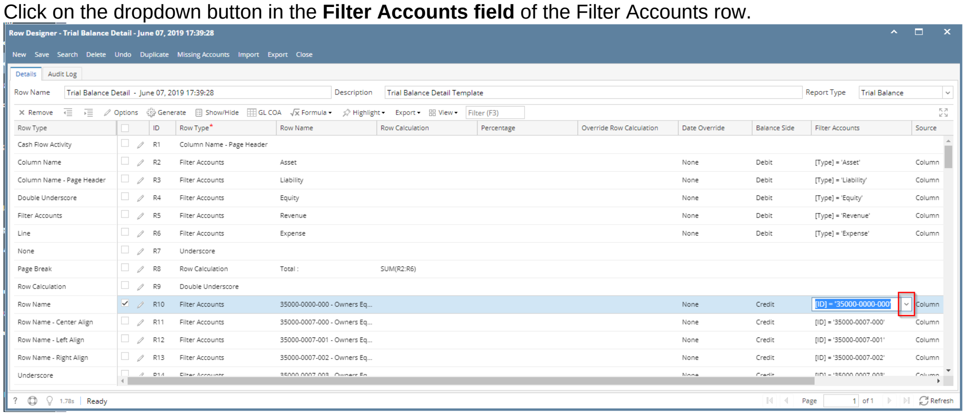
How to Configure Account Filter using Filter Accounts

The Filter Accounts screen is used to configure accounts filter for the following rows.

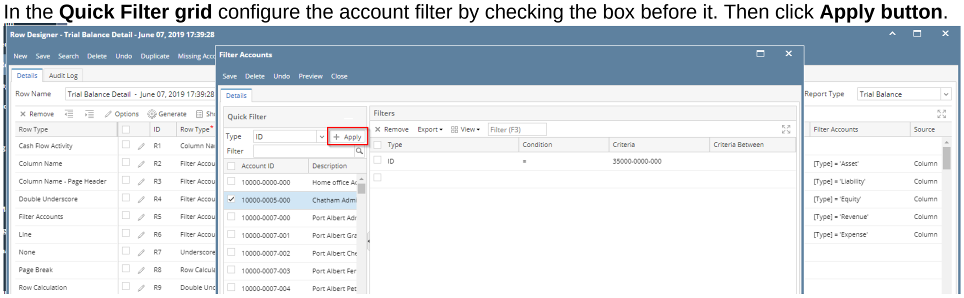
- Filter Accounts row
- Cash Flow Activity row

The following steps will guide you on how to setup filter accounts.

1. Click on the dropdown button in the **Filter Accounts field** of the Filter Accounts row.



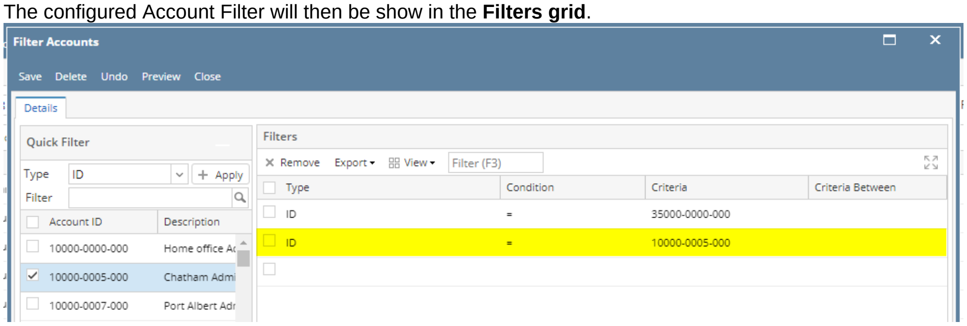
2. The **Filter Accounts** screen will be opened.
3. In the **Quick Filter grid** configure the account filter by checking the box before it. Then click **Apply button**.



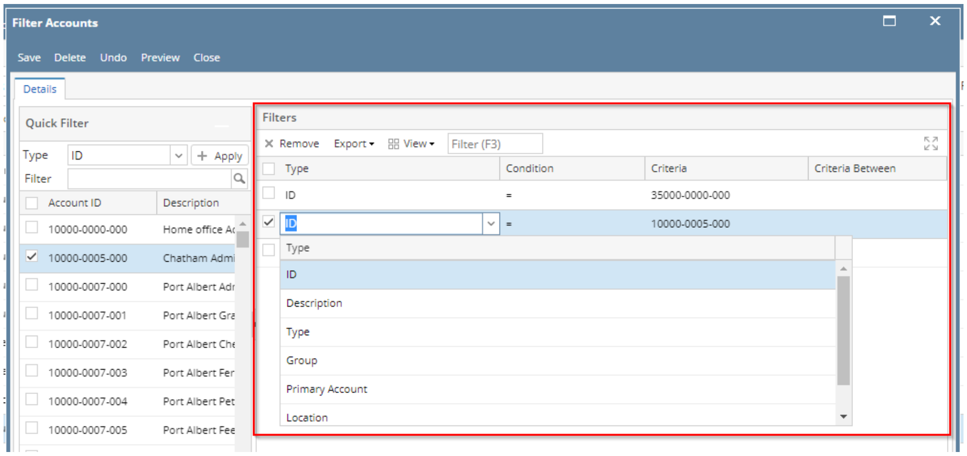
There are different ways to configure filter accounts depending on your need. See below how the grid changes and how accounts can be configured depending on Type selected from Quick Filter grid > Type field.

   a. If **ID** is selected, Account IDs will be shown in the grid below it. Select the Account ID/s and click Apply button.
   b. If **Description** is selected, Account Descriptions will be shown in the grid below it. Select the Account Description/s and click Apply button.
   c. If **Type** is selected, Account Types will be shown in the grid below it. Select the Account Type/s and click Apply button.
   d. If **Group** is selected, Account Groups will be shown in the grid below it. Select the Account Group/s and click Apply button.
   e. If **Primary Account** is selected, Primary Accounts will be shown in the grid below it. Select the Primary Account/s and click Apply button.
   f. If **Location** is selected, Locations will be shown in the grid below it. Select the Location/s and click Apply button.

