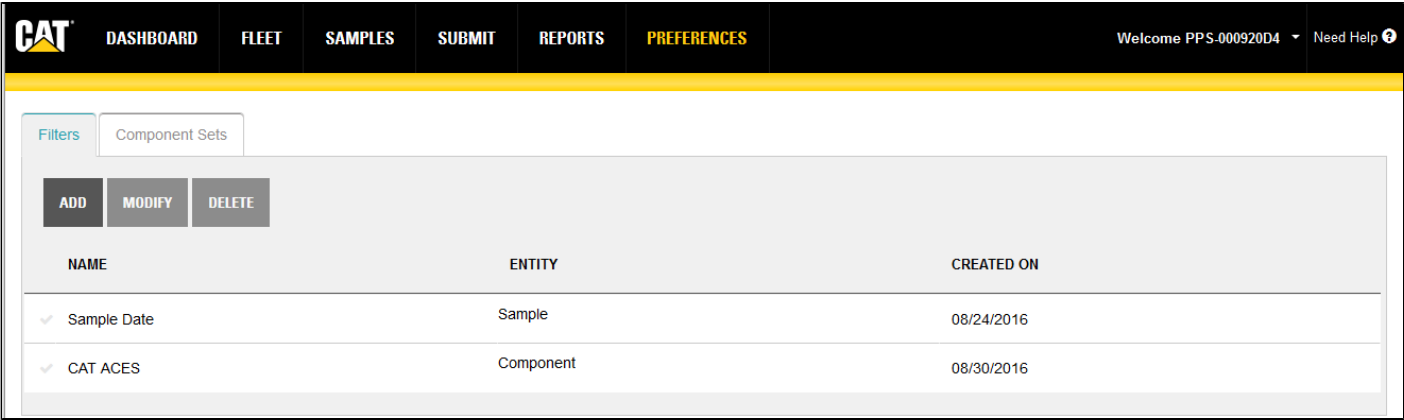# Using the Preferences Page

Use the *Preferences* page to create and manage filters and component sets used within the application. The page includes two tabs—**Filters** and **Component Sets** to facilitate task completion in each area.

Filters Tab Features and Functions

Use the **Filters** tab to create new filters, delete existing filters, and modify conditions and parameters for existing filters.

As the graphic above shows, the tab includes a filters list within a table that also displays the entity and creation date of each filter.

The filters list includes all filters currently used within various pages and processes within the user interface. The specific filters are viewable from pages within the interface related to the entity selected:

- **Asset**—these filters appear in the *Fleet* page **Assets** tab.
- **Component**—these filters appear in the *Fleet* page **Components** tab.
- **Sample**—these filters appear in the *Samples* page.

Adding a New Filter

Click on the **ADD** button to open a dialog box used to create a new filter.

In the **Filter Name** field, enter a descriptive name that will help you identify the filter's intended function. In the example, we use Bedford Assets to identify the target manufacturer and dealer.

