



## **Search Filters Functionality**

### **How to use the new search filters with layouts/grids**

Software Development  
RIMSS Business Systems Technology

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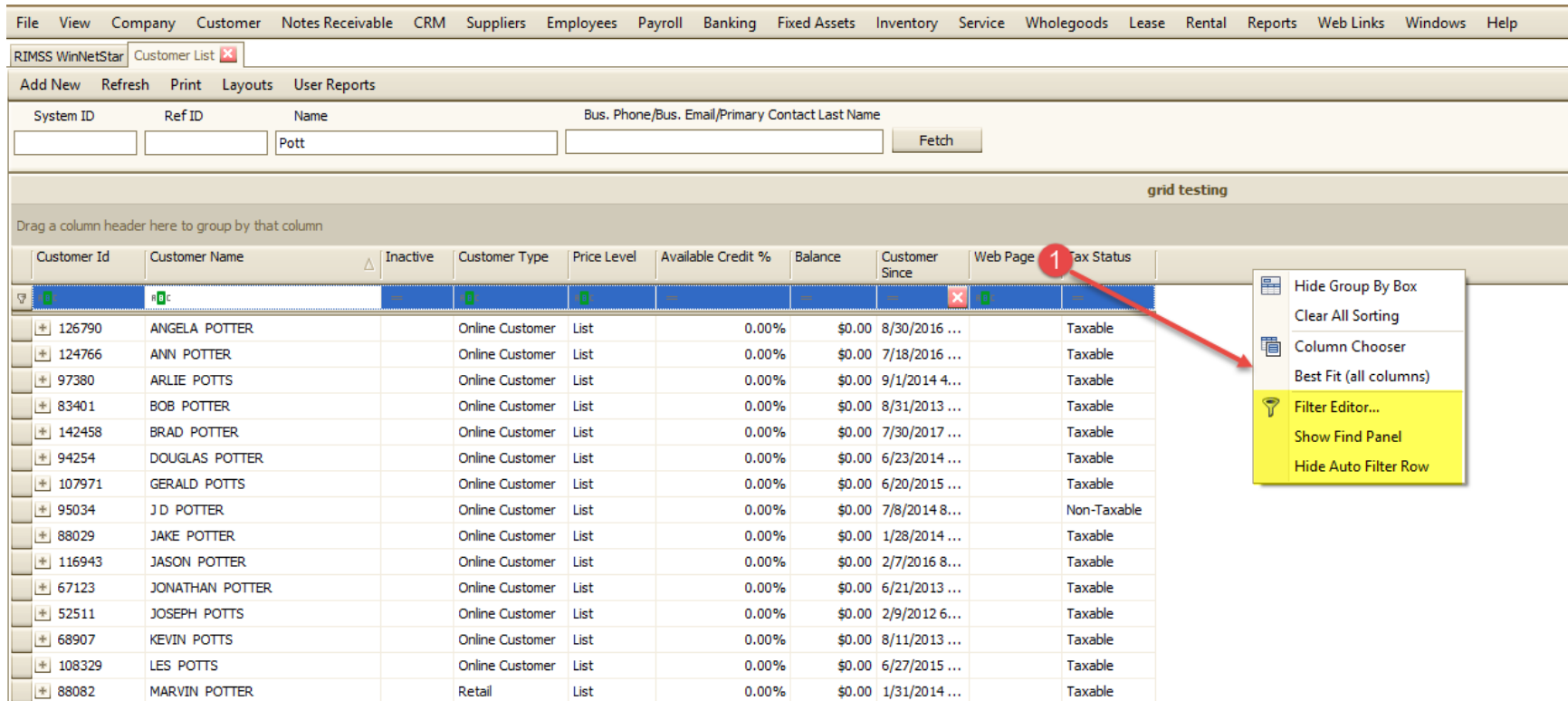
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Post-Fetch grid filters have been updated and changed in the way they can be used and in the options available for filtering.

The Pre-Fetch, Group by, Ascending ▲ and Descending ▼ filters have not change their functionality.