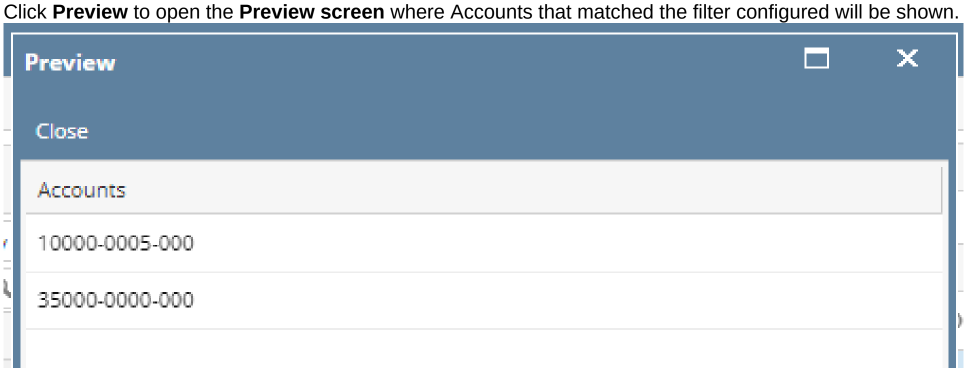
4. The configured Account Filter will then be show in the **Filters grid**.



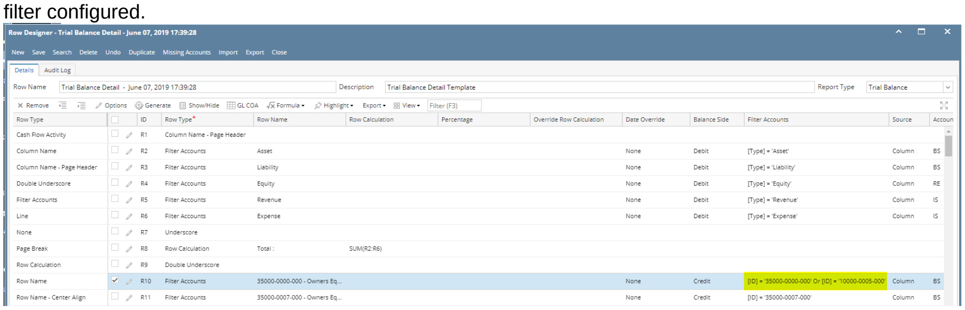
or directly configure the account filter from Filters grid



5. Click **Save**.
6. Click **Preview** to open the **Preview screen** where Accounts that matched the filter configured will be shown.



7. Click **Close.** Filter Accounts screen is closed. You will be back in the Row Designer screen, this time **Filter Accounts field** will show the account filter configured.



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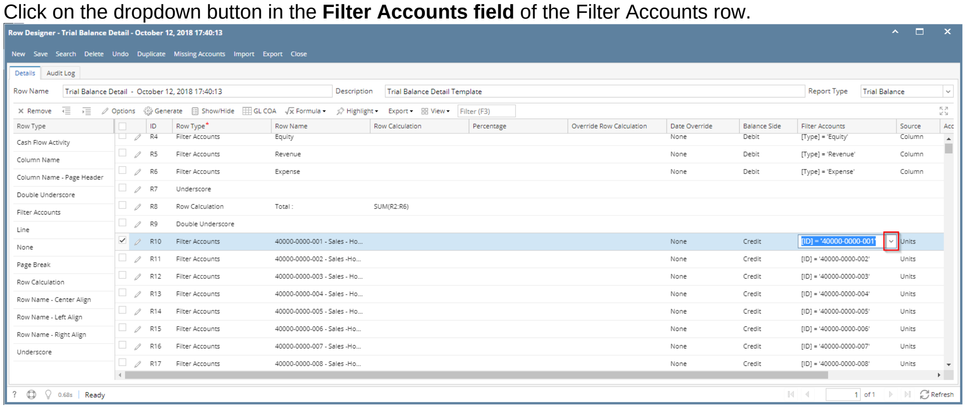
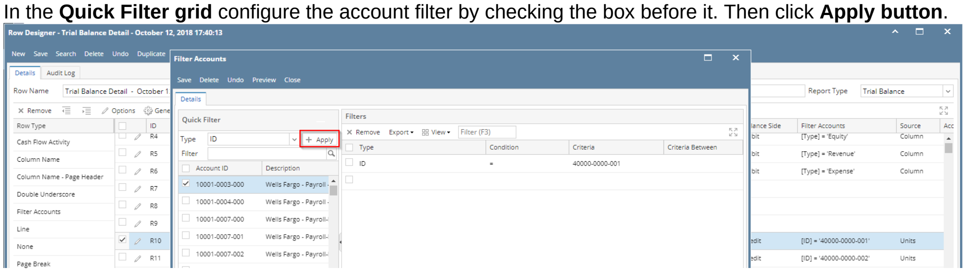


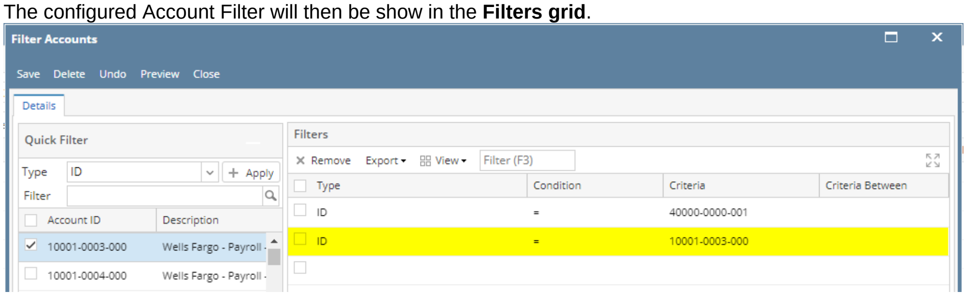
2. The **Filter Accounts** screen will be opened.
3. In the **Quick Filter grid** configure the account filter by checking the box before it. Then click **Apply button**.