Use the **Entity** drop-down list to select whether the filter will target assets, components, or samples.
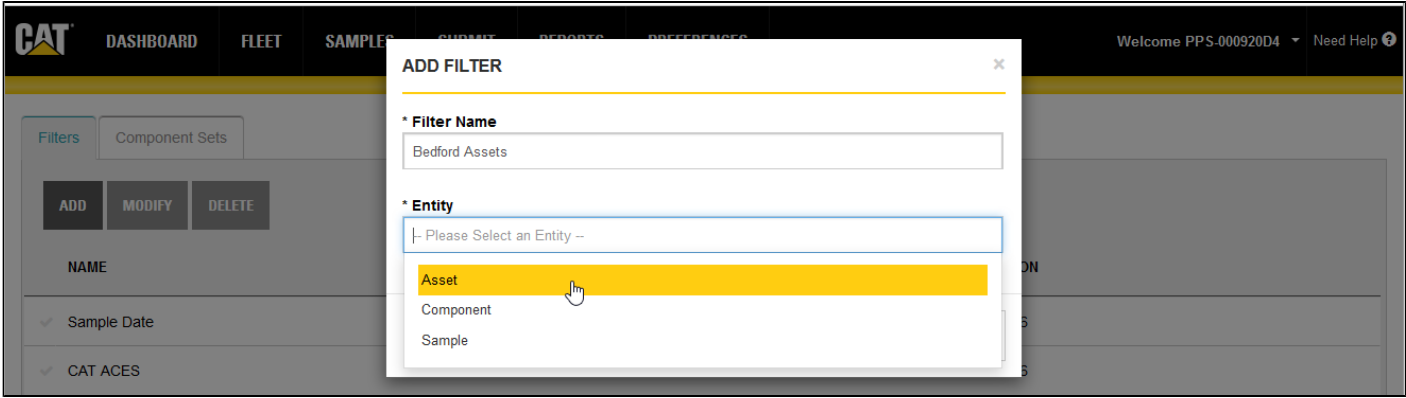
Click on **Add Filter Condition** to add at least one condition. Choose the filter **Property**, **Operator**, and **Value** using the appropriate fields.
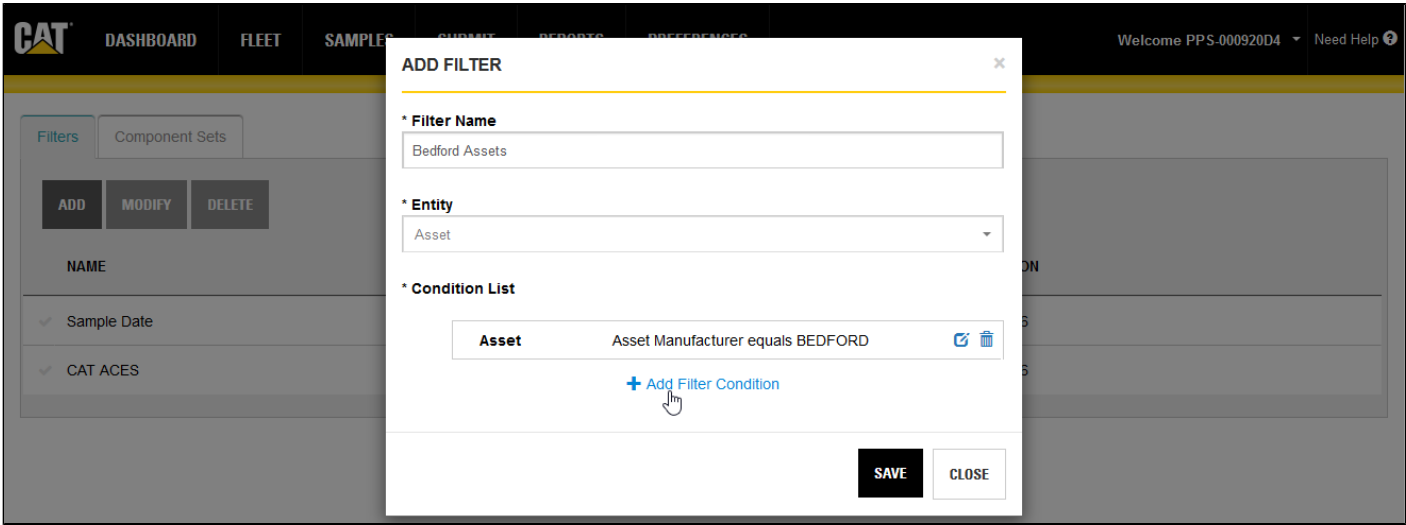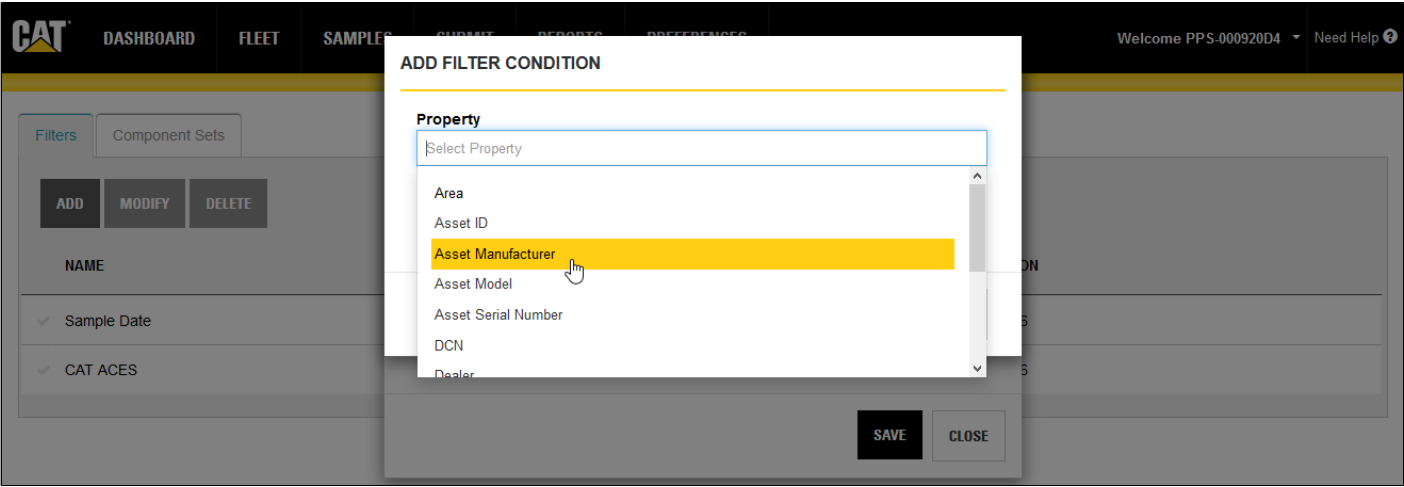

