

# List Filters

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## Overview

The **Filter** List option section allows you to filter list results and only view the information that's critical to you, by setting the parameters for what information is shown.

To modify your Filter Lists, click on the Gear icon on the any List.

The screenshot shows the OrderTime Beta interface. The top navigation bar includes Home, Sales, Purchasing, Production, Warehouse, and Reports. The main content area displays a Sales Order - 1 with tabs for General, Bill Address, and Ship Address. The General tab is active, showing details such as No. 1, Customer ABCCom, Date 1/29/2018, Promise Date 1/31/2018, and Customer PO ab001. The Bill Address tab shows COMP1, 123, 4, MIAMI, FL 45778, US. The Ship Address tab shows COMP1, 123, 4, MIAMI, FL 4, US. Below the tabs, there is a search bar with a dropdown menu for Name/Number and a search field for Search Items. A gear icon is highlighted in a red box, indicating the location to click to access the List Options screen.

Once you click on the Gear icon, the List Options screen will be displayed. The Filters tab is broken up into 3 areas:

- **Field:** Available fields you can filter by will be listed (e.g. Promise Date).
- **Operator:** Depending on the Field type of the field selected, the operator is a comparison statement (e.g. Greater Than).
- **Criteria:** The third and final section allows you to set the *criteria* for the filters, which is where you specify one or more values to be used by the operator.

**List Options**

Filters Columns Other

Field	Operator	Criteria
-- None --	-- None --	
-- None --	-- None --	
-- None --	-- None --	
-- None --	-- None --	
-- None --	-- None --	

Save Cancel

Repeat for up to 5 fields.



When combining fields the logical joiner is **AND** meaning **all** filters must resolve to true in order for the entire statement to be true.

## Field Types

Depending on the *Field Type* of the field you select the operator and criteria will change.

### Numbers

When selecting decimals and integer type fields (e.g. Price, Quantity or Id) the operator will show numerical comparison statements. The criteria will only accept numbers.

**List Options**

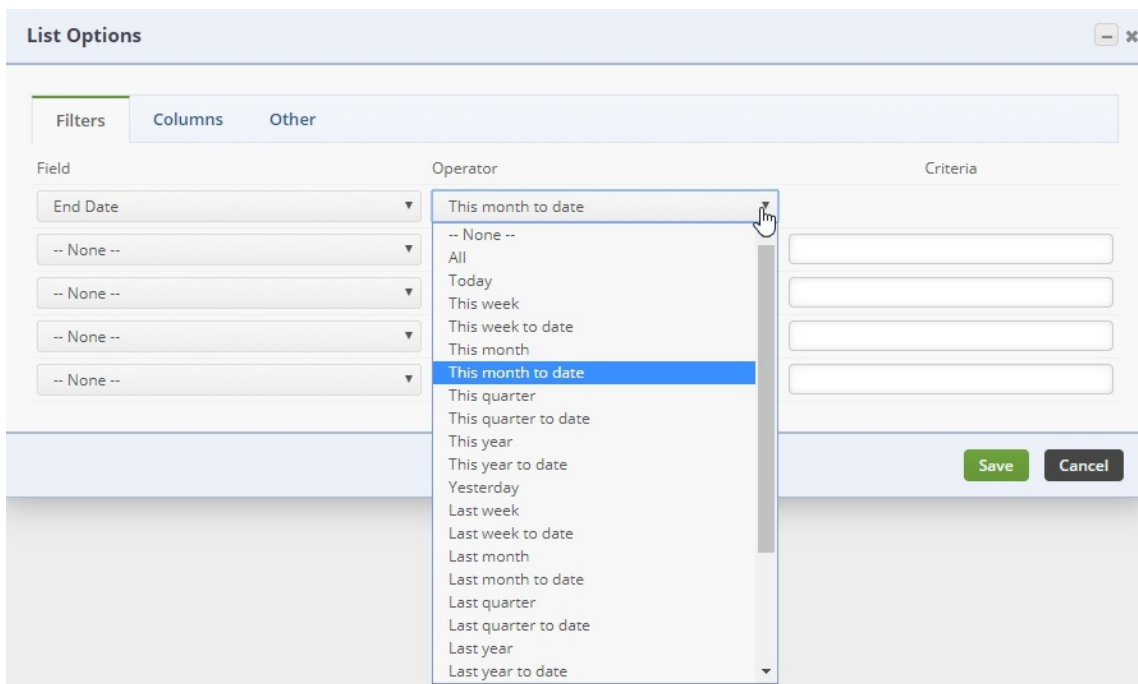
Filters Columns Other

Field	Operator	Criteria
Count	greater than	
-- None --	-- None --	
-- None --	equal to	
-- None --	greater than	
-- None --	less than	
-- None --	greater than or equal	
-- None --	less than or equal	
-- None --	not equal	

Save Cancel

### Dates

When using a Date field (e.g. Promise Date), the operator select will show a list of **date macros** as well as a selection for Custom. A date macro combines that operator and criteria.



## Entity Ref

When the field is an drop down or Entity Ref the criteria will show available selections. To pick multiple selection hold down the *Ctrl* button while clicking with your mouse. The operator will show some database key words:

- in: means includes
- not in: means does not include
- null: means not entered
- not null: means it was entered

**List Options**

Filters Columns Other

Field Operator Criteria

color in -- None -- -- None --

-- None -- -- None --

-- None -- -- None --

-- None -- -- None --

-- None -- -- None --

Save Cancel

## Text

When the field is Text select the appropriate operator and enter a value. If you want to find any part of a word or sentence use the *like* operator. Text searches are case insensitive.

**List Options**

Filters Columns Other

Field Operator Criteria

Hazard Code equal to xyz

-- None -- -- None --

-- None -- -- None --

-- None -- -- None --

-- None -- -- None --

Save Cancel

## Boolean

When the field is a check box then the only criteria will be True and False.

**List Options** - ✕

**Filters** Columns Other

Field	Operator	Criteria
IsAvailable	equal to	-- None --
-- None --	-- None --	-- None --
-- None --	-- None --	True
-- None --	-- None --	False
-- None --	-- None --	
-- None --	-- None --	

**Save** **Cancel**

Click **Save** when done.



The system will remember your List Filter (on a user by user basis) and show you the filtered list, each time you recall that specific list. To remove the filters, simply click the clear filter icon.