

How to Create a Panel with Date Criteria Selection

In this tutorial, we will show how to use and add a date criteria selection and how will it work on individual panels.

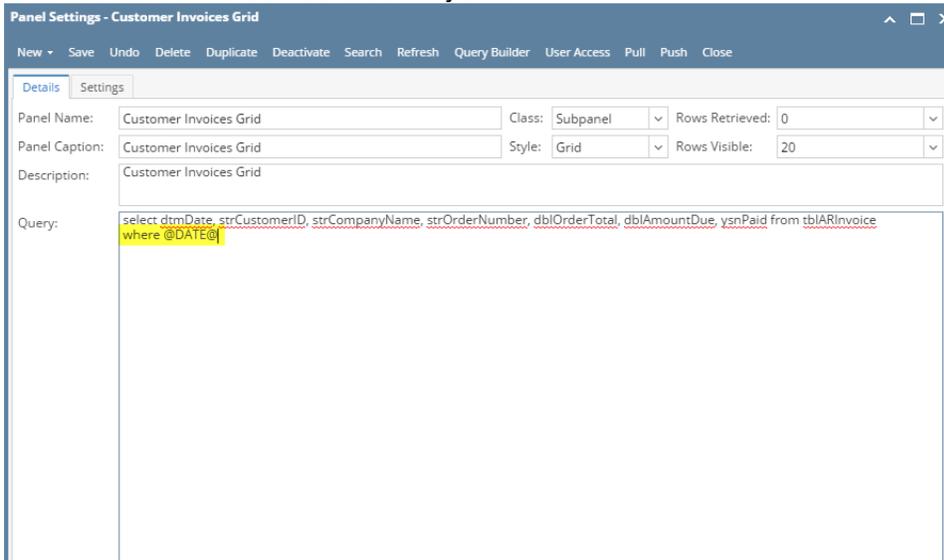
1. Open a Panel Settings record.



The screenshot shows a data grid with columns: Customer ID, Company Name, Order Number, Order Total, Amount Due, and Paid Status. A 'Settings' menu is open over the grid, with the 'Settings' option highlighted. The grid contains 24 rows of invoice data.

Customer ID	Company Name	Order Number	Order Total	Amount Due	Paid Status
C10004	Crest Stockroom Corp	SI-10258	\$50.00	\$50.00	No
C10004	Crest Stockroom Corp	SI-10257	\$25.00	\$25.00	No
C10002	Furniture Place	SI-10251	\$20.00	\$20.00	No
C10002	Furniture Place	SI-10252	\$30.00	\$30.00	No
C10002	Furniture Place	SI-10253	\$30.00	\$30.00	No
C10001	Home Dealers	SI-10254	\$50.00	\$50.00	No
C10001	Home Dealers	SI-10255	\$50.00	\$50.00	No
C10003	B&M Designs	SI-10256	\$50.00	\$50.00	No
C10001	Home Dealers	SI-10250	\$100.00	\$100.00	No
C10001	Home Dealers	SI-10249	\$100.00	\$100.00	No
C10001	Home Dealers	SI-10248	\$9.99	\$9.99	No
C10001	Home Dealers	SI-10247	\$100.00	\$100.00	No
C10001	Home Dealers	SI-10246	\$77.95	\$77.95	No
C10001	Home Dealers	SI-10245	\$9.99	\$9.99	No
C10006	Annie's Discount Center	SI-10243	\$1,554.55	\$1,554.55	No
C10014	High Design & Mfg	SI-10237	\$319.31	\$319.31	No
C10001	Home Dealers	SI-10232	\$100.00	\$100.00	No
C10042	Dreamland Bedding, Inc.	SI-10242	\$2,000.00	\$2,000.00	No
C10012	HY Fine Furnishings	SI-10236	\$299.95	\$299.95	No
C10010	Master Appliance Company	SI-10244	\$109.89	\$109.89	No
			283	\$8,107,118.95	\$699,760.86