Click on **Add Filter Condition** to add other conditions if needed. Otherwise, click on the **SAVE** button to complete the process and to add the new filter to your list.
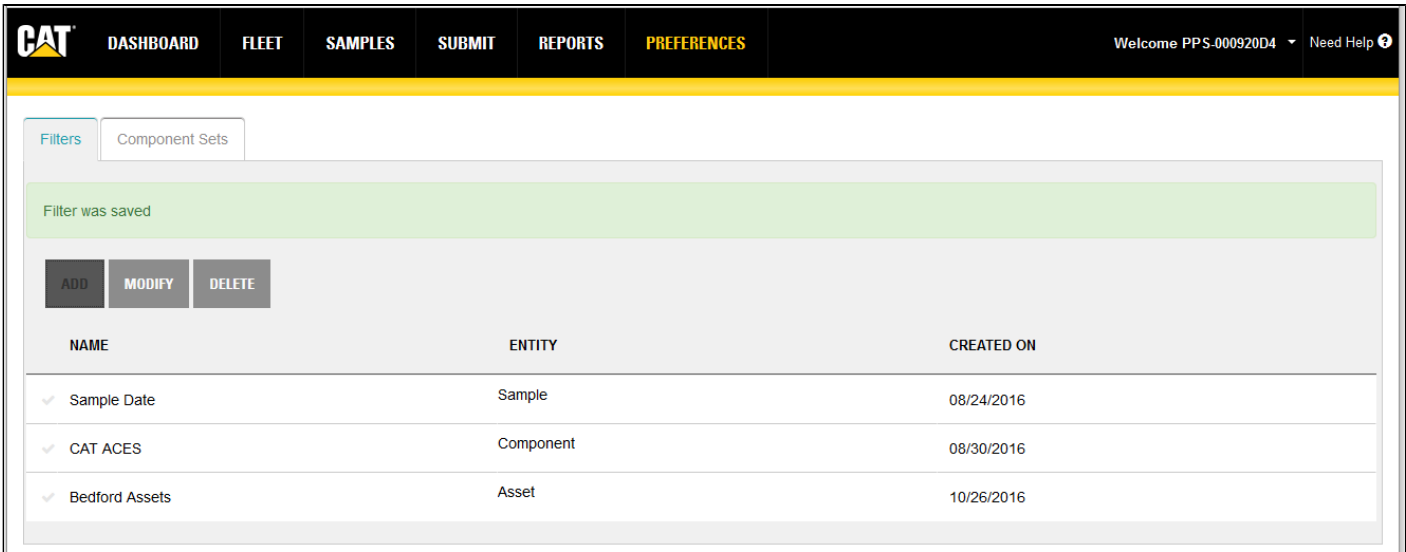
Note that the fields feature drop-down lists for easy selection, or suggest capability that automatically provides a list of

potential matches as you type part of a value in the field.

