Knowledgebase > SalesPad Mobile > Setup > System Filter Overview

# **System Filter Overview**

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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.

R Securi	ty Editor 🗙						
Close	📙 Save						
System Users		Group Security					
🔁 New	**	😌 New 🛛 🔕 Delete	Security	r: 📄 Copy Security 🛛 🐒 Enable All Settings 📄 Disable All Settings 🛛 📽 Enable All Sub Settings 📄 Disable All Sub Settings			
User N	Securit	Security Group	Enabled	Plugin Name			
sa	Admin	Admin	V	Access Security*			
salespad	Admin		V	Application Settings			
sas	Admin		V	Database Update*			
			V	Email Template Editor			
				Fields*			
			V	Grid Reports*			
			1	Mobile License Manager*			
			V	Mobile Server			
			V	Report Manager			
			1	Security Editor			
			V	System Filter Editor			
		-	V	TEST FORM			
			V	Update Manager			
			V	User Email Accounts			
			V	User Field Editor			

## 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  ${\bf New}$  from the form's header.

R System Filter Editor							
🔁 N	ew	📙 Save 😡 Impo		Import	rt 🗃 Export		
Global		Group	User				
Exi	isting	) Filters					
8	🔕 Delete						
Fie	d						

# Step 3

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



# Step 3.A

Select a group to apply the filter to.

unts Manager Seguer 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.

ounts Manager Server Manager System	Filter Wizard – 1	□ ×
Filter Classification Select User Item Type Condition End Value Confirmation		
Soloct the System User that this filter will be applied to:		
lier Name	For with Corup	
	Advin	
salesnari	Admin	
sars	Admin	
	F NAME THE F	
	< Previous Ne:	xt>

Step 4

Select an object and field to apply the filter to.

	System Fi	r Wizard	
r Classification Item Type Condition End Value Confirmation			
elect the System Item and correspond	ing Item Field this filter v	ll apply to	
ystem Item	▲ ▲	Field	
ActiveUser		App_Path	
Address		App_Version	
CRMNote		Company	
Currency		.ast_Ping_Time	
Customer		.ast_Update	
CustomerAR		.og_In_Time	
CustomerARMeasure		fachine_Name	
CustomerClass		roduct	
CustomerDiscountDetail		low_ID	
CustomerLineItem		Session_Key	
CustomerYTD		Jser_Name	
Email			
EmailAddresseeDefinition			
EmailTemplate			
Encryption			
GPItemPrice			
inventoryLookup			
ItemMaster			
ItemPrice			
icenseActivation			
icenseActivationAlias			
icenseSoftwareModule			
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		Colored all a second bit on the st
Equals = Item A equals It	Item B	Select the condition that
Not Equal <> Item A is NOT e	equal to Item B	you would like the filter to use
Greater Than > Item A is greater	er than Item B	
Greater Inan >= Item A is greate	er than or equal to Item B	The condition will determine how items are filtered
Less Inan < Item A is less th	nan item B	The condition will determine now items are intered.
Less Inan or <= Item A is less th	han or equal to Item B	
LIKE LIKE Item A is contain		
NOT LIKE NOT LIKE ITEM A does NO	DI contain Item B	
		< Previous Next>

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

 $\ensuremath{\textit{Equals}}$  - 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.

System Filter Wizard								
Filter Classification   Item Type   Condition   End Value   Confirmation								
Would you like to enter a custom value, or select a field from a system item?								
© Enter a custom value © Select an Item and Field								
Custom Value:								
System Item 👻	Field							
System User	Date_Locked							
System Group	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							
	User_Name							
	< Previous Next>							

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**

R system Flar table - x							
Olive Wave Simpet School							
Global Group User							
Existing Filters	Exercise						
S Delete							
Ped Item Condition End Value End Item End Ped							
Address_1 Activitizer Equals Systemitizer Date_Loded							

## 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.