

Setting Filters

Objective: This tip sheet will show you how to set filters in Contract Manager, Partner Opportunity Manager and Quote Manager. In each of the 'Manager' screens, you can enter and set your filter criteria to search for specific data. Setting filters is the recommended best practice when managing many contracts, quotes and opportunities. Filters allow you to search for multiple items which contain similar characteristics (i.e. all contracts with a selected End Customer).

Steps to Set Filters in Contract Manager:

1. Roll over the 'Contracts' tab and click 'Contract Manager' on the secondary menu.
2. On the 'Contracts Manager' screen, click the expand/collapse arrow to display the 'Filters' feature.
3. Click the 'Display' drop down to group contracts by either 'Installed-at Customer and Site ID' or 'Bill to ID'.
4. Once the 'Filters' populate, you can search for contracts based on various filters: 'Installed at Customer Name', 'Bill to ID', 'Installed at Customer and Site ID' 'Contract Number', 'Earliest End Date From/To', and 'Service Level'.

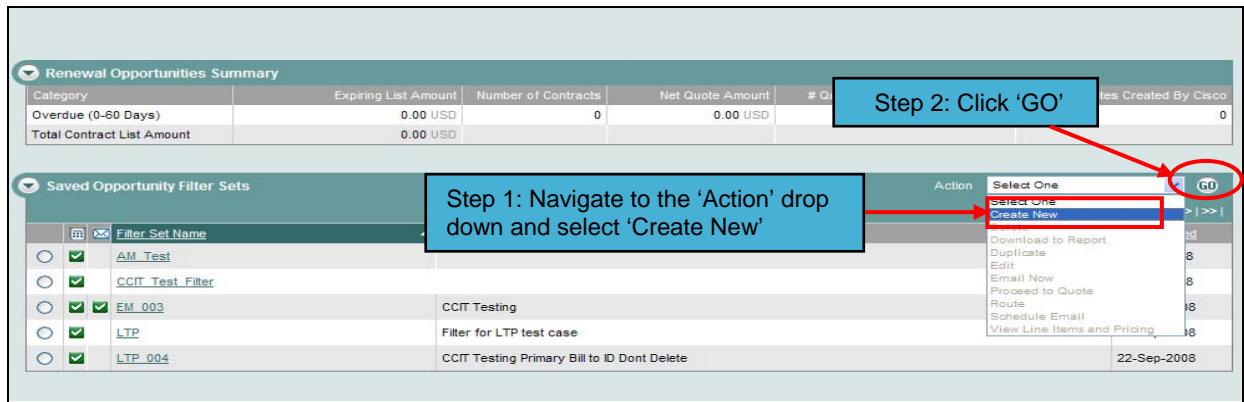
Step 3: Click the 'Display' drop down to group contracts by either 'Installed-at Customer and Site ID' or 'Bill to ID'.

Step 6: Click 'Set Filter'