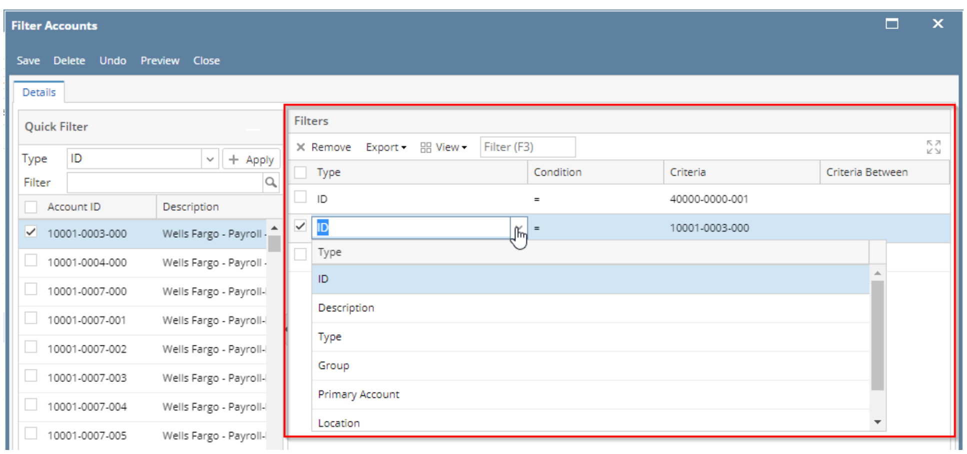
There are different ways to configure filter accounts depending on your need. See below how the grid changes and how accounts can be configured depending on Type selected from Quick Filter grid > Type field.

a. If **ID** is selected, Account IDs will be shown in the grid below it. Select the Account ID/s and click Apply button.
b. If **Description** is selected, Account Descriptions will be shown in the grid below it. Select the Account Description/s and click Apply button.
c. If **Type** is selected, Account Types will be shown in the grid below it. Select the Account Type/s and click Apply button.
d. If **Group** is selected, Account Groups will be shown in the grid below it. Select the Account Group/s and click Apply button.
e. If **Primary Account** is selected, Primary Accounts will be shown in the grid below it. Select the Primary Account/s and click Apply button.
f. If **Location** is selected, Locations will be shown in the grid below it. Select the Location/s and click Apply button.

4. The configured Account Filter will then be show in the **Filters grid**.

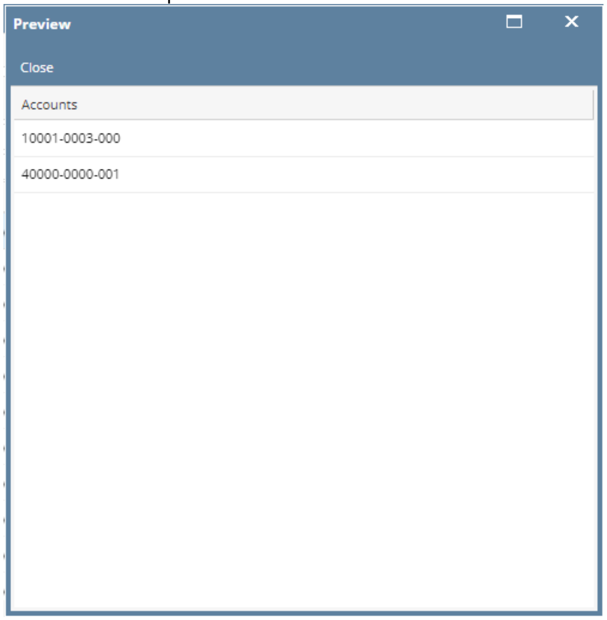


or directly configure the account filter from Filters grid

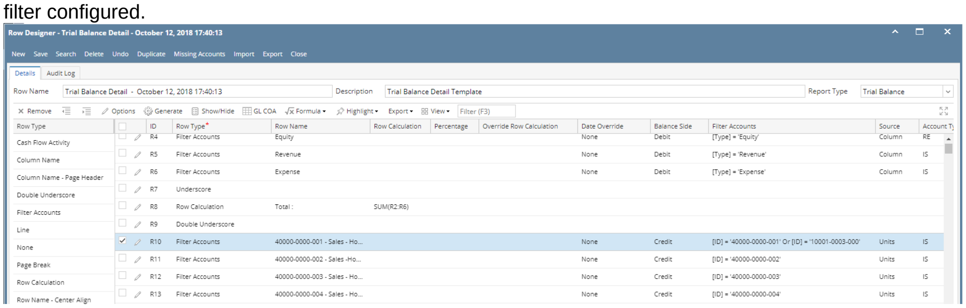


5. Click **Save**.

6. Click **Preview** to open the **Preview screen** where Accounts that matched the filter configured will be shown.



7. Click **Close.** Filter Accounts screen is closed. You will be back in the Row Designer screen, this time **Filter Accounts field** will show the account filter configured.



