

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.

Customer Invoices Grid							All Dates
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	John, 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	Show Find Panel	SA-10008	\$201.00	\$0.00	Yes	
02/05/2007	C10001	Filter Editor	SA-10015	\$3,452.73	\$0.00	Yes	
02/06/2007	C10003		GBMV-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**.

Filter Editor

OK Cancel Apply

Details

Remove

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

Customer Invoices Grid							All Dates
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 shows 'Customer ID' with an equals sign condition and 'C10038' as the value, with 'And' as the join. A second empty row is highlighted in blue, with a red box around the 'Column Name' dropdown menu. At the bottom of the dialog are 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.

The screenshot shows a table titled 'i21 Invoices' with columns: DATE, CUSTOMER ID, NAME, INVOICE NUMBER, INVOICE TOTAL, and PAYMENT STATUS. The 'INVOICE NUMBER' column header has a menu open with options: Sort Ascending, Sort Descending, Columns, Group by this field, Clear Group By, Show Find Panel (highlighted with a red box), and Filter Editor. The table data includes several rows of invoice information.

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				
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				
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				
DATE	CUSTOMER ID	NAME	INVOICE NUMBER	INVOICE TOTAL	PAYMENT STATUS

i21 Invoices					
Hide	Find: Brown				
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