Alternatively, you can click on the magnifying glass icon to open a lookup dialogs that you can use to locate and select your values.

Depending on the **Operator** selected, you can select multiple values for some conditions by holding down the CTRL key on your keyboard and clicking on each needed value's **Check Mark**.

Modify a filter by clicking on the **Check Mark** next to the filter you need to change then click on the **Modify** button. The *Modify Filter* dialog box opens so you can make changes to filter properties and conditions.

Delete a filter by clicking on the **Check Mark** next to the filter you need to remove from the list then click on the **Delete** button. A confirmation dialog box appears to ensure that you want to delete the selected filter.

Component Sets Tab Features and Functions

Component sets are very useful in situations such as the routine submission of samples for a set of components installed in assets within your fleet.

Use the **Component Sets** tab to create new component sets that will be used to expedite sample submission, or to mananage existing component sets.

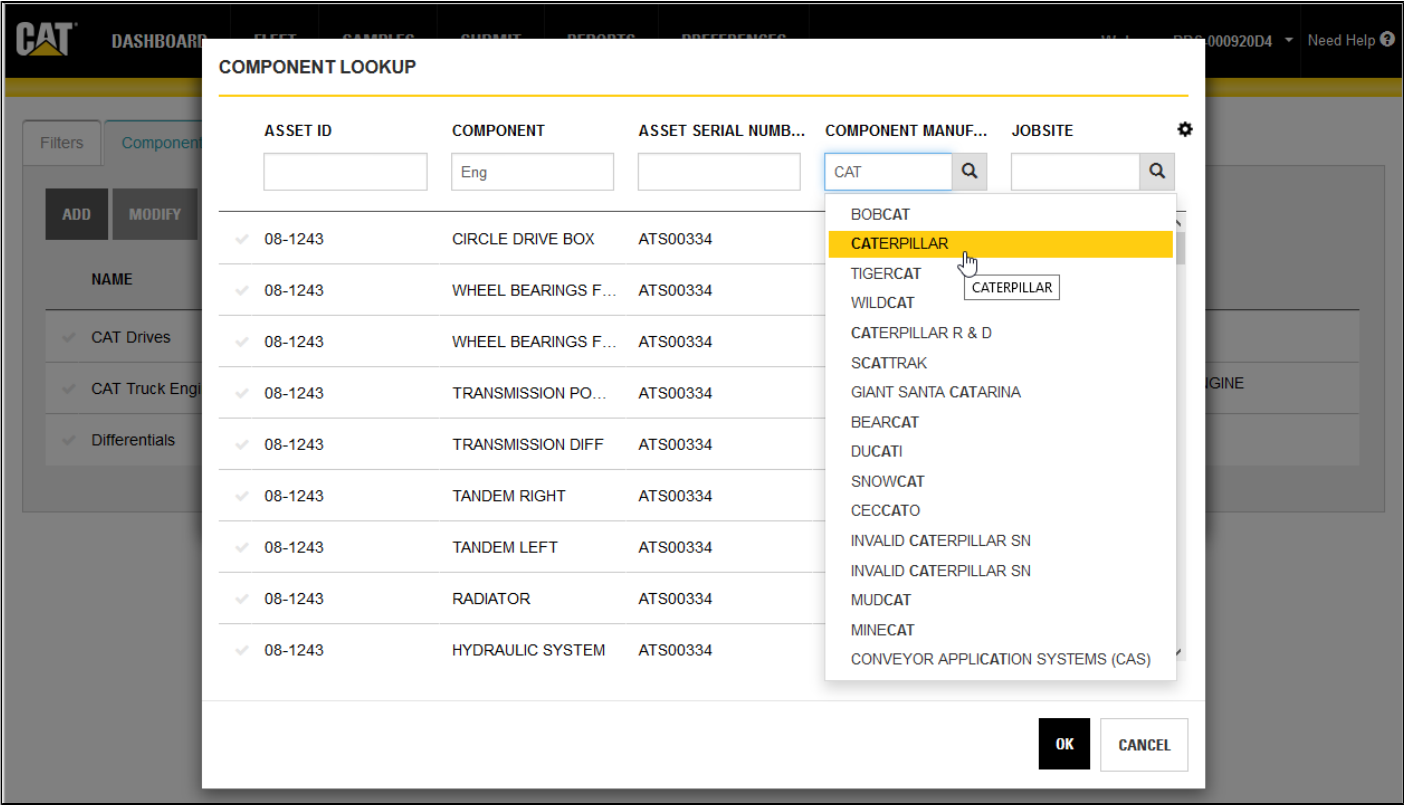Click on the **Add** button to open the *NEW COMPONENT SET* dialog.