The changes are on the auto-filter row and clicking on the  Funnel filter. You now have different behaviors using the filters on the post-fetch filter row of the grid.

You can access the filter row by right-clicking your mouse on the column header of your grid. See **1** below.





The screenshot shows the RIMSS WinNetStar Customer List application. The interface includes a menu bar (File, View, Company, Customer, Notes Receivable, CRM, Suppliers, Employees, Payroll, Banking, Fixed Assets, Inventory, Service, Wholegoods, Lease, Rental, Reports, Web Links, Windows, Help), a toolbar (Add New, Refresh, Print, Layouts, User Reports), and a search area with fields for System ID, Ref ID, Name (containing 'Pott'), and Bus. Phone/Bus. Email/Primary Contact Last Name, with a 'Fetch' button. Below this is a 'grid testing' section with a prompt 'Drag a column header here to group by that column'. The main grid has columns: Customer Id, Customer Name, Inactive, Customer Type, Price Level, Available Credit %, Balance, Customer Since, Web Page, and Tax Status. A red circle with the number '1' is placed over the 'Tax Status' column header. A right-click context menu is open over this header, listing options: Hide Group By Box, Clear All Sorting, Column Chooser, Best Fit (all columns), Filter Editor... (highlighted in yellow), Show Find Panel, and Hide Auto Filter Row.

Customer Id	Customer Name	Inactive	Customer Type	Price Level	Available Credit %	Balance	Customer Since	Web Page	Tax Status
126790	ANGELA POTTER		Online Customer	List	0.00%	\$0.00	8/30/2016 ...		Taxable
124766	ANN POTTER		Online Customer	List	0.00%	\$0.00	7/18/2016 ...		Taxable
97380	ARLIE POTTS		Online Customer	List	0.00%	\$0.00	9/1/2014 4...		Taxable
83401	BOB POTTER		Online Customer	List	0.00%	\$0.00	8/31/2013 ...		Taxable
142458	BRAD POTTER		Online Customer	List	0.00%	\$0.00	7/30/2017 ...		Taxable
94254	DOUGLAS POTTER		Online Customer	List	0.00%	\$0.00	6/23/2014 ...		Taxable
107971	GERALD POTTS		Online Customer	List	0.00%	\$0.00	6/20/2015 ...		Taxable
95034	J D POTTER		Online Customer	List	0.00%	\$0.00	7/8/2014 8...		Non-Taxable
88029	JAKE POTTER		Online Customer	List	0.00%	\$0.00	1/28/2014 ...		Taxable
116943	JASON POTTER		Online Customer	List	0.00%	\$0.00	2/7/2016 8...		Taxable
67123	JONATHAN POTTER		Online Customer	List	0.00%	\$0.00	6/21/2013 ...		Taxable
52511	JOSEPH POTTS		Online Customer	List	0.00%	\$0.00	2/9/2012 6...		Taxable
68907	KEVIN POTTS		Online Customer	List	0.00%	\$0.00	8/11/2013 ...		Taxable
108329	LES POTTS		Online Customer	List	0.00%	\$0.00	6/27/2015 ...		Taxable
88082	MARVIN POTTER		Retail	List	0.00%	\$0.00	1/31/2014 ...		Taxable

## Auto filter row

Customer Id	Customer Name	Inactive	Customer Type	Price Level	Available Credit %	Wright Customer	Warehouse Address...
107438	WILLIAM A POTTS		Online Customer	List	0.00%		
69054	TERRANCE POTTER		Online Customer	List	0.00%		
40763	STEVE POTTER						
65580	POTTS CREEK FARMS						
POTT20	POTTS CONTRACTING						
55515	Potts & Potts						
54470	POTTS & MONGER SANI						
POTT19	POTTERS TRACTOR SE						
POTT21	POTTER FARMS						
17814	POTTER EQUIPMENT C						
17812	POTTER EQUIPMENT C...						
66111	POTTER CONSTRUCTION		Online Customer	List	0.00%		
POTT10	POTTER COMMUNITY C...		Retail	List	0.00%		

After choosing the Auto filter row, the highlighted row will appear on your grid (it will show different types of filters depending on the grid and column you are searching on). The two most common filter are listed below.


