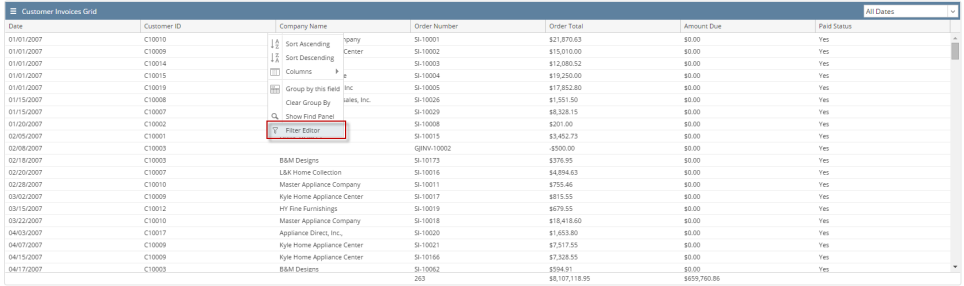


How Advanced Filter works

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

- **Filter Editor**

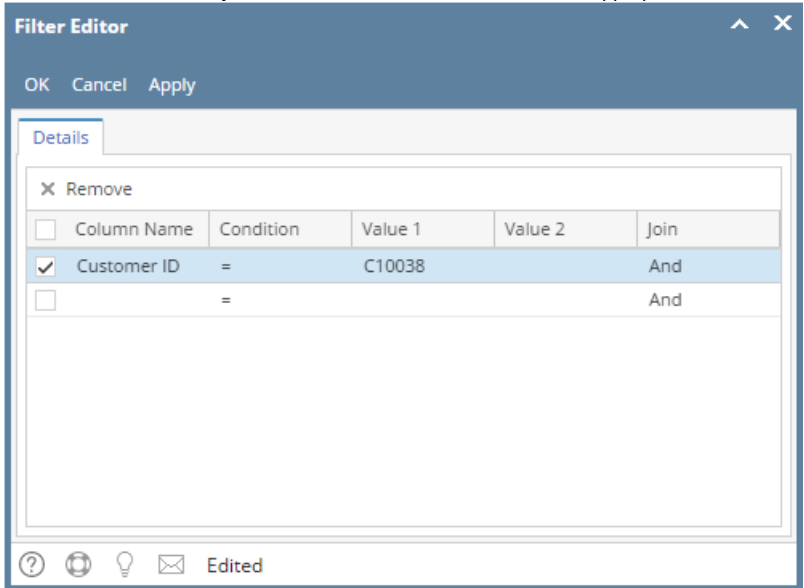
1. On the Dashboard panel, click the **Column Header Menu > Filter Editor button**. This will open the Filter Editor screen.



The screenshot shows a table titled "Customer Invoices Grid" with columns: Date, Customer ID, Company Name, Order Number, Order Total, Amount Due, and Paid Status. A menu is open over the table with options: Sort Ascending, Sort Descending, Columns, Group by this field, Clear Group By, Show Find Panel, and Filter Editor. The "Filter Editor" option is highlighted with a red box.

Date	Customer ID	Company Name	Order Number	Order Total	Amount Due	Paid Status
01/01/2007	C10010	iparty	SA-10001	\$21,870.63	\$0.00	Yes
01/01/2007	C10009	Center	SA-10002	\$15,010.00	\$0.00	Yes
01/01/2007	C10014		SA-10003	\$12,080.52	\$0.00	Yes
01/01/2007	C10015		SA-10004	\$19,200.00	\$0.00	Yes
01/01/2007	C10019		SA-10005	\$17,852.80	\$0.00	Yes
01/15/2007	C10008	JAHL, INC.	SA-10026	\$1,561.50	\$0.00	Yes
01/15/2007	C10007		SA-10029	\$8,328.15	\$0.00	Yes
01/02/2007	C10002		SA-10008	\$201.00	\$0.00	Yes
02/05/2007	C10001		SA-10015	\$3,452.73	\$0.00	Yes
02/06/2007	C10003	gblm-10002		\$500.00	\$0.00	Yes
02/18/2007	C10005	BSM Designs	SA-10173	\$376.95	\$0.00	Yes
02/20/2007	C10007	L&M Home Collection	SA-10016	\$4,894.62	\$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	\$979.55	\$0.00	Yes
03/22/2007	C10010	Master Appliance Company	SA-10018	\$16,418.60	\$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	BSM Designs	SA-10062	\$596.91	\$0.00	Yes
			283	\$8,107,118.95	\$659,760.86	

