_In_Time
CustomerARMeasure	Machine_Name
CustomerClass	Product
CustomerDiscountDetail	Row_ID
CustomerLineItem	Session_Key
CustomerYTD	User_Name
Email	
EmailAddresseeDefinition	
EmailTemplate	
Encryption	
GPIItemPrice	
InventoryLookup	
ItemMaster	
ItemPrice	
LicenseActivation	
LicenseActivationAlias	
LicenseSoftwareModule	
LicenseSoftwareModuleDetail	
Location	
OfflineOrderEntryMap	
OfflineUser	
PaymentTerm	
Phone	
PriceLevel	
PurchaseLineItem	
PurchaseLineSearch	

<-- Previous Next -->

Step 5

Select how you want items to be filtered.

System Filter Wizard

Filter Classification | Item Type | Condition | End Value | Confirmation

Condition	Operator	Description
Equals	=	Item A equals Item B
Not Equal	<>	Item A is NOT equal to Item B
Greater Than	>	Item A is greater than Item B
Greater Than...	>=	Item A is greater than or equal to Item B
Less Than	<	Item A is less than Item B
Less Than or ...	<=	Item A is less than or equal to Item B
Like	LIKE	Item A is contained in Item B
Not Like	NOT LIKE	Item A does NOT contain Item B

Select the condition that you would like the filter to use

The condition will determine how items are filtered.

<-- Previous Next -->

You can select the following conditions for the filter to use:

Equals - This will force only objects that have a column equal to the end value to be shown.

Not Equal - This will force only objects that don't have a column equal to the end value to be shown.

Greater Than - This will force only objects that have a column greater than the end value to be shown.

Greater Than or Equal To - This will force only objects that have a column greater than or equal to the end value to be shown.

Less Than - This will force only objects that have a column less than the end value to be shown.

Less Than or Equal To - This will force only objects that have a column less than or equal to the end value to be shown.

Like - This will force only objects with a column that contains the end value to be shown.

Not Like - This will force only objects with a column that doesn't contain the end value to be shown.

Step 6

Select what the end value will be between a custom value and a user- or group-specific value.

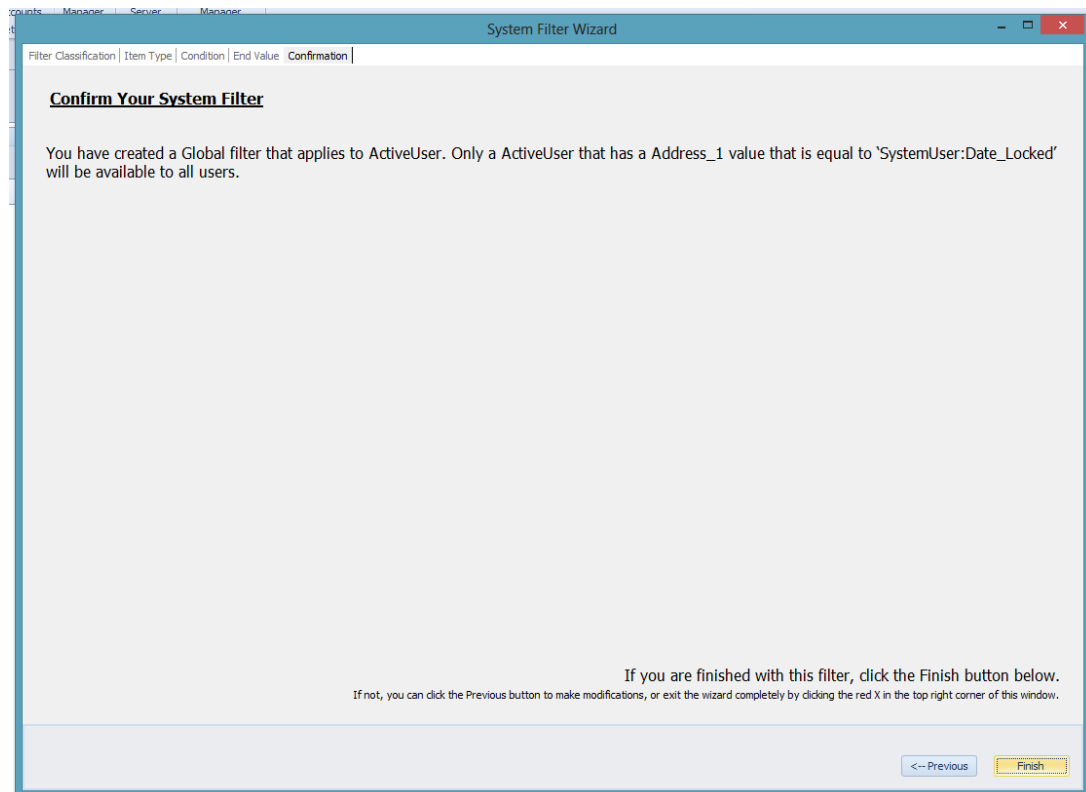
A custom value will apply the filter to only the value entered. Use this in instances where you don't have a matching System User or System Group end value to work from.

