Selection Criteria

Most of our reports have the option for Selection Criteria. This feature allows you to filter the records you want. We already have date and batch ranges but you can fine tune the report even more by selecting records that meet additional critieria. Some Examples might include:

Show one customer or a list of customers on this report. Custno=Blue

Show the Gasoline Department only. Deptartment=1

Show a report for one vendor only. Vendor=Valero



Figure 1 Click on Selection Criteria

So once you click on the option for Selection, the screen above pops up. The most commonly used options include:

Add	You can add filters like item=E87
Reset	Clear the selections and start over.
Delete	Delete a line on selection
Store	Save this to a template so you can call it up automatically next time.
Retrieve	Retrieve the template so you don't have to type the selections again.

🗡 Filter	Select Field
	Salesman Driver Territory Industry Customer number
	Customer number Inv location Department number Cust loc code Category Item
Add Edit Delete List Count Resot	Vendor Tank number Fedpercent Stpercent Opercent1 Opercent2
Store Retriege Deleje	Opercent3 Opercent4 Opercent5 Opercent5 Opercent7

Figure 2 Press Add and a list of fields pops up

Add a Selection Line by Selecting Fields.

You press the **Add** button and a list of fields comes up. You could select Department Number to see all items in department 1 or Inv Location to see all sales from location 9. You can add multiple selection lines. Example: Dept=1 .and. Vendor=Valero or Item=E97 .or. Item=E93. When doing the same field, use OR not AND.

Filter				Select Operator
				<u>e</u> quals
				does not egual
				begins <u>with</u> contains
				does not contain
				is blank
				is not blank
				is greater than
				is greater than or equal
		1	1.1	is less than
1	Add	Edit	Delete	is less than or equal
	List	Count	Reset	is between in list of
-				choose from list
1	1	1	1	
	Store	Retrieve	Delete	
Nan				

Figure 3 Select Operator

Equal is the most popular **operator**. As the examples above suggest. The option for INLIST lets you enter a list of things to select. See the example below. Once you select an operator, then you will enter the value.

	quals 'E87' quals 'E93'				^
					-
Add	Edit	Delete	1	<u>0</u> K	
List	Count	Reset	+	Cancel	
Lier	Lound	Teser		callea	
Store	Retrieve	Delete			
21010	Keuleže	Delete			

Figure 4 Selection for 2 inventory items

In the above example, the fields selected was item, the operator was **Equal**=, and the **value** was E87. "OR" was used to do another line for another item Equal to E93.

Customer number in list of				Value 1 Value 2 Value 3	ACME BLUE PM1
				Value 4 Value 5 Value 6 Value 7 Value 8 Value 9 Value 9 Value 10 Value 11	PM2
<u>A</u> dd	Edit	Delete	+	OK	
List	Count	Reset	+	Cancel	
Store	Retrieve	Delete			
Name:		· · · · · · · · · · · · · · · · · · ·			

Figure 5 Use inlist for a list of Customers

In the example above, the Inlist operator was selected and a list of customers was typed in. That is a report for a range of dates/batches but only for those 4 customers.

🖌 Filter	
Item equals 'E87'	*
or Item equals 'E93'	
Save Filter Name: gasolinesales Cancel	
Add Edit Delete List Count Reset	<u>O</u> K Ca <u>n</u> cel
Store Retriege Delete	

Figure 6 Save your selections for next time

So you spent 5 minutes crafting the perfect selection criteria. Now click on the **Store** button to save it for next time. This one was named "gasolinesales". Next time you do this report, you can click on the **Retrieve** button to automatically bring up your favorite selection criteria template. See example below.

Arrieve Filter	8
classic gasolinesales	
Add Edit Delete	<u>OK</u> Ca <u>n</u> cel
Store Retrieve Delete Name: gasolinesales	

Figure 7 Retrieve your saved templates

Click on the **Retrieve** Button and it shows you all the Selections you saved. There are 3 of them to choose from in the example above. You see "gasolinesales" which was created above. Highlight a name and press enter. Then press **OK** button to go back to the report.

The List and Count options do not work well because they do not use the rest of the criteria that we have for batches, dates, etc. However, always display the report on the screen first so you can see what it looks like before printing. You want to make sure you got the 10 page report you were looking for and not the 400 page report that displayed because you accidently entered the wrong batch range. If you like the resulting report, you can print the report from the screen display using the Print Button above.