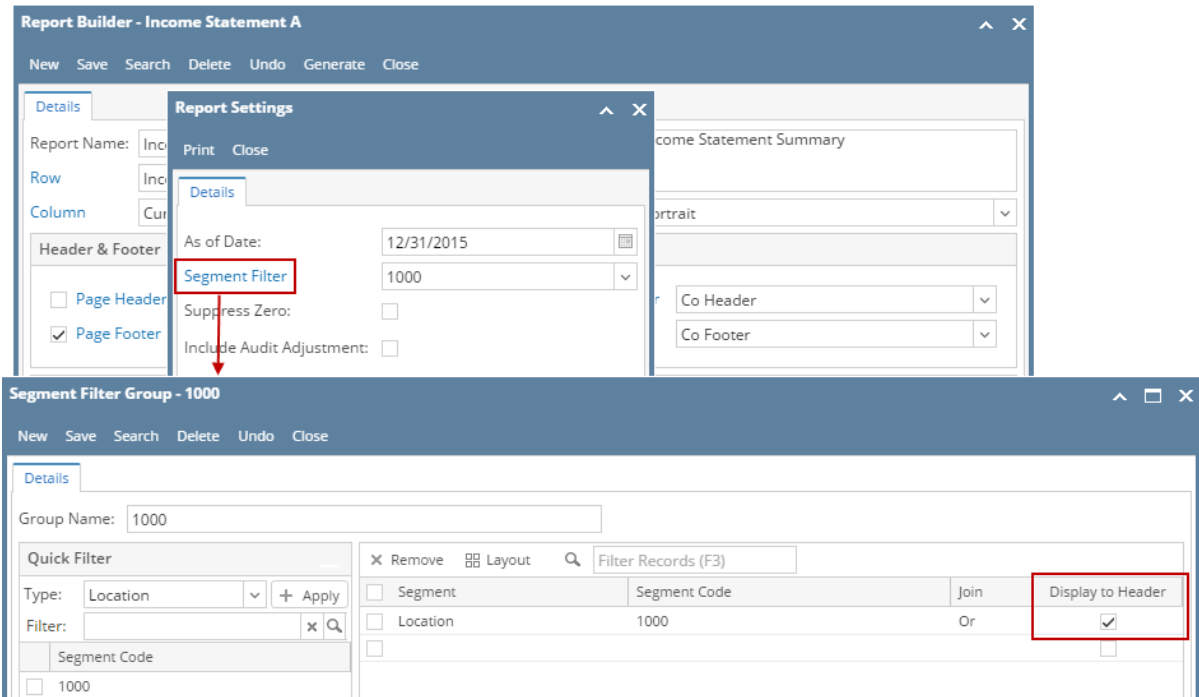


How to Use Segment Filter field in the Report Settings screen

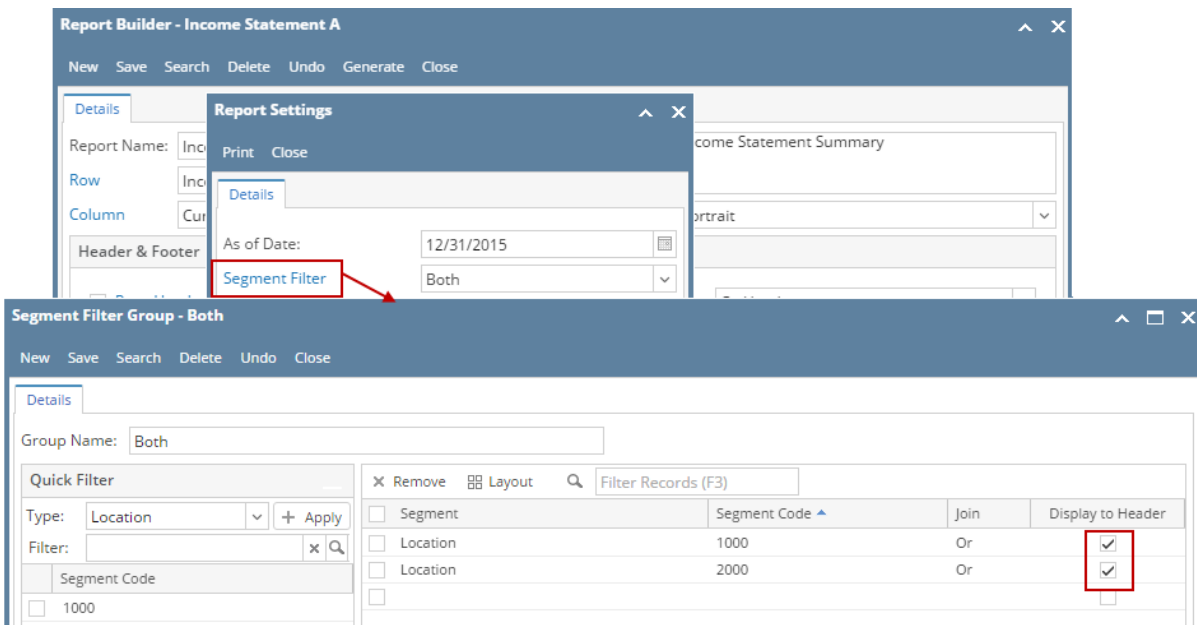
- 1. In the Report Settings screen, select a **Segment Filter**. Then click the **Segment Filter** label to open the Segment Filter Group screen.
- 2. If you want the Segment Filter be shown on the report when previewed or printed, check the **Display to Header** checkbox, else leave it unchecked.



