

MYOB EXO tip of the week

Custom Filter Searching

Did you know that you can create your own Custom Filters in MYOB EXO to filter the records displayed in an MYOB EXO search?

If you would like to know how to create your own Custom filters we have included instructions in this document, otherwise please don't hesitate to contact our friendly Software Support team who can assist you with these.

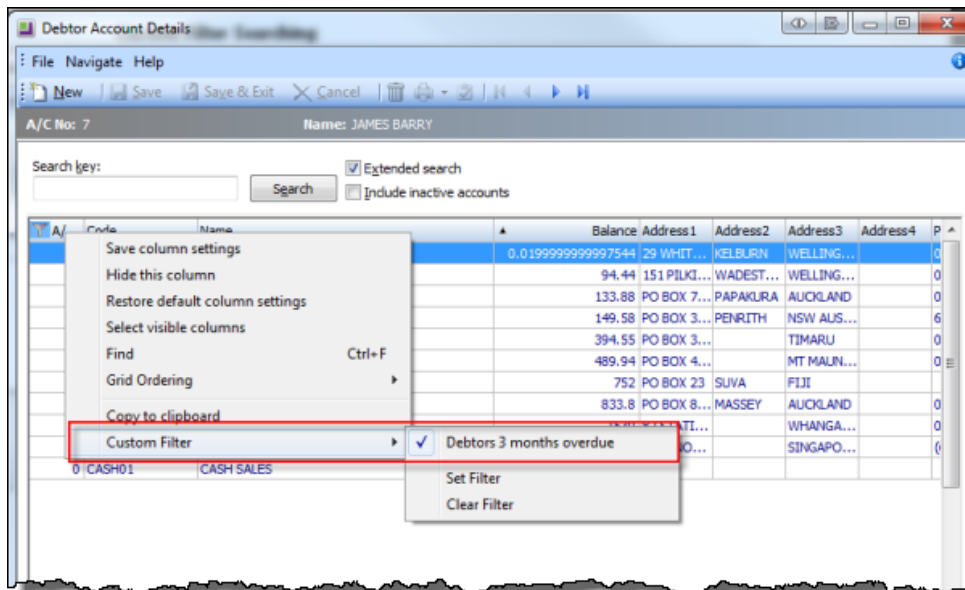
Custom filters can currently be used in Debtors, Creditors, Stock, Contacts, Sales Orders, Stocktake and Job Costing search screen.

For Example:

In the example below we have set up a custom filter in **our** demo database that filters Debtors who have a balance outstanding in the 3 month column.

(N.B This Custom filter will not appear as a menu option in your own system unless it has already been setup as a custom filter)

To access this we open the Debtor Account screen, right click on the column header and choose "Debtors 3 Month Overdue"

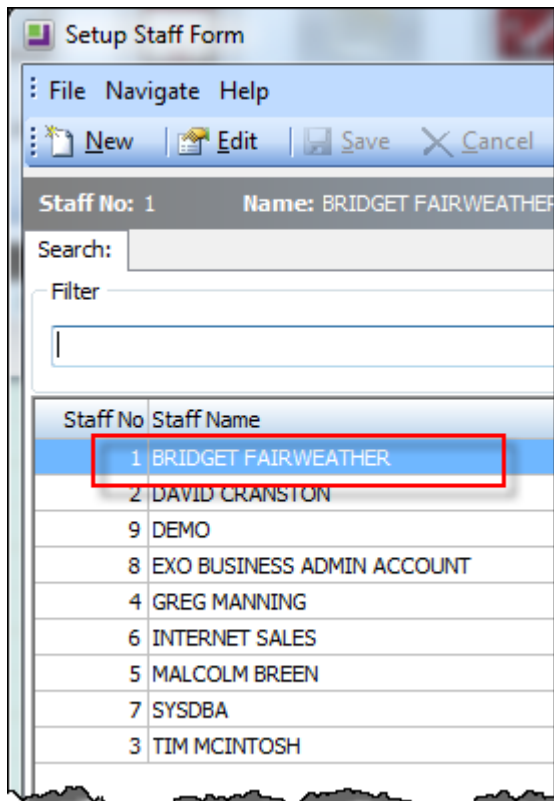
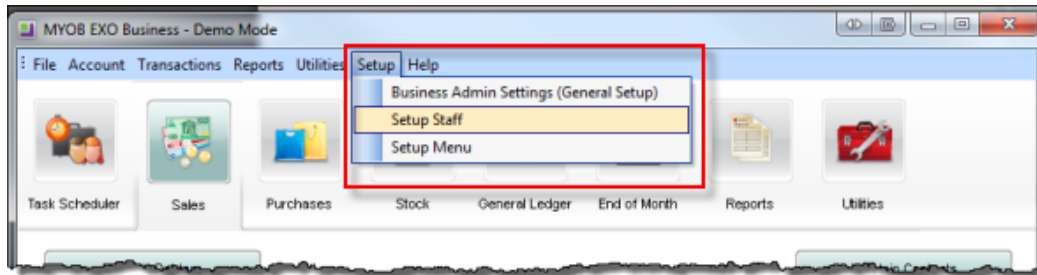


To clear this filter, right click on the column header, drill down to "Custom Filter" and choose "Clear Filter".

