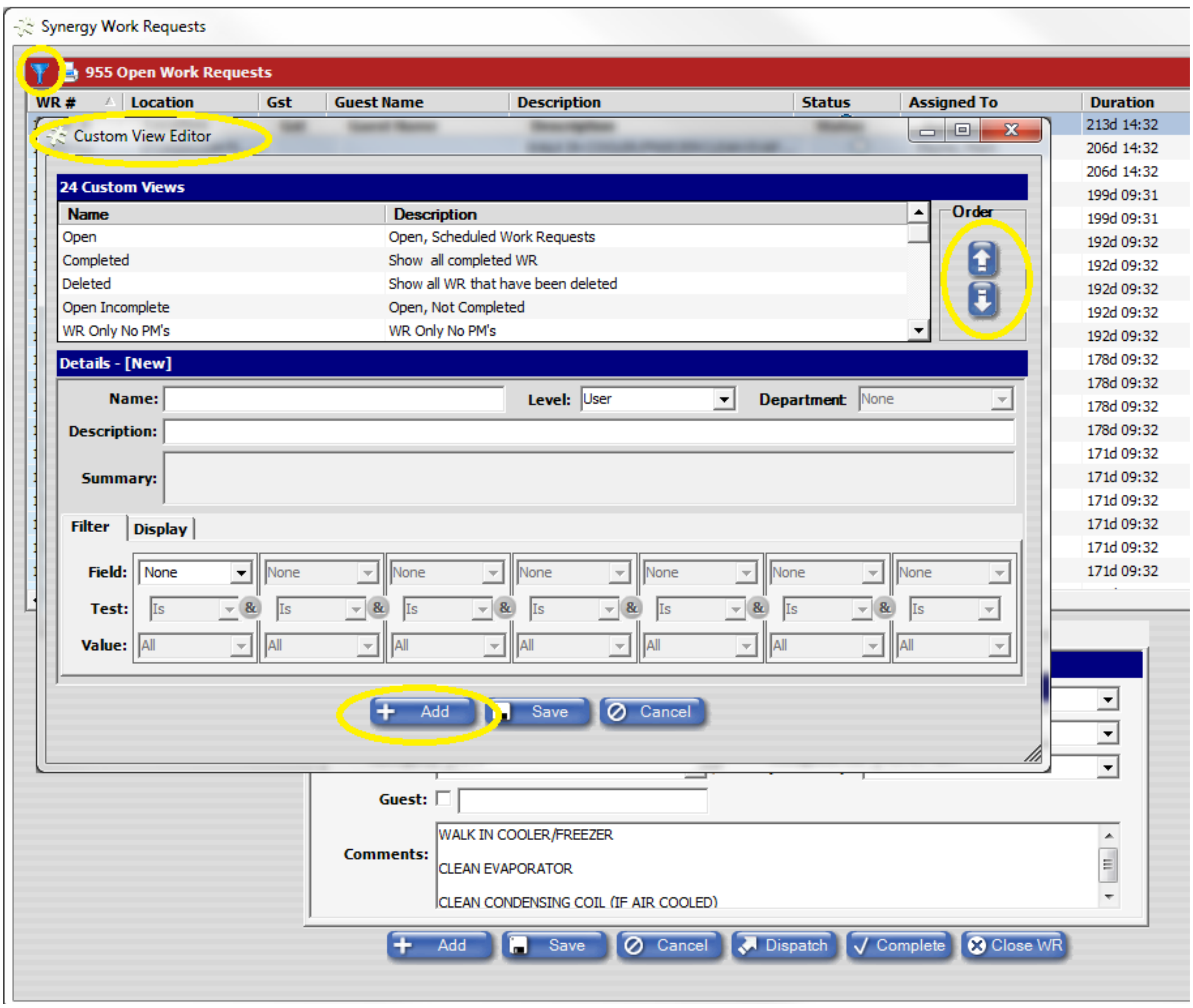
Creating Work Request Custom Views in SynergyMMS

How do I create a custom view in SynergyMMS?

Once in the Work Request (WR) Full View click the blue funnel in the upper left corner. When the menu drops choose the very last one that says Customize query.

Next you will be prompted with the Custom View Editor window (see below).

Click Add to add a new View.



Fill in a new **Custom view name**: This is any name you would like. It is limited to 20 Characters and will be the selectable name to use this view. Try to make this name descriptive for future reference.

Select the **Level** that will be able to access this view:

User – This makes the view only available to you, the person that created it.