A user or group specific value will apply the filter to the currently logged in mobile user's corresponding table.

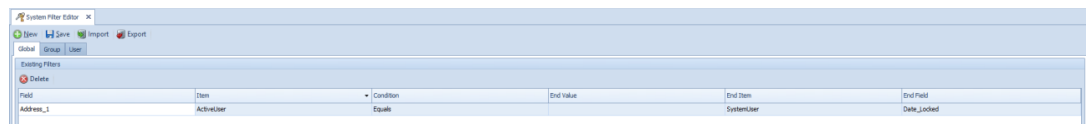
The screenshot shows the 'System Filter Wizard' dialog box, specifically the 'End Value' tab. The title bar reads 'System Filter Wizard'. The tab bar at the top includes 'Filter Classification', 'Item Type', 'Condition', 'End Value' (selected), and 'Confirmation'. The main content area is titled 'Would you like to enter a custom value, or select a field from a system item?'. Below this title are two radio buttons: 'Enter a custom value' (unselected) and 'Select an Item and Field' (selected). Under the 'Enter a custom value' option is a text input field labeled 'Custom Value:'. Under the 'Select an Item and Field' option, there are two list boxes. The left list box is titled 'System Item' and contains three items: 'System User' and 'System Group' (both selected with blue highlights), and 'System Item' (unselected). The right list box is titled 'Field' and contains a long list of fields: 'Date_Locked', 'Display_Name', 'Email', 'Locked', 'Password', 'Password_Updated', 'Previous_Password_1', 'Previous_Password_2', 'Previous_Password_3', 'Previous_Password_4', 'Previous_Salt_1', 'Previous_Salt_2', 'Previous_Salt_3', 'Previous_Salt_4', 'Reset_Password_Next_Login', 'Salt', 'Security_Group', and 'User_Name'. At the bottom right of the dialog box are two buttons: '<-- Previous' and 'Next -->'. The background of the window shows a blurred view of a system interface with tabs for 'Accounts', 'Manager', 'Server', and 'Manager'.

Step 7

This page will confirm as best it can what the system filter will do to the table. Clicking **Finish** will save the System Filter for later use.



Interpreting Existing System Filters



Each existing system filter is explained below:

Field Column

Represents the column being filtered.

Item Column

Represents the object being filtered.

Condition

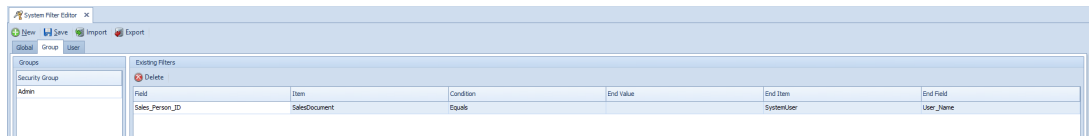
Represents how the end value applies to the Field and Item.

End Value or End Item/End Field

Represents what the Field and Item apply to.

Filter Target

Represents what group the filter applies to. In the Group tab, this is the name of the group. Likewise, in the User tab, this is the name of the user.



Below are solutions to two potential problems:

The filter does the exact opposite of what I expected it to do.

The quickest way to evaluate how the filter is working is to read the confirmation page when you make the system filter. It tries to describe as verbose as possible what the system filter will do to associated queries.

The filter locked me out of the system.

This can occur if filters are applied to SalesPad system tables. The easiest way to fix this issue is to delete the culprit row in the database's SPGPM.SystemFilter table.