Enter a descriptive name in the **Component Set Name** field then click on the magnifying glass icon to open the *COMPONENT LOOKUP* dialog box used to help you locate and select components to add to the set.

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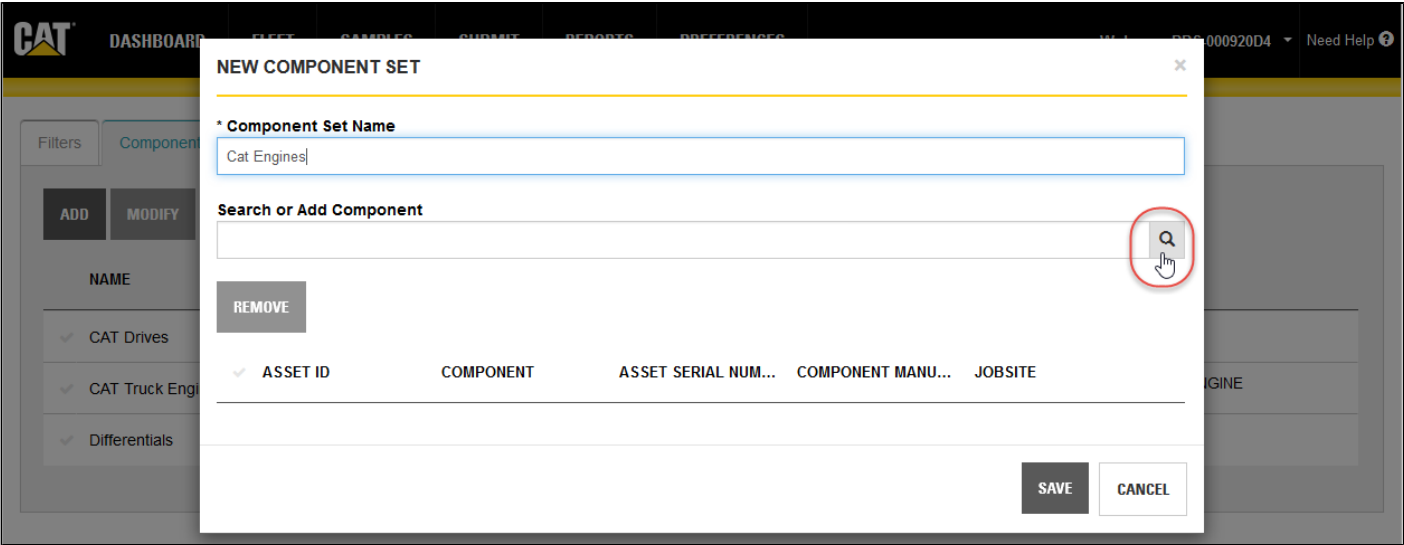
You can type partial values in some filter fields (such as the **COMPONENT** field) below its column header then press Enter on the keyboard to have the table display only components matching the parameters entered.

Some fields have suggest capability (such as the **COMPONENT MANUFACTURER** field) in which a drop-down list is automatically displayed as you enter partial values.

Some fields have a magnifying glass icon attached that will open other lookup dialogs when clicked. Fields that open new lookup dialogs have similar filtering and suggest capability.