1.  This filter will allow you to search text anywhere within the field.
2.  This filter only returns an exact match of the text input.

## Additional filter options

To change the default filter, click on the filter icon shown and choose the new default filter.

Customer Id	Customer Name	Inactive	Customer T
107438			Online Cust
69054			Online Cust
40763			Retail
65580			Retail
POTT20			Retail
55515			Retail
54470			Online Cust
POTT19			Retail
POTT21			Retail
17814			Retail
17812			Retail
66111			Online Cust
POTT10			Retail
95275			Online Cust
88082	MARVIN POTTER		Retail
108329	LES POTTS		Online Cust

Available Credit %	Wright Customer	Warehouse Address...
0.00%		
0.00%		
100.00%		
100.00%		
0.00%		
0.00%		

You no longer use the \* asterisk to search for text located anywhere in the field. You can choose the  "Contains" filter, and it will find text for you regardless of the position the characters are in.

Add New Refresh Print Layouts User Reports

System ID Ref ID Name Bus. Phone/Bus. Email/Primary Contact Last Name

**grid testing**

Drag a column header here to group by that column

Customer Id	Customer Name	Inactive	Customer Type	Price Level	Available Credit %	Wright Customer	Warehouse Address Postal Code	Balance
* 88029	JAKE POTTER		Online Customer	List	0.00%			\$0.00
* 67123	JONATHAN POTTER		Online Customer	List	0.00%			\$0.00
* 52511	JOSEPH POTTS		Online Customer	List	0.00%			\$0.00
* 95034	J D POTTER		Online Customer	List	0.00%			\$0.00
* 116943	JASON POTTER		Online Customer	List	0.00%			\$0.00
* 132687	JIMMY POTEET		Online Customer	List	0.00%			\$0.00
* 142858	JERRY POTEAT		Online Customer	List	0.00%			\$0.00
* 66503	POTOMAC PROJECTS PLUS		Online Customer	List	0.00%			\$0.00

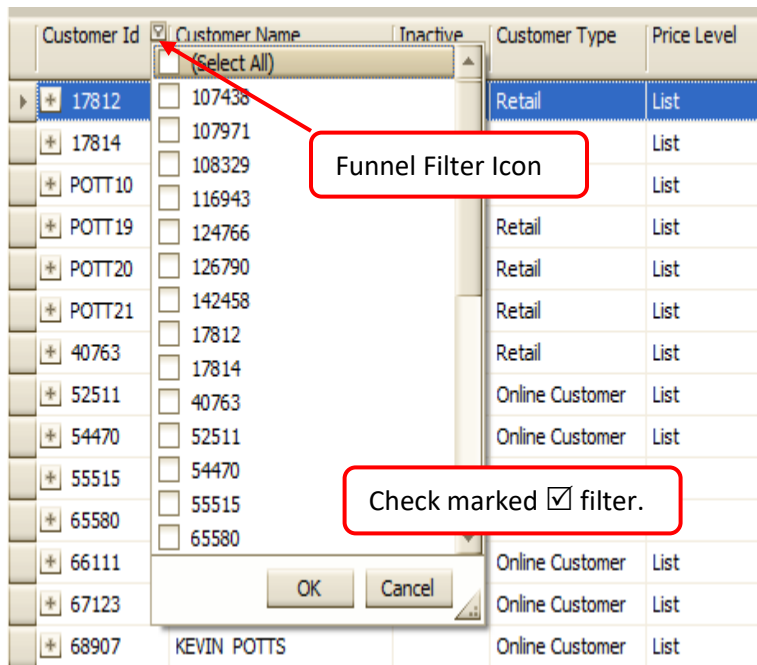
**NOTE:** All filters will remember the last selection you used for the grid and will default to that selection in the future. The new selection will be used as the default until you change it.