The Filter Accounts screen is used to configure accounts filter for the following rows.

- Filter Accounts row
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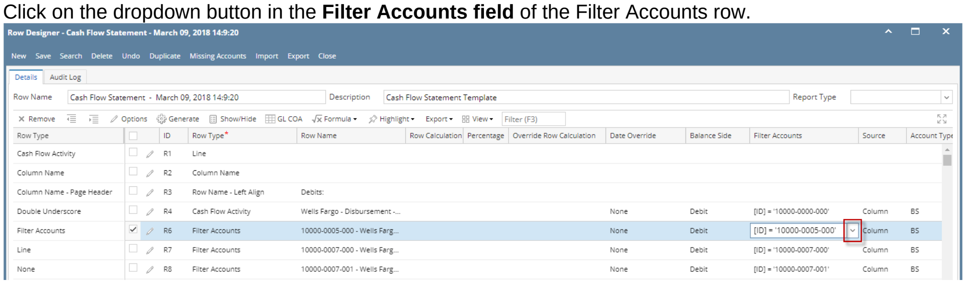
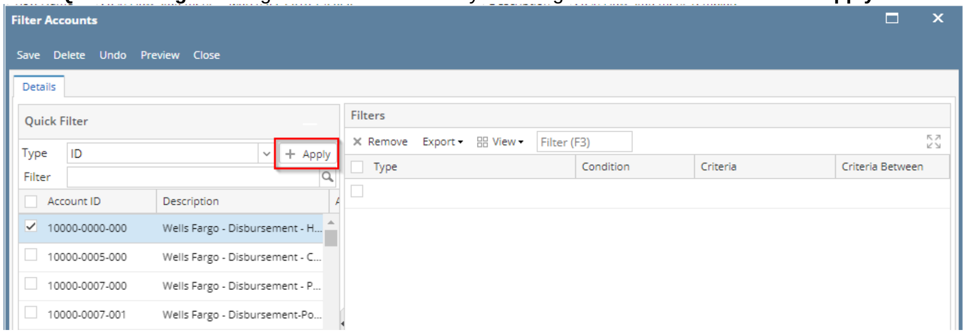
The following steps will guide you on how to setup filter accounts.

1. Click on the dropdown button in the **Filter Accounts field** of the Filter Accounts row.



2. The **Filter Accounts** screen will be opened.

3. In the **Quick Filter grid** configure the account filter by checking the box before it. Then click **Apply button**.



There are different ways to configure filter accounts depending on your need. See below how the grid changes and how accounts can be configured depending on Type selected from Quick Filter grid > Type field.

a. If **ID** is selected, Account IDs will be shown in the grid below it. Select the Account ID/s and click Apply button.
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c. If **Type** is selected, Account Types will be shown in the grid below it. Select the Account Type/s and click Apply button.
d. If **Group** is selected, Account Groups will be shown in the grid below it. Select the Account Group/s and click Apply button.
e. If **Primary Account** is selected, Primary Accounts will be shown in the grid below it. Select the Primary Account/s and click Apply button.
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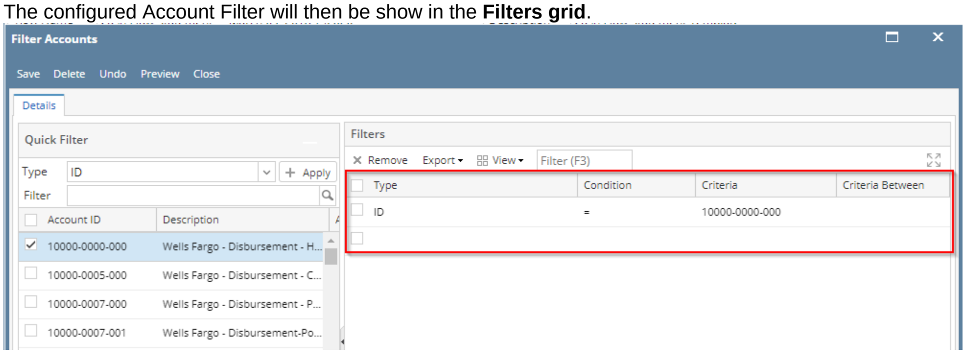
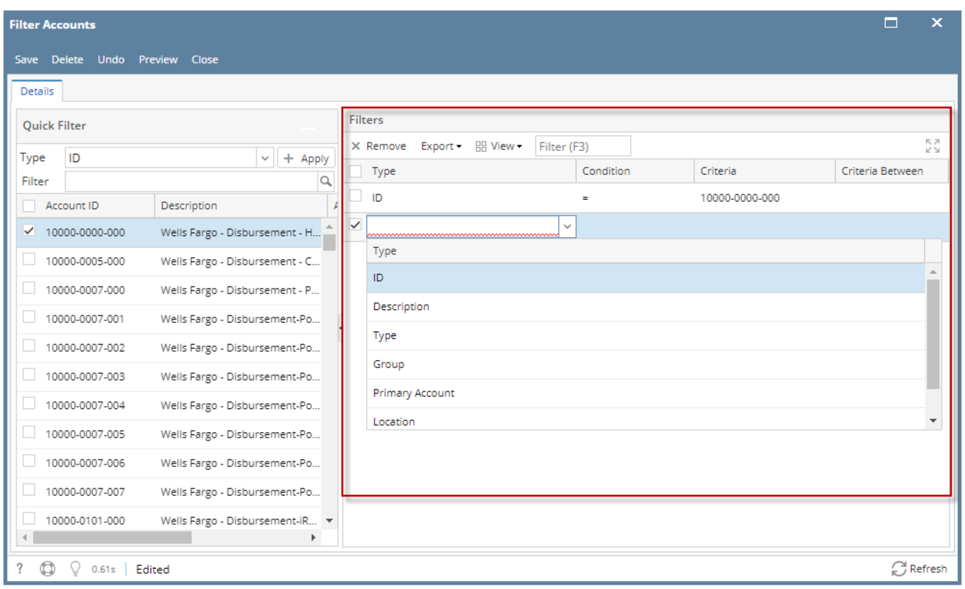
4. The configured Account Filter will then be show in the **Filters grid**.