Click on the **Check Mark** for each component that you want to add to your set then click on the **OK** button.
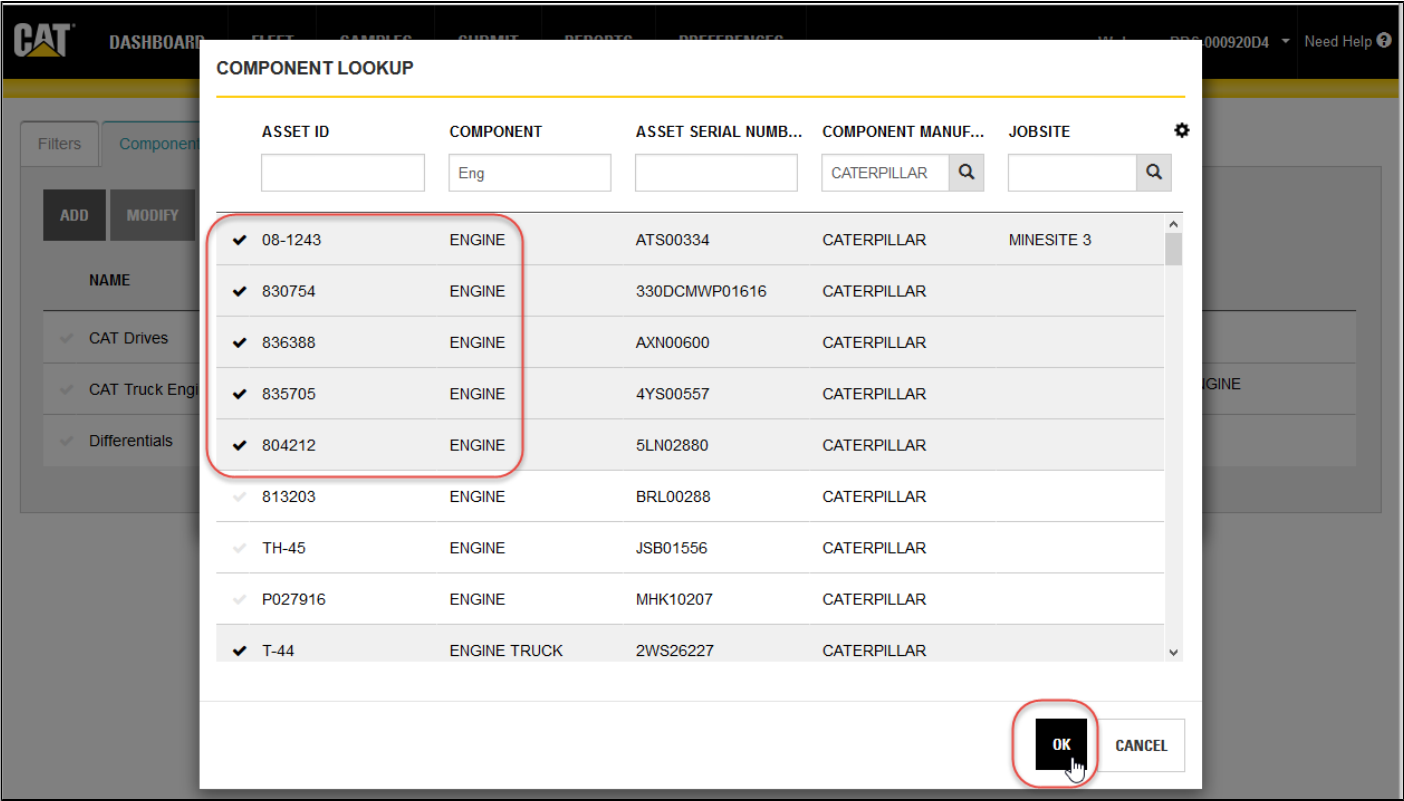
You will return to the *NEW COMPONENT SET* dialog where you can remove components if needed or repeat the process for adding components.
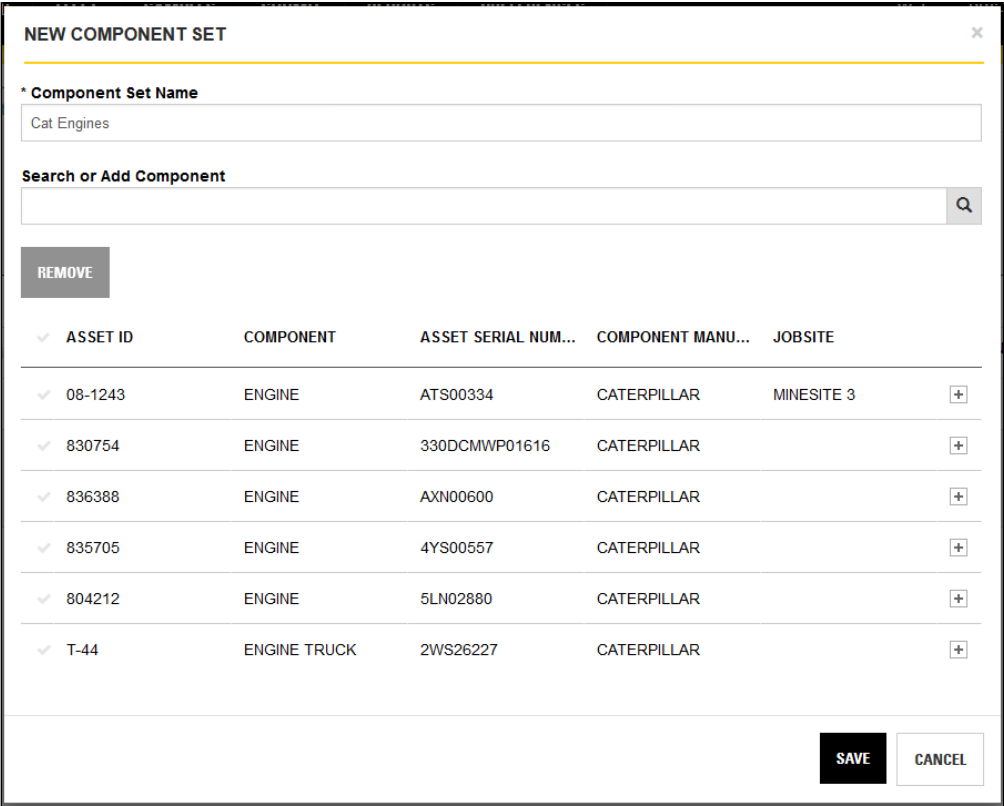
When you are satisfied with your selections, click on **SAVE**. The new set will be added to the components list. From here, you can modify a selected list by clicking on the list's **Check Mark** then the **MODIFY** button.