Here's how it is shown when report is previewed/printed. Highlighted section is the Segment Filter Group type header/footer.

i21 Test Company Income Statement A As Of 12/31/2015 11:59:59 PM				
Wednesday, February 17, 2016 7:44 PM				
Location: 1000				
Row ID	Row Name	2015	2014	Total
R4	Revenue	18,329.75	1,000.00	19,329.75
R5	Expense	16,952.74	0.00	16,952.74
R7	Net Income	1,377.01	1,000.00	2,377.01

If multiple segments are checked, then all these segments are shown on the report.



i21 Test Company Income Statement A As Of 12/31/2015 11:59:59 PM Wednesday, February 17, 2016 7:55 PM Location: 1000 Or Location: 2000				
Row ID	Row Name	2015	2014	Total
R4	Revenue	18,329.75	1,000.00	19,329.75
R5	Expense	16,952.74	0.00	16,952.74
R7	Net Income	1,377.01	1,000.00	2,377.01

You can enhance this header/footer by setting its **Font Properties** and **Row Height**. See [How to Configure header and footer font properties and row height](#) topic to guide you on how to do this.

Say this is the column designer configuration.

The screenshot shows the 'Column Designer' window for the 'SegFil' column. The 'Filter Records (F3)' table is visible, showing columns for ID, Column Description, Caption, Column Type, Filter Type, Related Columns, Segment Used, Budget Code, Start Date, End Date, Width, Alignment, Format, and Hidden. The table contains 6 rows of configuration for different segments and locations.

And this column designer is used as component of one of your financial reports.

The screenshot shows the 'Report Builder' window. The 'Report Name' is 'Income Statement' and the 'Description' is 'Income Statement by Account'. The 'Row' is set to 'IS' and the 'Column' is set to 'SegFil'. The 'Orientation' is set to 'Portrait'. A red box highlights the 'Column' dropdown menu.

1. When printing report, make sure that **Show Report Settings** checkbox is checked. Click **Generate** toolbar button.

Report Builder

New Save Search Delete Undo Generate Close

Report Name: Income Statement Description: Income Statement by Account

Row: IS

Column: SegFil Orientation: Portrait

Header & Footer

Page Header: Report Header:

Page Footer: Report Footer:

Margins

Top: 5 Bottom: 5

Left: 5 Right: 5

Gutter: 0

Options

☒ Show Default Header & Footer

☒ Show Report Settings

2. The **Report Setting** screen opens. In the **Segment Filter** field select the segment you want all your columns with Segment Filter column type be filtered. Take note that this overrides what had been setup in the Column type segment filter.

Report Settings

Print Close

As of Date: 04/14/2015

Segment Filter: Group 4 - All Loc

Suppress Zero: ☐

Include Audit Adjustment: ☐

If you have not yet configured a segment filter, click the **ellipsis** button to open the **Segment Filter Group** screen to add or edit a segment filter. See [How to Configure Segment Filter Group screen](#).

3. If you want to print the report but would like to filter only those transpired for a specific segment like shown in the screenshot below, then you can create and configure the **Segment Filter Group** screen to reflect that segment group only and select that in the Segment Filter field when printing the report.

Report Settings

Print Close

As of Date: 04/14/2015

Segment Filter: Group 1 - Loc 1000

Segment Filter Group

New Save Search Delete Undo Close

Group Name: Group 1 - Loc 1000

Remove Filter Records (F3)

Segment	Segment Code	Join	Display to Header
Location	1000	Or	☒

See in the below report, only the totals for selected segment filter is shown in the report, other segments are showing 0.00.