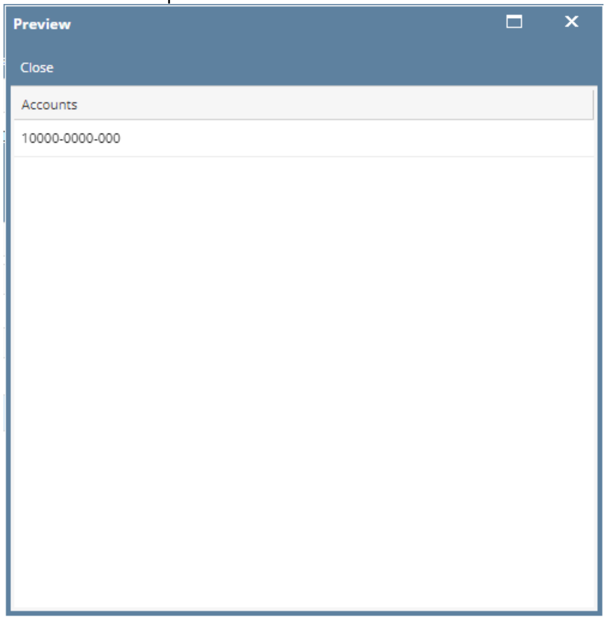


or directly configure the account filter from Filters grid

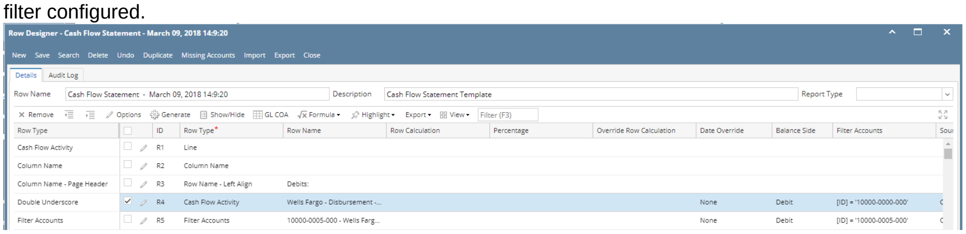


5. Click **Save**.

6. Click **Preview** to open the **Preview screen** where Accounts that matched the filter configured will be shown.



7. Click **Close.** Filter Accounts screen is closed. You will be back in the Row Designer screen, this time **Filter Accounts field** will show the account filter configured.



The Filter Accounts screen is used to configure accounts filter for the following rows.

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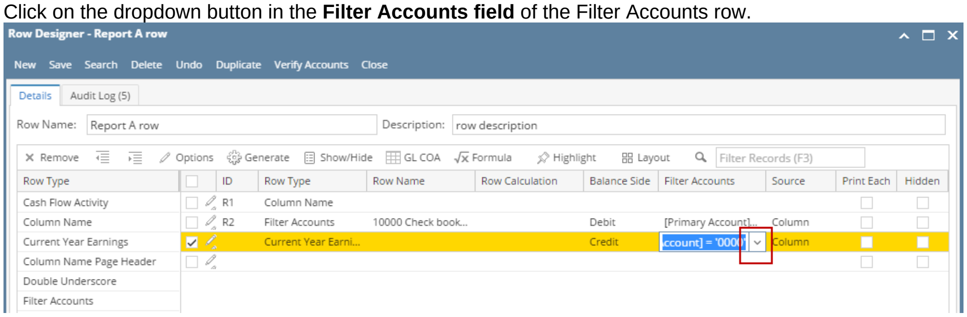
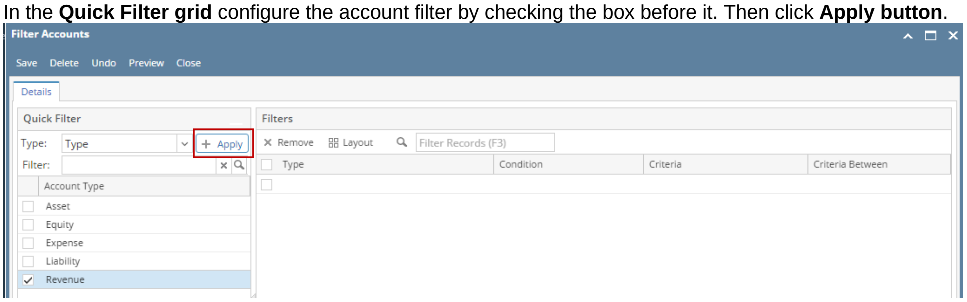
The following steps will guide you on how to setup filter accounts.

1. Click on the dropdown button in the **Filter Accounts field** of the Filter Accounts row.



2. The **Filter Accounts** screen will be opened.
3. In the **Quick Filter grid** configure the account filter by checking the box before it. Then click **Apply button**.



There are different ways to configure filter accounts depending on your need. See below how the grid changes and how accounts can be configured depending on Type selected from Quick Filter grid > Type field.

a. If **ID** is selected, Account IDs will be shown in the grid below it. Select the Account ID/s and click Apply button.