Creating a Custom Filter:

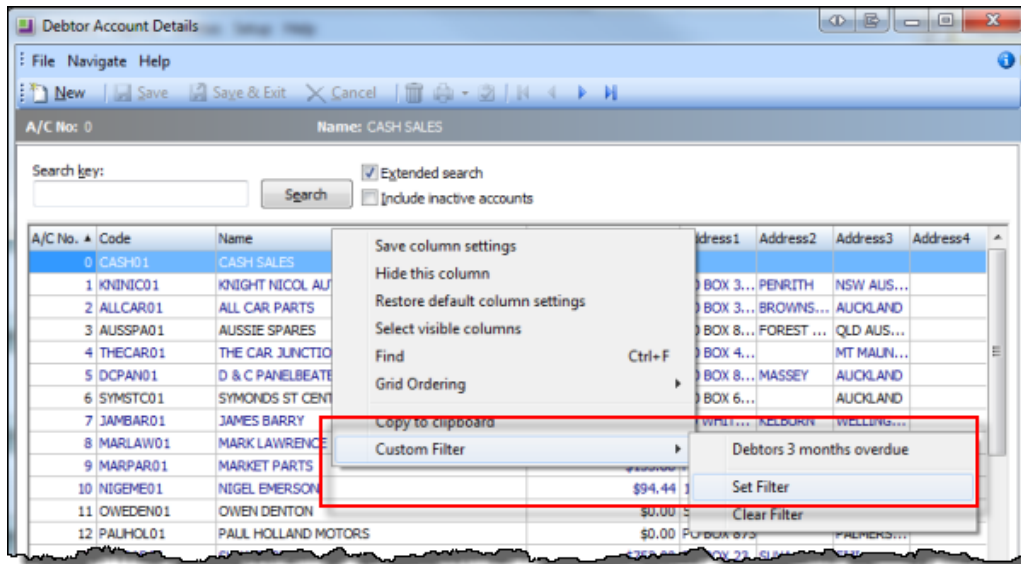
Let's set up a filter that displays the customers that belong to Bridget Fairweather (one of our Sales reps)

Firstly we need to know what Bridget's staff number is.



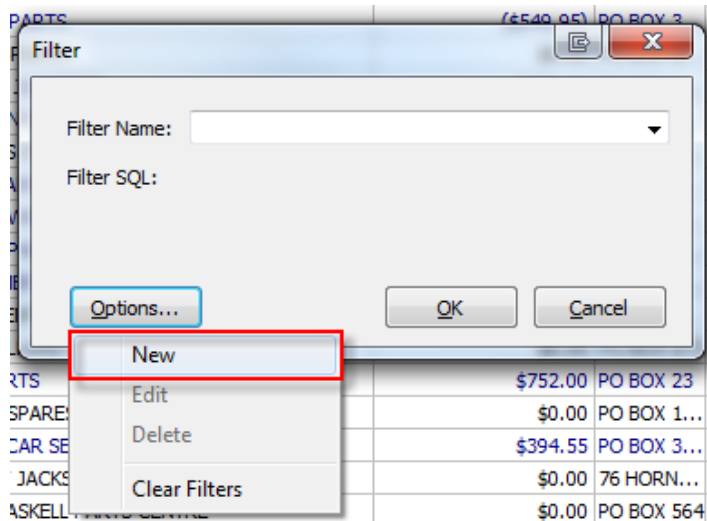
She is Staff No. 1.

Now we go to the Debtor Account screen and right click on the column header and choose "Custom Filter" and choose "Set Filter"

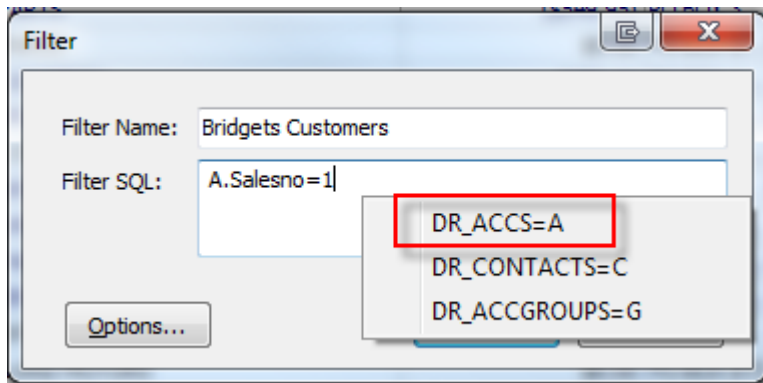


The screen below will pop up:

Choose "Options" then "New"



The Filter name will be Bridget's Customers as this is the information we would like to know. And the SQL Filter will be A.Salesno=1.



Then click ok.