Next, the Funnel filters  can perform other search types when pressing the **LEFT** mouse button:

The funnel filter will display a few different menus, depending on the type of column you are doing a search

### 2.1 Check marked filter

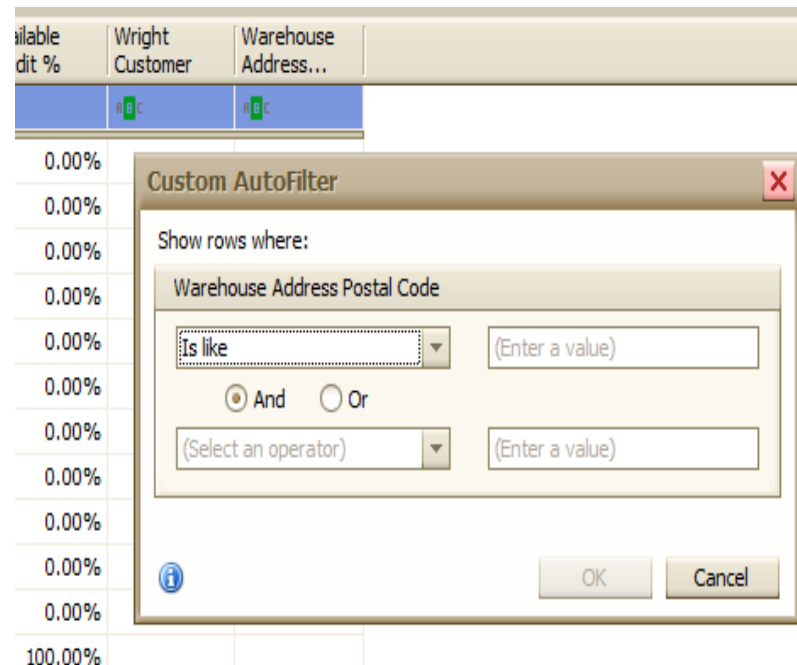
You can select all, or some, or one of the options shown inside the drop down menu and click OK. You will only have the rows of the items you check marked  before.



Customer Id	Customer Name	Inactive	Customer Type	Price Level
17812	107438		Retail	List
17814	107971			List
POTT10	108329			List
POTT19	116943		Retail	List
POTT20	124766		Retail	List
POTT21	126790		Retail	List
40763	142458		Retail	List
52511	17812		Online Customer	List
54470	17814		Online Customer	List
55515	40763			
65580	52511			
66111	54470			
67123	55515			
68907	65580		Online Customer	List
	KEVIN POTTS			

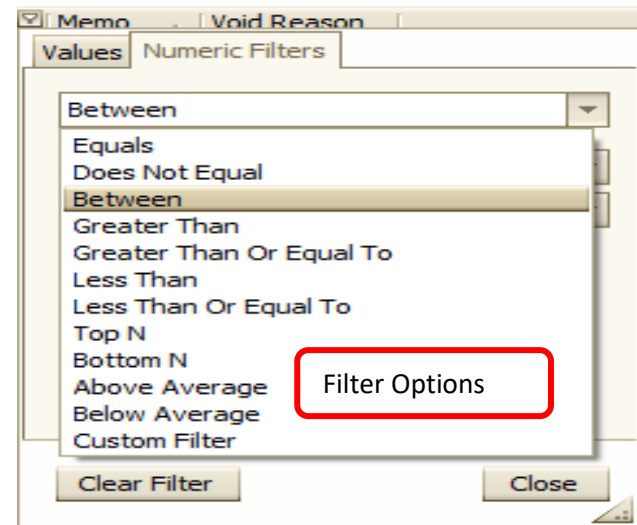
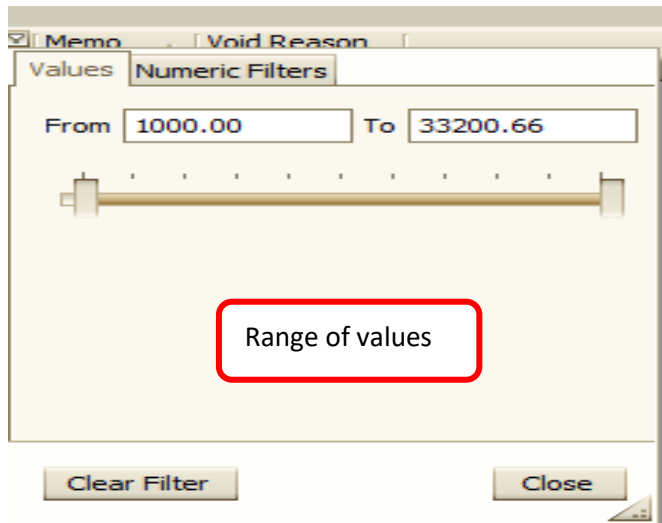
### 2.2 Custom Filter