From the *EDIT COMPONENT SET* dialog box you can change the component set name, and add or remove components as needed.
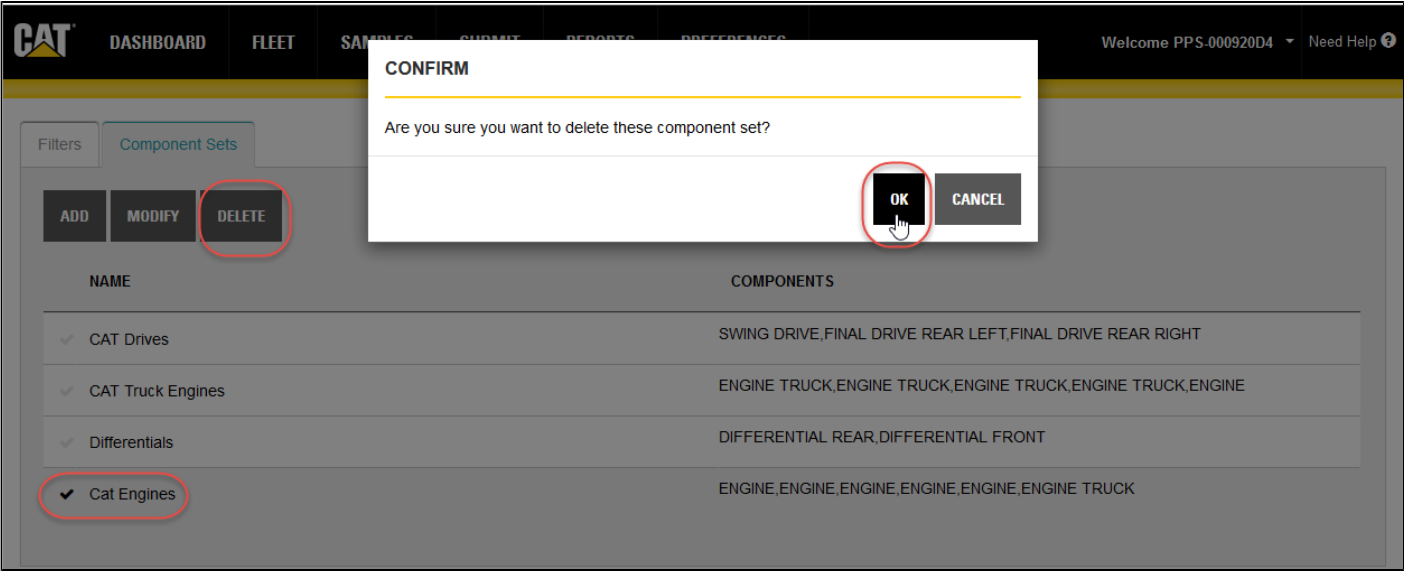