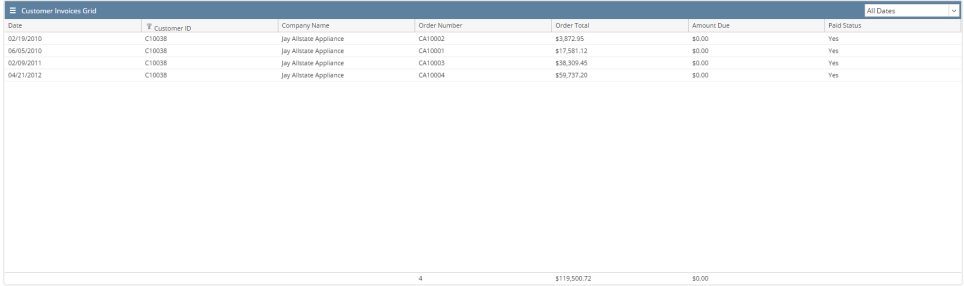
2. Select fields from where you want to filter records from. Select the appropriate **Condition** and enter the **Value**.



The "Filter Editor" dialog box is shown with the "Details" tab selected. It contains a table with columns: Column Name, Condition, Value 1, Value 2, and Join. A filter rule is added for "Customer ID" with the condition "=" and the value "C10038". The "And" join is selected. There are "OK", "Cancel", and "Apply" buttons at the top. At the bottom, there are icons for help, refresh, lightbulb, and email, along with the word "Edited".

Column Name	Condition	Value 1	Value 2	Join
☒ Customer ID	=	C10038		And
☐	=			And

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.



The screenshot shows the "Customer Invoices Grid" after applying the filter. Only records for Customer ID "C10038" are displayed.

Date	Customer ID	Company Name	Order Number	Order Total	Amount Due	Paid Status
02/19/2010	C10038	Jay Altsate Appliance	CA10002	\$3,872.35	\$0.00	Yes
06/05/2010	C10038	Jay Altsate Appliance	CA10001	\$17,581.12	\$0.00	Yes
02/09/2011	C10038	Jay Altsate Appliance	CA10003	\$38,309.45	\$0.00	Yes
04/21/2012	C10038	Jay Altsate Appliance	CA10004	\$58,737.20	\$0.00	Yes

4 \$119,500.72 \$0.00

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

The Filter Editor dialog box has a title bar with 'Filter Editor' and window controls. Below the title bar are 'OK', 'Cancel', and 'Apply' buttons. The 'Details' tab is selected. A 'Remove' button is at the top left of the filter area. The filter area contains a table with columns: 'Column Name', 'Condition', 'Value 1', 'Value 2', and 'Join'. The first row is 'Customer ID = C10038 And'. The second row is highlighted in blue and contains a checkmark in the 'Column Name' column, an empty dropdown, an equals sign, and another empty dropdown. The status bar at the bottom shows icons for help, refresh, lightbulb, and email, followed by the word 'Edited'.



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

i21 Invoices					
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.

i21 Invoices					
Hide	Find: Brown x				
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.

i21 Invoices					
Hide	Find: Brown x				
DATE	CUSTOMER ID	NAME	INVOICE NUMBER	INVOICE TOTAL	PAYMENT STATUS

4. To remove the Find field, click the **Hide** button or the **Column Header Menu > Hide Find Panel** button.

i21 Invoices					
Hide	Find: Brown x				
DATE	CUSTOMER ID	NAME	INVOICE NUMBER	INVOICE TOTAL	PAYMENT STATUS

i21 Invoices					
Hide	Find: Brown x				
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