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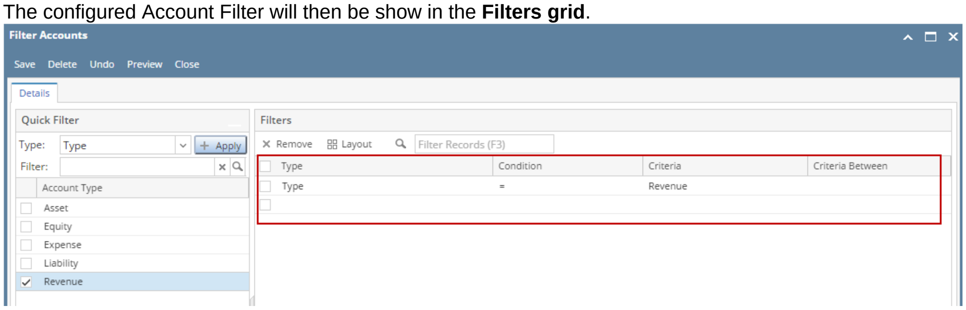
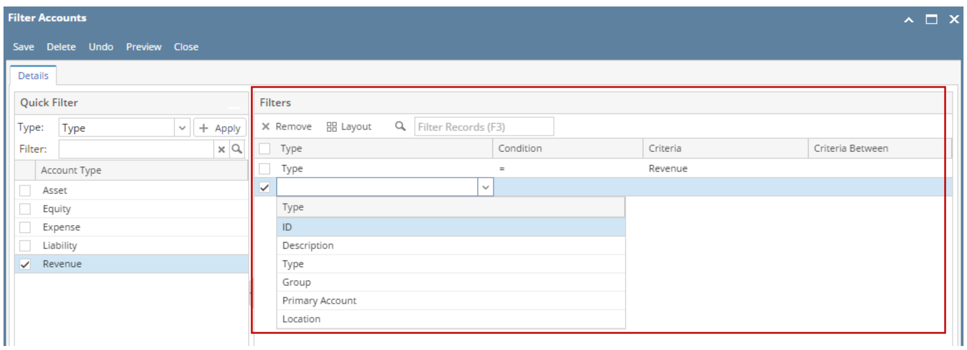
c. If **Type** is selected, Account Types will be shown in the grid below it. Select the Account Type/s and click Apply button.
d. If **Group** is selected, Account Groups will be shown in the grid below it. Select the Account Group/s and click Apply button.
e. If **Primary Account** is selected, Primary Accounts will be shown in the grid below it. Select the Primary Account/s and click Apply button.
f. If **Location** is selected, Locations will be shown in the grid below it. Select the Location/s and click Apply button.

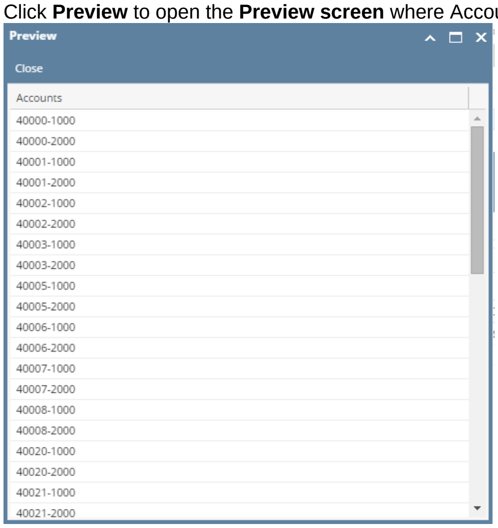
4. The configured Account Filter will then be show in the **Filters grid**.



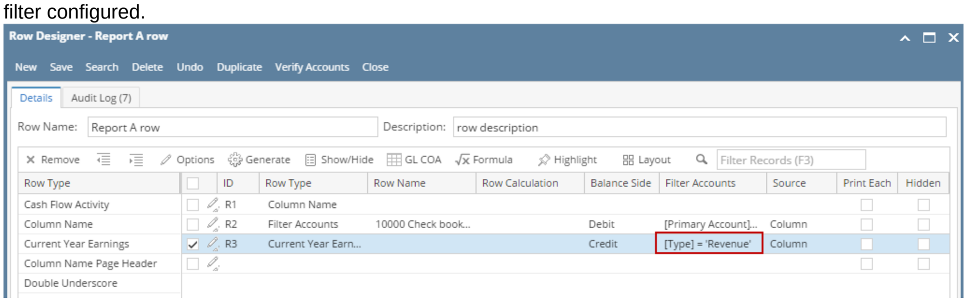
or directly configure the account filter from Filters grid



5. Click **Save**.
6. Click **Preview** to open the **Preview screen** where Accounts that matched the filter configured will be shown.

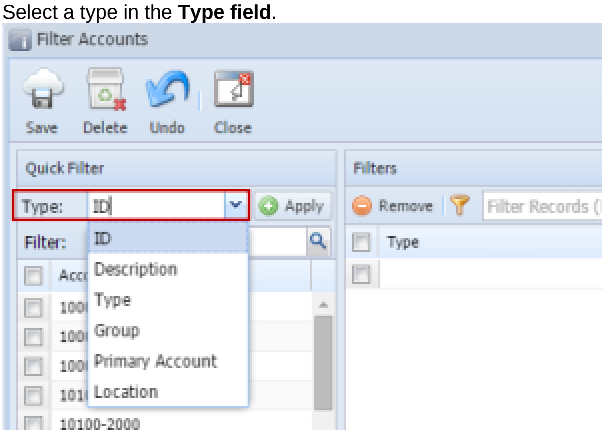


7. Click **Close.** Filter Accounts screen is closed. You will be back in the Row Designer screen, this time **Filter Accounts field** will show the account filter configured.