When you save your changes, you will see some of the affected changes in the list.
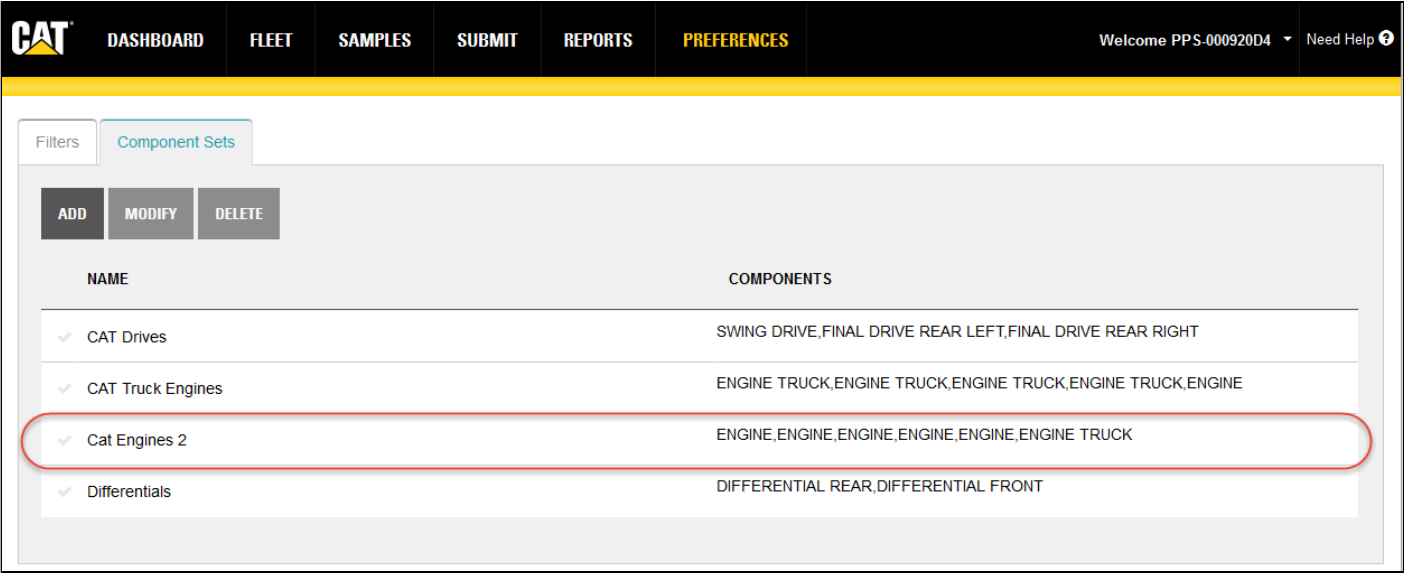
Deleting a component list from the table is simply a matter of clicking on the list's **Check Mark** then clicking on the **DELETE** button.

A confirmation dialog box will appear to ensure that you want to delete the selected list.