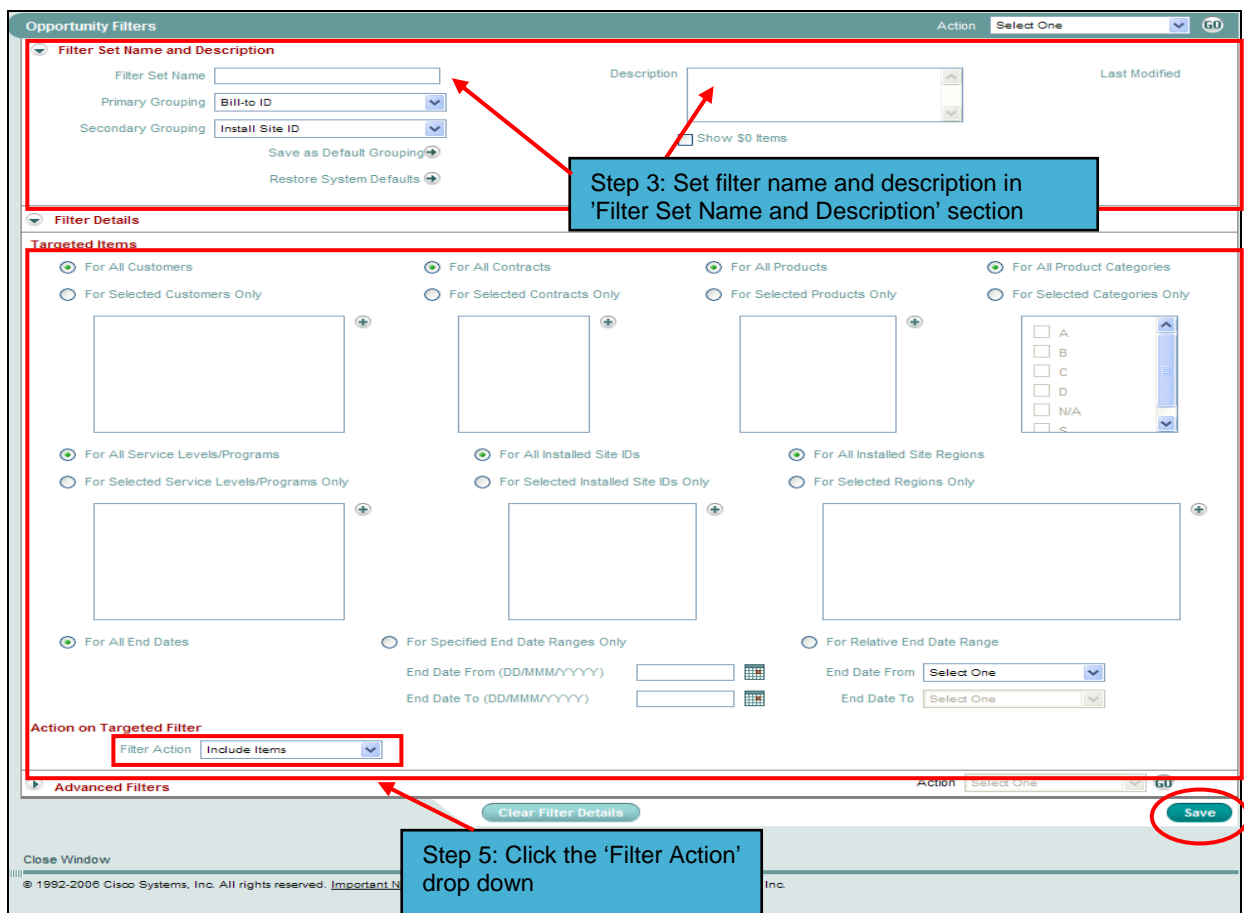
5. Click the pop-up selector icon to search for a specific ID, site, level, and/or region.
6. Click 'Set Filters' to display the results in the 'Contracts Table'
7. After appropriate information is entered, you have the option to set these filters to 'Save as default' 'Restore default' or 'Set Filters'.

Steps to Create a Filter Set in Partner Opportunity Manager:

1. From the Partner Opportunity Manager screen, click the 'Action' drop down menu and select 'Create New'.
2. Click 'GO'.



3. From the Opportunity Filters screen, you can set your filter name in the 'Filter Set Name and Description' section.



4. In the 'Filter Details' section, you can determine the items you want to filter by selecting the radio button(s) next to the appropriate 'For Selected' category. Click the selector of the item to search for and enter specific items in to the given 'For Selected' list.

5. In the 'Action on Targeted Filter' section, click the 'Filter Action' drop down menu and select either 'Include Items' or 'Exclude Items' to include or exclude the specified filters when filtering for your opportunities.
6. Click 'Save'. The filter set will now be saved and can be accessed from the Partner Opportunity Manager Screen

Steps To Create Filter in Quote Manager:

1. Roll over the 'Estimates/Quotes' tab and click 'Quote Manager' on the secondary menu
2. On the 'Quote Manager' screen, click the expand/collapse arrow to display the 'Filters' feature.
3. Once the Filters populate you can search for quotes based on 'Bill To Name' 'Installed at Customer and Site ID' 'Statuses To Include' 'Date Quoted'
4. Click the pop-up selector icon to search for 'Bill To Name' or 'Installed at Customer and Site ID'
5. Click 'Set Filters' to display all Quotes designated under your filters

The screenshot shows the 'Quote Manager' interface. At the top, there is a 'Filters' button with a collapse/expand arrow, highlighted with a red box. A blue callout box points to this button with the text: 'Step 1: On the 'Quote Manager' screen, click the expand/collapse arrow to display the 'Filters' feature.' Below this, the interface displays various search filters: 'Bill To Name', 'Created By', 'Installed-at Customer and Site ID', 'Statuses To Include' (with checkboxes for 'All', 'Confirmation Requested', 'Confirmation Required', and 'Conversion In Progress'), 'Date Quoted' (22-SEP-2008 to 22-OCT-2008), 'Last Modified', and 'Amount Range'. At the bottom right, the 'Set Filters' button is circled in red, with a blue callout box pointing to it that says: 'Step 5: Click 'Set Filters'.' Other buttons at the bottom include '(SCCEA link)', 'Save as Default', and 'Restore Defaults'.

Related Links:

CSCC Training Website: <http://www.cisco.com/web/services/resources/csccltraining/index.html>