Income Statement					
As Of 4/14/2015			Tuesday, April 14, 2015 10:01 AM		
		1000 - Loc A	2000 - Loc B	3000 - Loc C	All Segments
R1	40000 - Sales	2,500.00	0.00	0.00	2,500.00
R2	50000 - Cost of Goods Sold	800.00	0.00	0.00	800.00
R7	Gross Margin	1,700.00	0.00	0.00	1,700.00
R9	Gross Margin Rate	68.00%	NaN	NaN	68.00%
R4	60000 - Other Expenses	900.25	0.00	0.00	900.25
R6	70000 - Other Revenues	200.00	0.00	0.00	200.00
R11	Net Income	999.75	0.00	0.00	999.75

You can even create different Segment groups with its corresponding segment filter configuration so that you will just have to select it when printing reports. Below is an example of filters for difference segment groups.

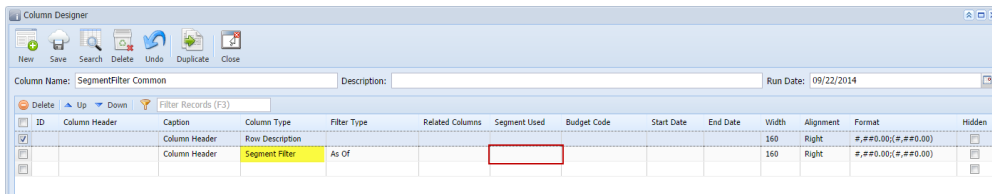
And here is a sample of multiple segments configured for a segment filter group.

Segment	Segment Code	Join	Display to Header
Location	1000	Or	☒
Location	2000	Or	☒
Location	3000	Or	☒

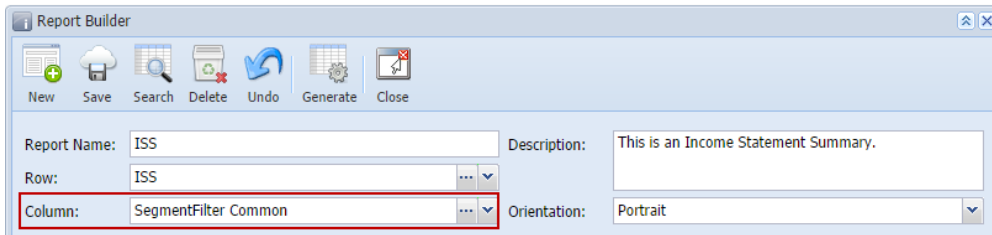
See in the below report, totals for selected segment filters are shown in the report.

Income Statement					
As Of 4/14/2015			Tuesday, April 14, 2015 10:10 AM		
		1000 - Loc A	2000 - Loc B	3000 - Loc C	All Segments
R1	40000 - Sales	2,500.00	1,100.00	800.00	4,400.00
R2	50000 - Cost of Goods Sold	800.00	250.00	150.00	1,200.00
R7	Gross Margin	1,700.00	850.00	650.00	3,200.00
R9	Gross Margin Rate	68.00%	77.27%	81.25%	72.73%
R4	60000 - Other Expenses	900.25	50.00	30.00	980.25
R6	70000 - Other Revenues	200.00	0.00	0.00	200.00
R11	Net Income	999.75	800.00	620.00	2,419.75

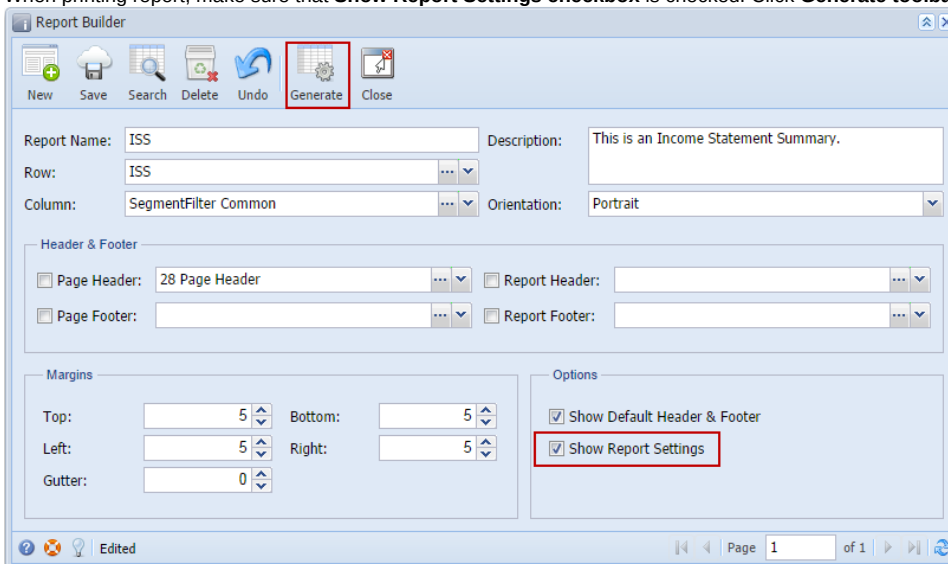
Say this is the column designer configuration. **Segment Filter** column here does not have Column Segment Filter configuration, as the Segment Used field shows blank.