(NB: in order to use the Filter SQL you will need to know the exact Syntax to type in. If you would like help with this please give us a call, we have included some more Syntax examples at the end of this document)

The Debtors screen will now display all of Bridget's Customers

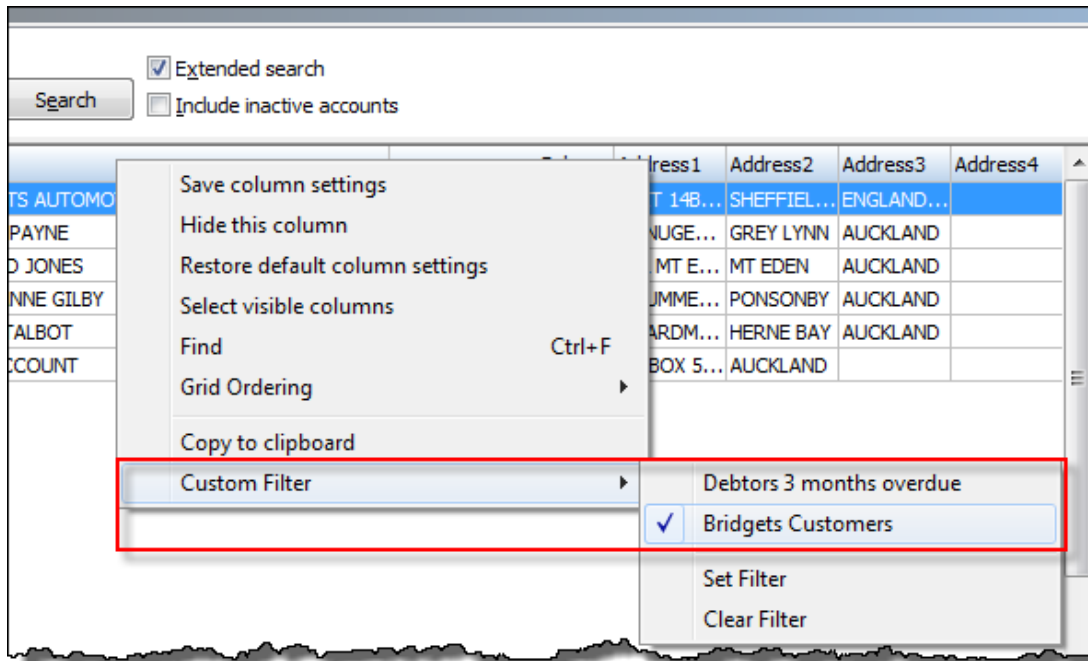
Debtor Account Details

A/C No: 20 Name: ALLPARTS AUTOMOTIVE LTD

Search key: Search Extended search Include inactive accounts

A/C No.	Code	Name	Balance	Address1	Address2	Address3	Address4
20	ALLAUTO1	ALLPARTS AUTOMOTIVE LTD	0	UNIT 1-B...	SHEFFIEL...	ENGLAND...	
23	DANPAY01	DANIEL PAYNE	0	15 NUGE...	GREY LYNN	AUCKLAND	
25	EDWJON01	EDWARD JONES	0	131 MT E...	MT EDEN	AUCKLAND	
28	MARANN01	MARY-ANNE GILBY	0	5 SUMME...	PONSONBY	AUCKLAND	
29	TRETAL01	TRENT TALBOT	0	26 ARDM...	HERNE BAY	AUCKLAND	
30	EXONET6	TEST ACCOUNT	0	PO BOX 5...	AUCKLAND		

If you right click on the Column header in the Debtor Screen and drill down to 'Custom Filter' you will notice that Bridget's Customers filter is now saved.



Custom Filters are stored in the computer's registry, so any custom filters you add will only appear on your own computer.

Below is a list of Filters along with their Filter SQL Syntax that may come in handy for you.

Sample Custom Filters

The following are just a sample of what you can do with custom filters.

Cut and paste the Filter SQL into the FILTER SQL box.

GRID	FILTER	FILTER SQL
Stock Search Screen	Positive stock levels	S.TOTALSTOCK > 0
Debtors Search Screen	Balances 3 Months and Over	A.AGEDBAL3 > 0
Debtors Search Screen	Balances 1 Month + \$1000 and Over	(A.BALANCE – A.AGEDBAL0) > 1000
Debtors Search Screen	All overdue accounts	A.BALANCE > 0 AND A.ACCNO IN (SELECT DISTINCT ACCNO FROM DR_TRANS WHERE TRANSTYPE IN (1,5) AND DUEDATE < GETDATE() AND ALLOCATED = 0 AND ROUND(AMOUNT,2) > 0 AND ROUND(AMOUNTALLOCATEDBAL, 2) > 0)
Job Management Search Screen	Jobs whose value to date exceeds total invoiced	ROUND(J.TOTALVALUE – J.INVOICED,2) > 0
Job Management Search Screen	Jobs with In Progress or Ready to Invoice Lines	J.JOBNO IN (SELECT JOBNO FROM JOB_TRANSACTIONS WHERE LINE_STATUS IN ('C','R'))
Contacts Search Screen	Contact List - Marketing Class # 4	SUB4 = 'Y'