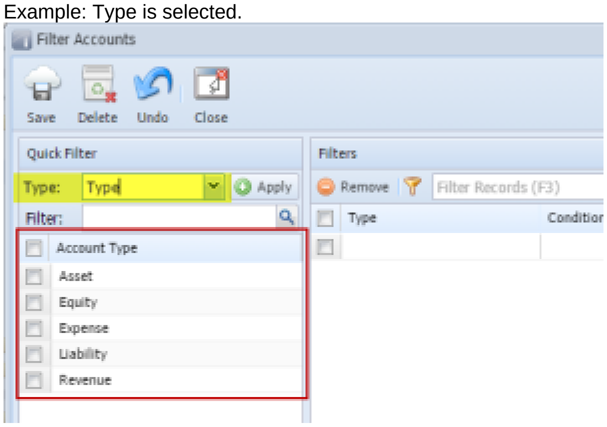


The Filter Accounts screen is used to configure accounts filter for Calculation or Hidden rows. The following steps will guide you on how to filter accounts.

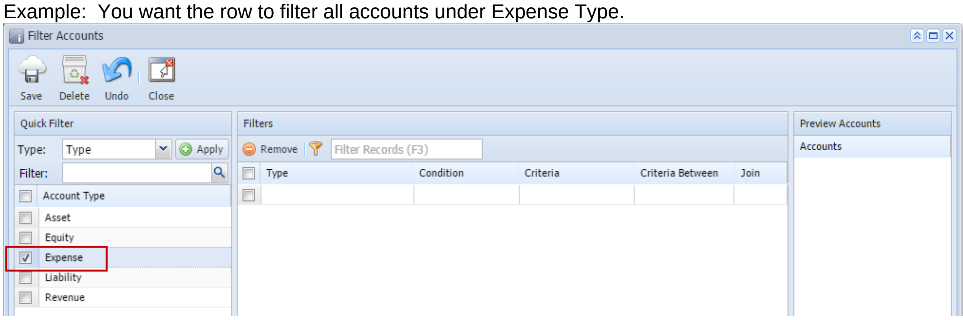
1. Select a type in the **Type field**.



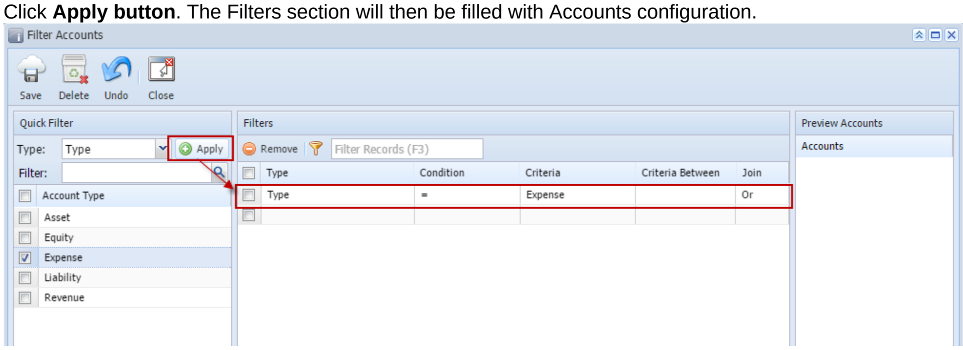
   a. If **ID** is selected, Account IDs will be shown in the grid below it.
   b. If **Description** is selected, Account Descriptions will be shown in the grid below it.
   c. If **Type** is selected, Account Types will be shown in the grid below it.
   d. If **Group** is selected, Account Groups will be shown in the grid below it.
   e. If **Primary Account** is selected, Primary Accounts will be shown in the grid below it.
   f. If **Location** is selected, Locations will be shown in the grid below it.
   Example: Type is selected.



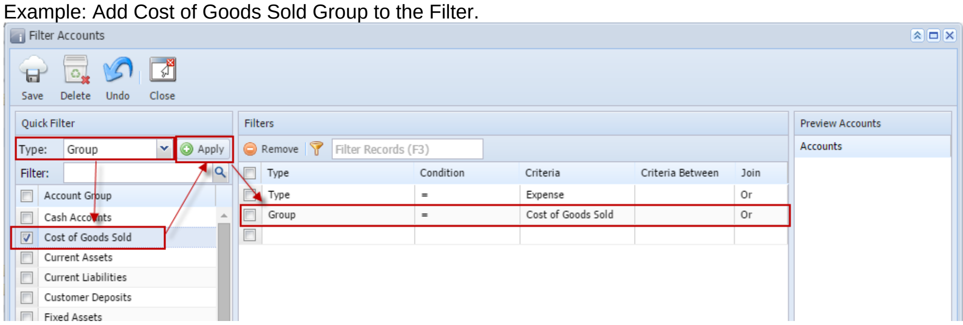
2. Use the **checkbox** to define your account filter.
   Example: You want the row to filter all accounts under Expense Type.



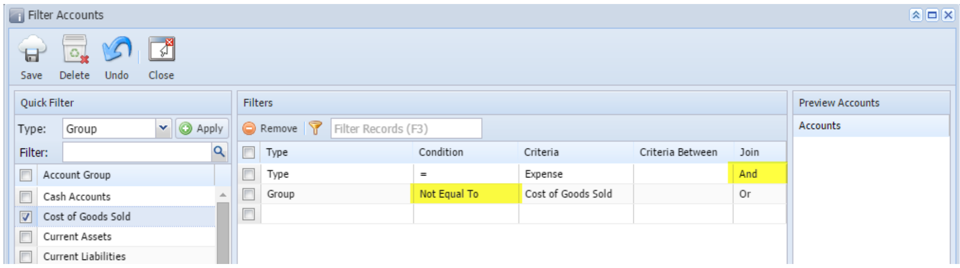
3. Click **Apply button**. The Filters section will then be filled with Accounts configuration.