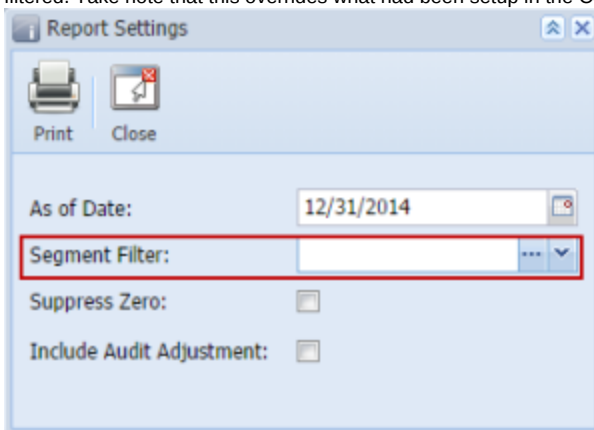
And this column designer is used as component of one of your financial reports.



1. When printing report, make sure that **Show Report Settings** checkbox is checked. Click **Generate** toolbar button.

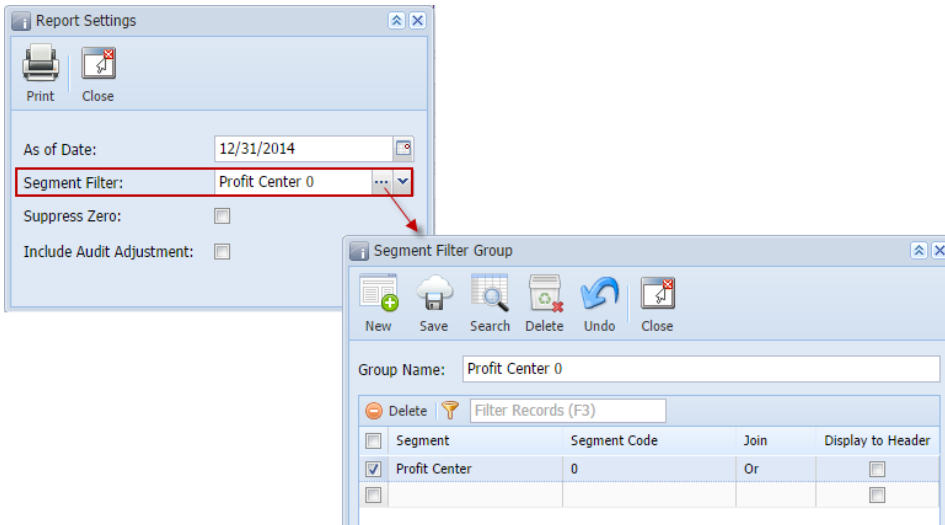


2. The **Report Setting** screen opens. In the **Segment Filter** field select the segment you want all your columns with Segment Filter column type be filtered. Take note that this overrides what had been setup in the Column type segment filter.



If you have not yet configured a segment filter, click the **ellipsis** button to open the **Segment Filter Group** screen to add and configure a filter. See [How to Add Segment Filter from Column Designer](#).

3. If you want to print the report but would like to filter only those transpired for a specific segment like shown in the screenshot below, then you can create and configure the **Segment Filter Group** screen to reflect that segment group and select that in the Segment Filter field when printing the report.



You can even create different Segment groups with its corresponding segment filter configuration so that you will just have to select it when printing reports. Now the Column Designer record with Segment Filter column type setup becomes just a template and it is the **Segment Filter** field in the Report Settings screen who controls what information to show based on the selected segment filter.

4. Here's how it is shown when report is previewed/printed.

Sales	10,980.00
Less: COGS	3,280.00
Gross Profit	7,700.00
Gross Profit Rate	70.13%
Less: Expenses	1,652.00
Add: REvenues	2,802.00
Net Income (Loss)	8,850.00

The totals above reflect only of the Profit Center > 0 - General.