2. Declare the clause Where @DATE@ on the Query field.



The screenshot shows the 'Panel Settings - Customer Invoices Grid' dialog box. It has tabs for 'Details' and 'Settings'. The 'Settings' tab is active. Fields include: Panel Name (Customer Invoices Grid), Class (Subpanel), Rows Retrieved (0), Panel Caption (Customer Invoices Grid), Style (Grid), and Rows Visible (20). The Query field contains the following SQL: `select dtmDate, strCustomerID, strCompanyName, strOrderNumber, dblOrderTotal, dblAmountDue, ysnPaid from tblARInvoice where @DATE@`

3. Select any available pre-defined values of Date Condition and Date Variable.

4. Select the appropriate **Date Field** for the date criteria.

Panel Settings - Customer Invoices Grid

Panel Name: Customer Invoices Grid Class: Subpanel Rows Retrieved: 0

Panel Caption: Customer Invoices Grid Style: Grid Rows Visible: 20

Description: Customer Invoices Grid

Query: select dtmDate, strCustomerID, strCompanyName, strOrderNumber, dblOrderTotal, dblAmountDue, ysnPaid from tblARInvoice where @DATE@

Connection: VisionCore Date Condition: All Dates Date Field: dtmDate

Other Filter: None Filter Variable: Filter Field:

Drill Down: None Auto Refresh panel every 1 Minute

Owner: irelyadmin Order By: Descending

5. Save and close the Panel Settings record. The panel on the Dashboard will be automatically refreshed, and will now display the **Date Filter** field on the upper right-hand corner. This combo box list will show the same predefined dates on the **Panel Settings > Date Condition** field.

Date	Customer ID	Company Name	Order Number	Order Total	Amount Due	Paid Status
12/04/2015	C10004	Crest Stockroom Corp	SI-10258	\$50.00	\$50.00	No
11/30/2015	C10004	Crest Stockroom Corp	SI-10257	\$25.00	\$25.00	No
11/11/2015	C10002	Furniture Place	SI-10251	\$20.00	\$20.00	No
11/10/2015	C10002	Furniture Place	SI-10252	\$30.00	\$30.00	No
11/09/2015	C10002	Furniture Place	SI-10253	\$30.00	\$30.00	No
11/04/2015	C10001	Home Dealers	SI-10254	\$50.00	\$50.00	No
10/25/2015	C10001	Home Dealers	SI-10255	\$50.00	\$50.00	No
09/20/2015	C10003	B&M Designs	SI-10256	\$50.00	\$50.00	No
10/04/2014	C10001	Home Dealers	SI-10250	\$100.00	\$100.00	No
09/28/2014	C10001	Home Dealers	SI-10249	\$100.00	\$100.00	No
09/06/2014	C10001	Home Dealers	SI-10248	\$9.99	\$9.99	No
08/28/2014	C10001	Home Dealers	SI-10247	\$100.00	\$100.00	No
05/20/2014	C10001	Home Dealers	SI-10246	\$77.95	\$77.95	No
05/15/2014	C10001	Home Dealers	SI-10245	\$9.99	\$9.99	No
05/06/2013	C10006	Annex's Discount Center	SI-10243	\$1,554.55	\$1,554.55	No
05/06/2013	C10014	High Design & Mtg	SI-10237	\$319.31	\$319.31	No
05/06/2013	C10001		SI-10232	\$100.00	\$100.00	No
04/24/2013	C10042	Dreamland Bedding, Inc.	SI-10242	\$2,000.00	\$2,000.00	No
04/17/2013	C10012	HY Fine Furnishings	SI-10236	\$299.95	\$299.95	No
04/12/2013	C10010	Master Appliance Company	SI-10244	\$109.89	\$109.89	No
			263	\$8,107,118.95	\$699,760.86	

As you change the selected date filter, the panel will automatically refresh and display records respectively.