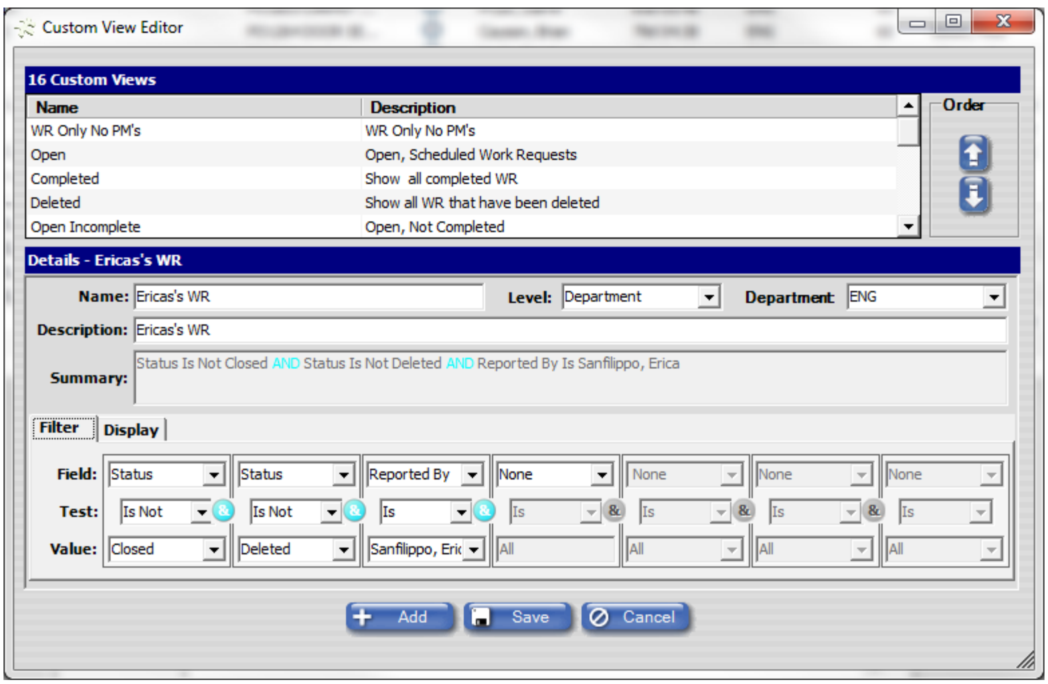
Dept – This makes the view available to all users in the department that is set in the Department drop down **Department**.

Admin – This makes the view available to all users at the property.

Fill in the **Description**; this can be the same as the name, however it allows for 50 characters so it is a bit more descriptive.

Now using the **Filters** drop down in combination with the Test and the Value create the data set you are looking for. See more on this with some examples further down in the document.

Order: This allows each user regardless of if they have rights to create custom views to order their views. This allows a user to reset the primary view for when the Full view is loaded.

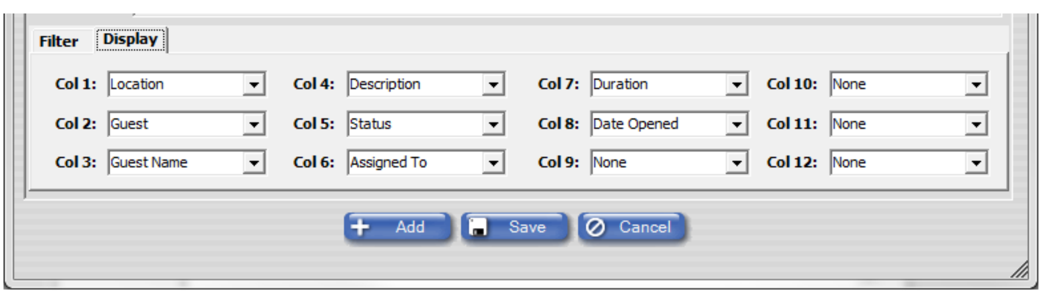


Example: Let's say your job consist of looking at the WR created and not completed that are back of the house for the trade of plumbing.

We can create a custom view showing this data and then you can set this as your first or default View. Each time you now load the WR Full view this would be the data you would see by default, no filtering or anything else.

Note: Your default view is the main one that displays when you load the WR Full View.

Filters: More on filters, Filters consist of the fields available on the work request form, they allow you to set a test of equal, not equal, greater than or less than, and finally set a value you are looking to evaluate.



Display: The Display tab allows you to show whatever data you want in the column headers on the WR Full View. The options are values already used in work request, and a few special ones setup in SynergyMMS.

Examples for creating Custom Views:

1. If you are looking for all WR that are open set the following:
   Filter = Status, Test = not equal, Value = Closed
   Filter = Status, Test = not equal, Value = Deleted

2. If you are looking for WR that are opened today set the following:
   Filter = Date Opened, Test = equal, Value = {Today}

   - Today and Now, are special values for SynergyMMS
   - You can also do {Today-5} for things in the past 5 days.

3. If you are looking for WR created by the logged in user set the following:
   Filter = Reported by, Test = equals, Value {User}
   - {user} is another special value in SynergyMMS

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