

How Advanced Filter works

The **Filter Editor** and **Show Find Panel** options gives the user another way to filter records from a dashboard panel.

- **Filter Editor**

1. On the Dashboard panel, click the **Column Header Menu > Filter Editor** button. This will open the Filter Editor screen.

Date	Customer ID	Company Name	Order Number	Order Total	Amount Due	Paid Status
01/01/2007	C10010	Sort Ascending	SA-10001	\$21,870.63	\$0.00	Yes
01/01/2007	C10009	Sort Descending	SA-10002	\$15,010.00	\$0.00	Yes
01/01/2007	C10014	Columns	SA-10003	\$12,080.52	\$0.00	Yes
01/01/2007	C10015	Group by this field	SA-10004	\$19,200.00	\$0.00	Yes
01/01/2007	C10019	Clear Group By	SA-10005	\$17,852.80	\$0.00	Yes
01/15/2007	C10008	Javel, Inc.	SA-10026	\$1,561.50	\$0.00	Yes
01/15/2007	C10007	SA-10029	SA-10029	\$8,328.15	\$0.00	Yes
01/02/2007	C10002	SA-10008	SA-10008	\$201.00	\$0.00	Yes
02/05/2007	C10001	SA-10015	SA-10015	\$3,452.73	\$0.00	Yes
02/08/2007	C10003	gsmv-10002	gsmv-10002	\$500.00	\$0.00	Yes
02/18/2007	C10000	B&M Designs	SA-10173	\$376.95	\$0.00	Yes
02/20/2007	C10007	L&H Home Collection	SA-10016	\$4,824.63	\$0.00	Yes
02/28/2007	C10010	Master Appliance Company	SA-10011	\$755.46	\$0.00	Yes
03/02/2007	C10009	Kyle Home Appliance Center	SA-10017	\$815.55	\$0.00	Yes
03/15/2007	C10012	HY Fine Furnishings	SA-10019	\$879.55	\$0.00	Yes
03/22/2007	C10010	Master Appliance Company	SA-10018	\$16,818.60	\$0.00	Yes
04/03/2007	C10017	Appliance Direct, Inc.	SA-10020	\$1,653.80	\$0.00	Yes
04/07/2007	C10009	Kyle Home Appliance Center	SA-10021	\$7,517.55	\$0.00	Yes
04/15/2007	C10009	Kyle Home Appliance Center	SA-10166	\$7,328.55	\$0.00	Yes
04/17/2007	C10003	B&M Designs	SA-10062	\$506.91	\$0.00	Yes
			263	\$8,107,118.95	\$659,760.86	

2. Select fields from where you want to filter records from. Select the appropriate **Condition** and enter the **Value**.

Filter Editor [Close] [Maximize]

OK Cancel Apply

Details

Remove

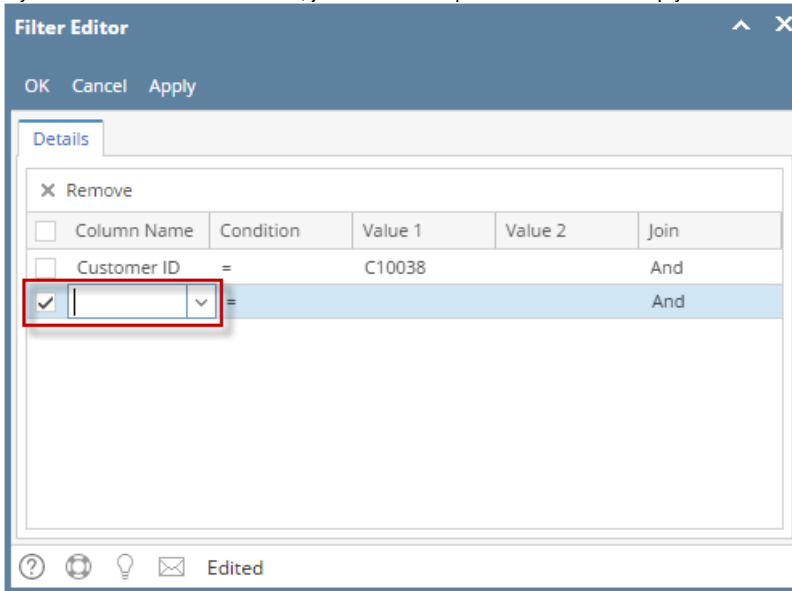
<input type="checkbox"/>	Column Name	Condition	Value 1	Value 2	Join
<input checked="" type="checkbox"/>	Customer ID	=	C10038		And
<input type="checkbox"/>		=			And

Edited

3. Click the **Apply** button to make the filtering criteria take effect without closing the Filter Editor screen. The **Cancel** button will disregard the filtering while the **OK** button will cascade the filtering on the panel display and close the Filter Editor screen.