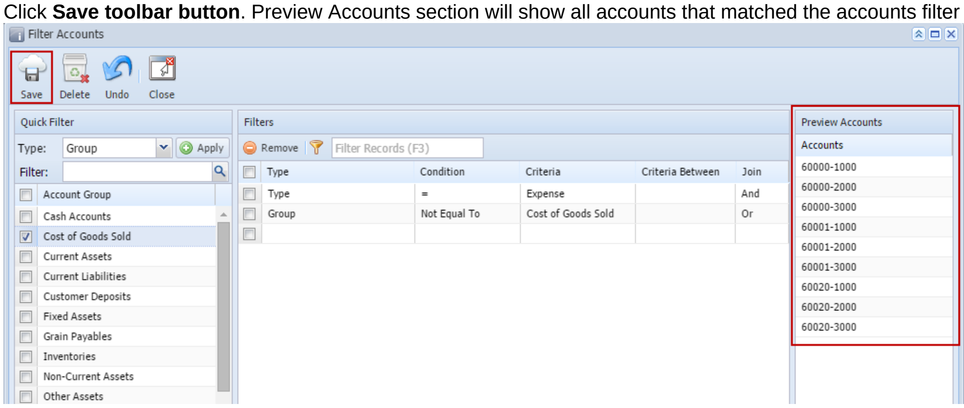
4. Repeat Steps 1 to 3 if you like to filter it even more.
   Example: Add Cost of Goods Sold Group to the Filter.



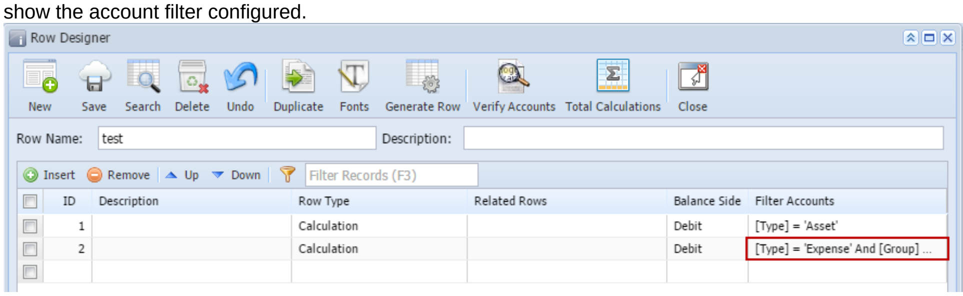
5. Use the **Filters** section, to modify the Conditions. In this example, you will want to filter accounts under Expense Type and Account Group is not Cost of Goods Sold.



6. Click **Save toolbar button**. Preview Accounts section will show all accounts that matched the accounts filter configured.

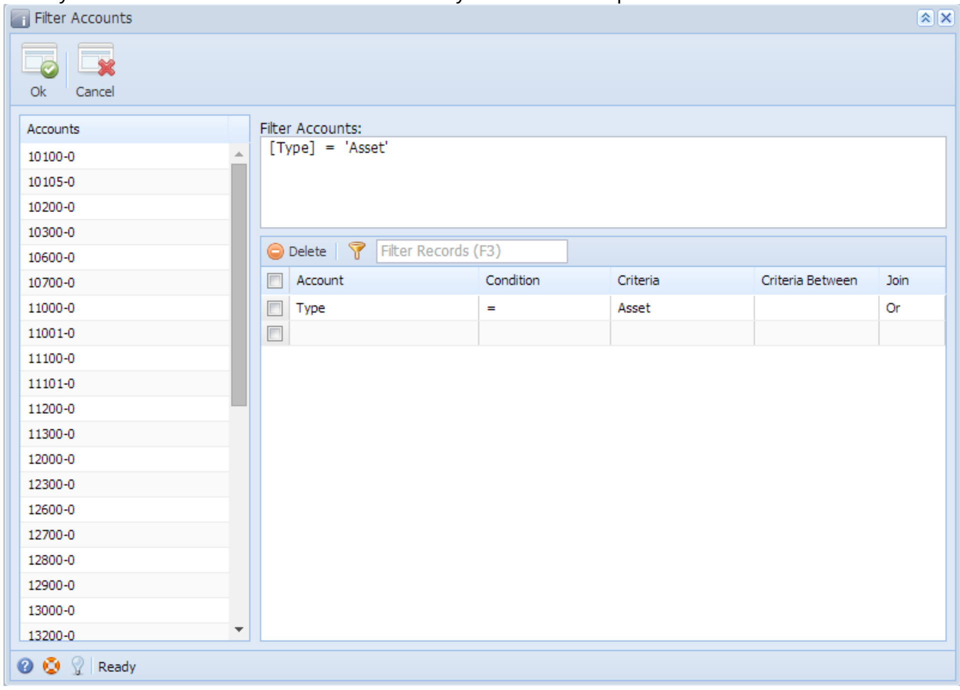


7. Click **Close toolbar button**. Filter Accounts screen is closed. You will be back in the Row Designer screen, this time **Filter Accounts field** will show the account filter configured.



The Filter Accounts screen is used to configure accounts filter for Calculation or Hidden rows. The following steps will guide you on how to filter accounts.

1. Add a new row designer or open existing row designer record.
2. Add Calculation or Hidden row.

3. Place your cursor in the **Filter Accounts field** and you will see an ellipsis button. Click that button and Filter Accounts screen will open.


4. In grid area, center of the screen, that is where you will configure your account filter. The following topics will show you different ways to filter accounts.
5. Click **Close toolbar button** or the **x button** at the top-right corner of the screen and you will be back to the Row Designer screen. Check the **Filte r Accounts field** of the row you just configured and it will show how you had it configured.