



Project Custom View

In addition to the predefined views, users can now create their own custom views for projects. Users can customize projects list view based on specific criteria by applying filters. These custom views can be marked favorite by clicking the ★ icon.

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Create Custom View

	Status	Layout	Created On	Last Modifie...	Created By
Approved	Standard Layout	10/30/2023 01:12 P	10/30/2023 01:12 P	Monica Hemsw	
Approved	Standard Layout	10/27/2023 04:37 F	10/27/2023 04:37 F	Monica Hemsw	
Approved	Standard Layout	10/13/2023 03:55 F	10/13/2023 03:55 F	Sherin Regi Sar	
Approved	Marketing softwar	10/03/2023 06:17 F	10/03/2023 06:17 F	Monica Hemsw	
In Progress	Standard Layout	10/03/2023 05:58 I	10/03/2023 06:00	Monica Hemsw	
Approved	Standard Layout	09/20/2023 06:39	09/20/2023 06:39	Monica Hemsw	
Approved	Standard Layout	09/20/2023 05:05	10/13/2023 04:01 P	Monica Hemsw	
In Progress	Standard Layout	09/12/2023 12:43 A	09/12/2023 12:43 A	Monica Hemsw	
In Progress	Standard Layout	06/28/2023 08:56	11/14/2023 05:59 P	Monica Hemsw	
Approved	Standard Layout	06/26/2023 11:29 A	06/26/2023 11:29 A	Monica Hemsw	
Approved	Standard Layout	05/05/2023 02:36	05/05/2023 02:36	Monica Hemsw	
Approved	Standard Layout	04/18/2023 09:27 F	04/18/2023 09:27 F	Monica Hemsw	
Approved	Marketing	03/07/2023 12:18 P	03/07/2023 12:18 P	Monica Hemsw	
Approved	Standard Layout	02/28/2023 11:49 A	02/28/2023 11:49 A	Monica Hemsw	
Approved	Standard Layout	01/17/2023 07:42 P	01/17/2023 07:42 P	Monica Hemsw	

Total Count: 114 | 25 Records Per Page | 1-25

Feature Availability: User based **Enterprise** plan







Use-cases

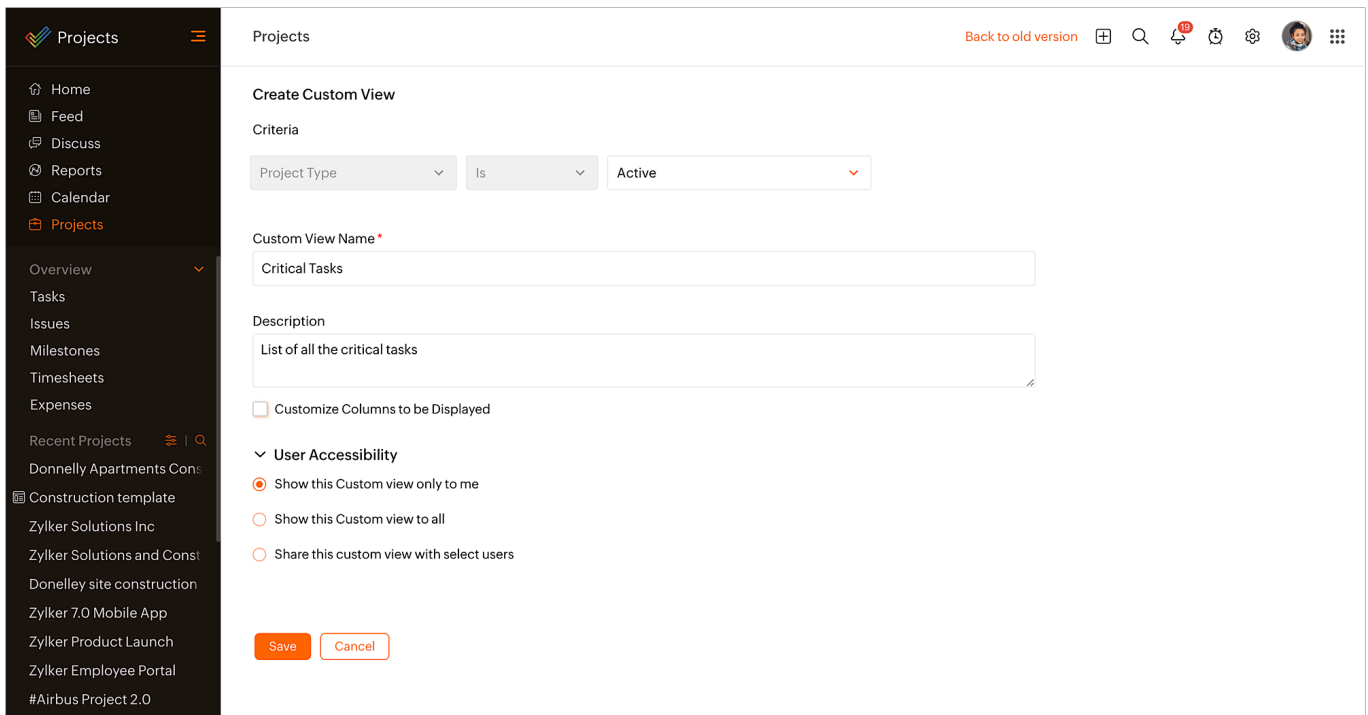
- Marketing:** A marketing firm's admin can create a custom view to list only the projects whose budget is more than \$15000.
- Software development/ IT:** A manager would like to have a separate view to display only the Strict Projects. In this case, the manager can create a custom view.
- Construction:** A construction company owner would like to view all the projects that are getting over this month. This view can be created using the custom view feature.

Benefits

- Use filters to create a view
- Land on the same view with every login
- Mark a view as favorite
- View can be shared with select users, all users, or set for personal use

Create Custom View

1. Click **Projects** in the left navigation panel.
2. Click on the project view drop-down.
3. Select + **Create Custom View**.
4. Select the criteria for your view.
5. Click  to add a criteria and click  to add a group.
 - Click  to delete the criteria.
 - Click  to delete the group.
6. Operators can be used individually or in combination in order to set multiple criteria. There are two types of operators:
 - AND is used when it is mandatory to satisfy all the criteria.
 - OR is used to satisfy an either-or condition.
7. Enter the **Custom View Name**.
8. Enter the *Description* and enable the custom view column if necessary.
9. Select the *Accessibility* and click **Save**.



Projects

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Create Custom View

Criteria

Project Type Is Active

Custom View Name*

Critical Tasks

Description

List of all the critical tasks

☐ Customize Columns to be Displayed

▼ User Accessibility

☒ Show this Custom view only to me

☐ Show this Custom view to all

☐ Share this custom view with select users

Save Cancel

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