Date	Customer ID	Company Name	Order Number	Order Total	Amount Due	Paid Status
02/19/2010	C10038	Jay Altstate Appliance	CA10002	\$3,872.35	\$0.00	Yes
06/05/2010	C10038	Jay Altstate Appliance	CA10001	\$17,561.12	\$0.00	Yes
02/09/2011	C10038	Jay Altstate Appliance	CA10003	\$38,309.45	\$0.00	Yes
04/21/2012	C10038	Jay Altstate Appliance	CA10004	\$58,737.20	\$0.00	Yes
			4	\$119,900.72	\$0.00	

- If you would like to add other filter, just click the drop down on the next empty line.



Column fields with filtered criteria has an indicator like shown below.

Customer Invoices Grid	
Date ▲	🔍 Customer ID
02/19/2010	C10038
06/05/2010	C10038
02/09/2011	C10038
04/21/2012	C10038

- Show Find Panel**

- On the Dashboard panel, click the **Column Header Menu > Show Find Panel button**. This will display the **Find field** on top of the column header.

i21 Invoices					
DATE	CUSTOMER ID	NAME	INVOICE NUMBER	INVOICE TOTAL	PAYMENT STATUS
2/26/2014	12	Brown Brother Farms	Sort Ascending	9624000	No
2/26/2014	12	Brown Brother Farms	Sort Descending	336000	No
1/5/2015	12	Brown Brother Farms	Columns	500	No
2/26/2015	12	Brown Brother Farms	Group by this field	7787500	No
2/26/2015	12	Brown Brother Farms	Clear Group By	322000	No
8/26/2015	114	Cedric Noble	Show Find Panel	295.02	No
8/26/2015	116	Tom Smith	Filter Editor	183.75	No
8/27/2015	44	Tanagalakis Farms	SI-3	1350	No
8/31/2015	44	Tanagalakis Farms	SI-4	336	No

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Hide Find:

DATE	CUSTOMER ID	NAME	INVOICE NUMBER	INVOICE TOTAL	PAYMENT STATUS
2/26/2014	12	Brown Brother Farms	SI-66	9624000	No
2/26/2014	12	Brown Brother Farms	SI-67	336000	No
1/5/2015	12	Brown Brother Farms	SI-23	500	No
2/26/2015	12	Brown Brother Farms	SI-62	7787500	No
2/26/2015	12	Brown Brother Farms	SI-65	322000	No
8/26/2015	114	Cedric Noble	SI-1	295.02	No
8/26/2015	116	Tom Smith	SI-2	183.75	No
8/27/2015	44	Tanagalakis Farms	SI-3	1350	No

2. In order to filter the records from the panel, type in the keyword in the **Find** field. The records will be filtered once Enter key is pressed.

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Hide Find:

DATE	CUSTOMER ID	NAME	INVOICE NUMBER	INVOICE TOTAL	PAYMENT STATUS
2/26/2014	12	Brown Brother Farms	SI-66	9624000	No
2/26/2014	12	Brown Brother Farms	SI-67	336000	No
1/5/2015	12	Brown Brother Farms	SI-23	500	No
2/26/2015	12	Brown Brother Farms	SI-62	7787500	No
2/26/2015	12	Brown Brother Farms	SI-65	322000	No
9/8/2015	12	Brown Brother Farms	SI-7	15916.25	No
12/29/2015	12	Brown Brother Farms	SI-32	4000	No
12/29/2015	12	Brown Brother Farms	SI-34	1250	Yes

3. To remove the entered keyword, hit the backspace from keyboard or click the **x** button.

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Hide Find:

DATE	CUSTOMER ID	NAME	INVOICE NUMBER	INVOICE TOTAL	PAYMENT STATUS
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4. To remove the Find field, click the **Hide** button or the **Column Header Menu > Hide Find Panel** button.

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Hide Find:

DATE	CUSTOMER ID	NAME	INVOICE NUMBER	INVOICE TOTAL	PAYMENT STATUS
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Hide Find:

DATE	CUSTOMER ID	NAME	INVOICE NUMBER	INVOICE TOTAL	PAYMENT STATUS
2/26/2014	12	Brown Brother Farms		9624000	No
2/26/2014	12	Brown Brother Farms		336000	No
1/5/2015	12	Brown Brother Farms		500	No
2/26/2015	12	Brown Brother Farms		7787500	No
2/26/2015	12	Brown Brother Farms		322000	No
9/8/2015	12	Brown Brother Farms		15916.25	No
12/29/2015	12	Brown Brother Farms	SI-32	4000	No
12/29/2015	12	Brown Brother Farms	SI-34	1250	Yes