sales-i SELL SMART

sales-i.com/support

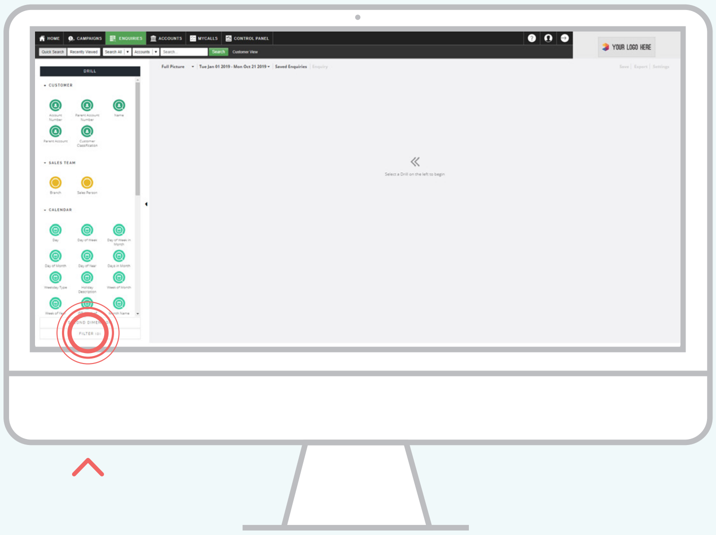
How To Add Additional Filters To An Enquiry

Desktop

Adding filters allows you customize your enquiry report to only show or exclude certain accounts, transactions, products, or any other analysis field.

01 SELECT FILTER

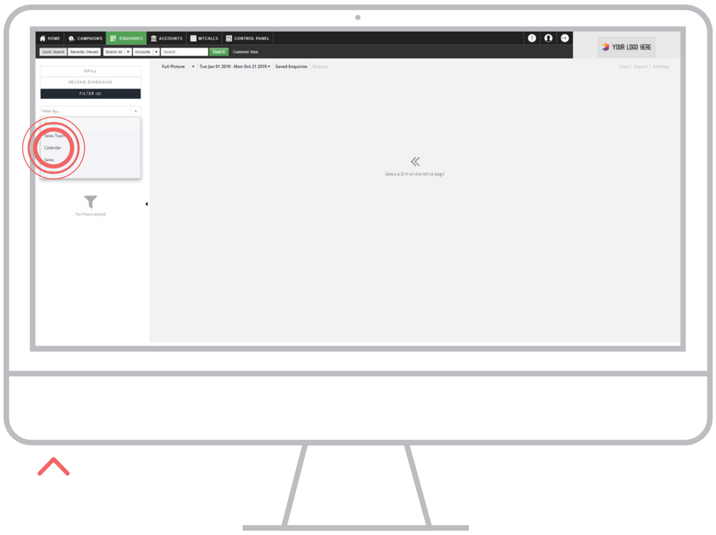
Select Filter at the bottom of the drill menu



02 SELECT ANALYSIS CATEGORY

In the Filter By drop down menu select the Analysis Category you'd like to filter by.

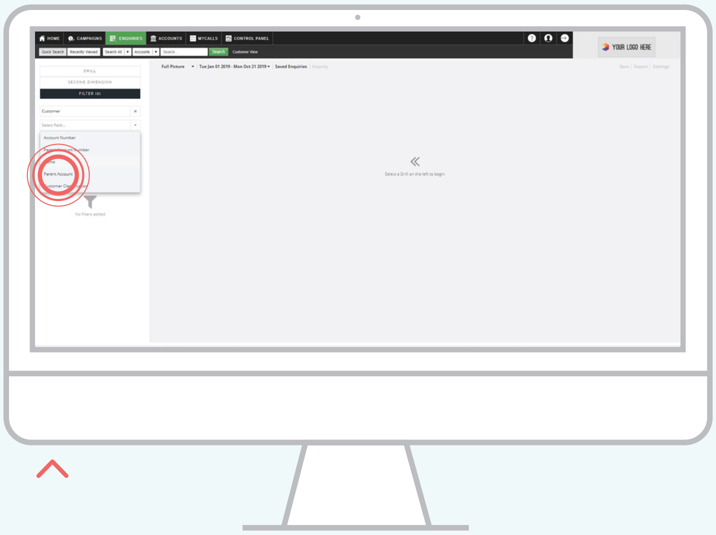
In this example, select Customer.



03 SELECT FILTER MENU

In the select Filter drop down menu select the field within the category you would like to filter by.

In this example, select Parent Accounts.

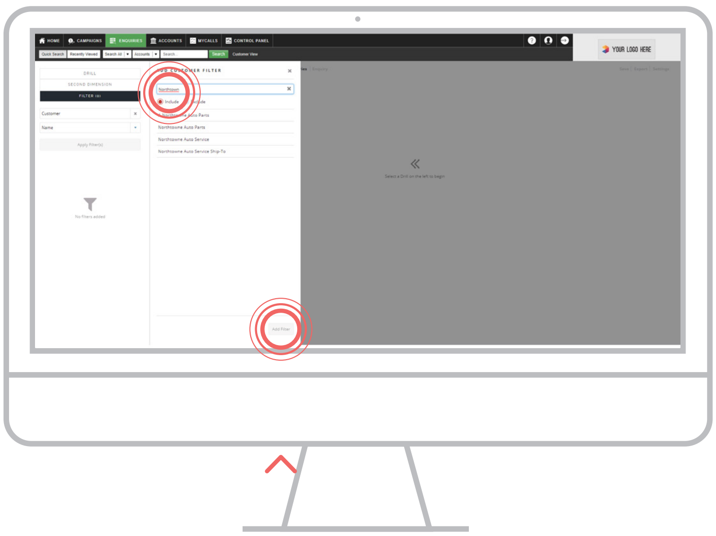


04 ADD FILTER

Search for the account by name, or scroll through the list selecting the items to filter.

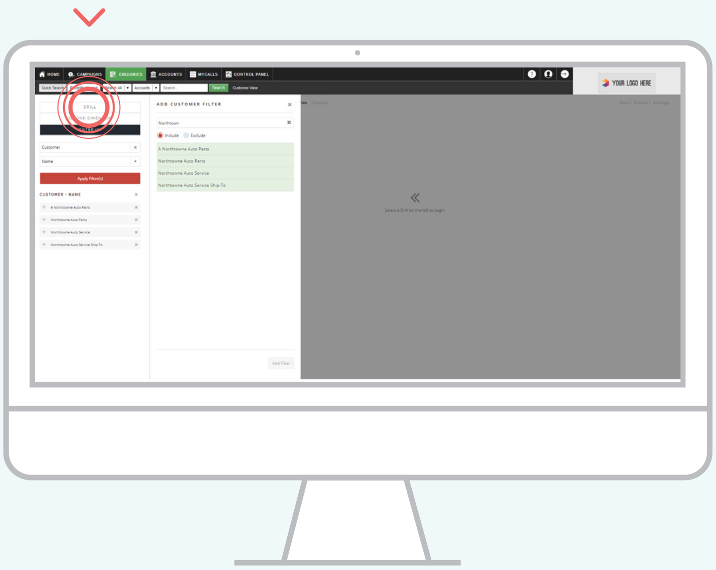
Additionally, select if your chosen items are 'Included' (show only those selections), or 'Excluded' (show everything except the selected items).

When all items are selected, click Add Filter at the bottom.



05 DRILL

Once all Filtered items have been added, click Drill to begin building your enquiry.



06 ENQUIRY BUBBLE

Select the Enquiry bubble to view sales data and an enquiry report.