Custom filter menu allows you to design your own search parameters. (Contact RIMSS support if help is needed)

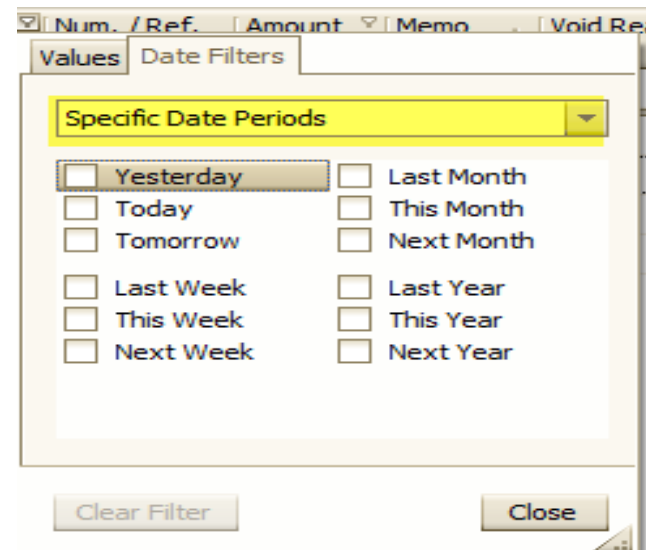
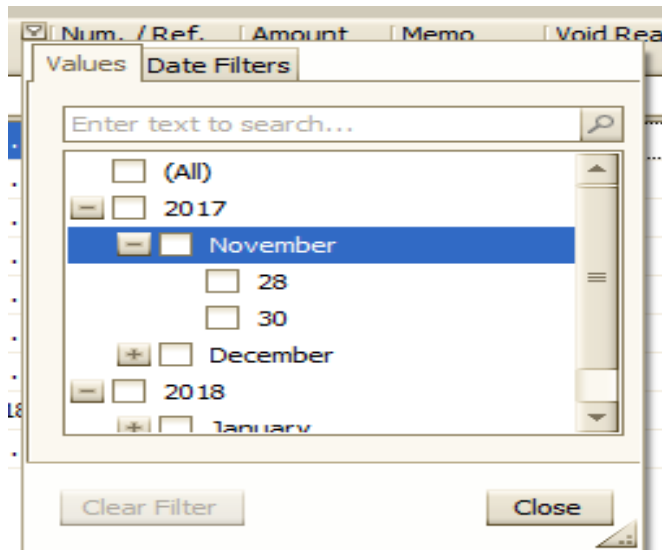


Available	Wright	Warehouse
dit %	Customer	Address...
0.00%		
0.00%		
0.00%		
0.00%		
0.00%		
0.00%		
0.00%		
0.00%		
0.00%		
0.00%		
0.00%		
0.00%		
0.00%		
0.00%		
0.00%		
0.00%		
0.00%		
0.00%		
0.00%		
100.00%		

### 2.3 Values/Numeric Filters



### 2.4 Date Filters



## 2.1.5 Values/Text Filters

