

How To Add Additional Filters To An Enquiry

Android

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



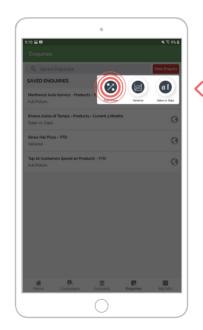
Tap New Enquiry at the top of the page.



02 REPORT TYPE

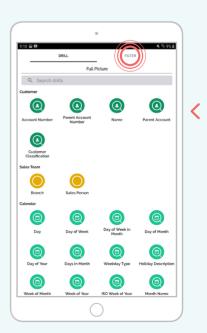
Select the report type you'd like to view.

For example, tap on Full Picture.



03 DRILL FILTER

At the top of the page, toggle the menu from Drill to Filter.



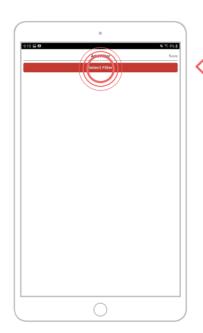


Tap Add Filter.



Tap Select Filter.

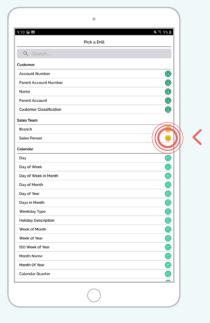




06 FILTER FIELD

Choose the analysis field to filter by.

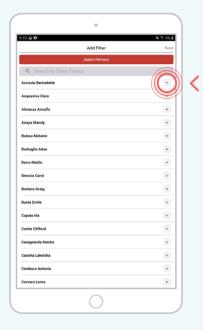
For example, tap on Sales Person.



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07 FILTER ITEMS

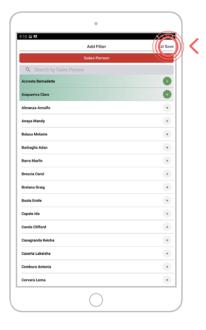
Search for the items to filter on, or scroll through the list, tapping on items to include in the filter.







Click Save when all items have been selected.



O9 ADD ANOTHER FILTER

Add an additional filter, or toggle to mark selected items as included or excluded from the report.

When the filter is complete, tap Pick Drill.



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10 SELECT FILTER

Select a bubble to drill into the filtered report.

For example, tap on the Name bubble.





The report will appear.

