MYOB Exo Business White Paper

Custom Filters

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Overview

A custom filter is a highly customised filtering mechanism that can be used to filter the records displayed in MYOB Exo Business grids. It is a common method now available to many search grids within Exo Business. Custom filters provide the following benefits:

- A customised search feature providing a more standard search selection.

- Variety of combinations of search selections to help produce a smaller and more particular choice of records than that allowed by normal search selections.

- Allows to save and store the custom search filters within the Exo Business grids that can be switched back and used at anytime.

Custom filters are currently available in Debtors, Creditors, Stock, General Ledger, Contacts, Sales Orders, Job Costing and in a slightly different fashion in Stock Take.

Using Custom Filters

Custom filters function like simple WHERE clauses in SQL. They are set up by adding a set of SQL database commands, which must be in a valid SQL syntax. With custom filters, you are adding your own SQL database commands to be more selective.

The way a field is used in a custom filter query is determined by the type of data. Text fields use text style operators, whereas numeric and currency fields use arithmetic operators.

- Text operators allow the exact matching of a field to another piece of text (that you supply), or a partial match. Wildcards can be used to allow the matching of text within a text field (e.g. finding certain words or numbers within a stock item description).

- Numeric operators also allow an exact match, but differ from text fields for partial matches. Typically, a numeric field will be selected by testing it against a range using the greater than (">") or less than ("<") operators.

For both text and number/currency fields you can combine several conditions together using the AND and OR operators. You can also combine text and numeric/currency fields in the same custom filter.

Custom Filters in Stock Take

Utilities > Stock Utilities > Stock Take

The following section elaborates with an example, the use of custom filters in stock take.
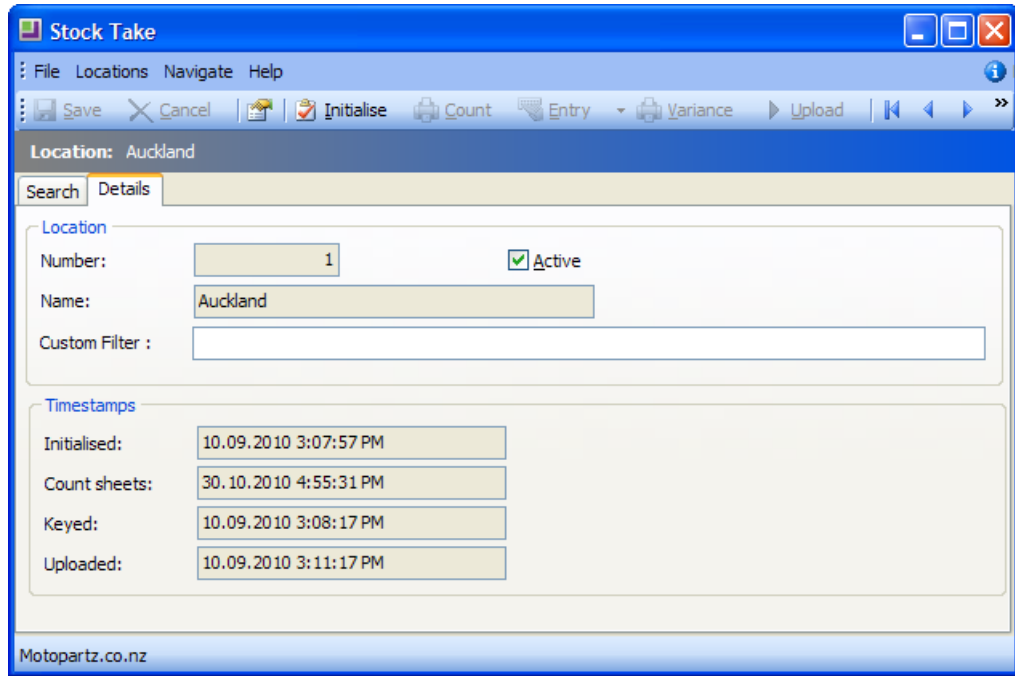
The **Custom Filter** option lets you add your own SQL database commands to be more selective on the stock take. The custom filter must be valid SQL syntax, and is in the form of SQL added to a WHERE clause. The columns or fields filtered on can be text, numeric or currency types.

> **Note:** The custom filter works **in addition** to any selection you have made on the Stock Take window to select a stock group or supplier. For example, you have restricted your selection to a certain supplier, the custom filter will only find items from that supplier that match your custom filter.

The simplest form of custom filter uses selections of fields from the STOCK_ITEM database table. Some of the columns in this table that you might like to include in the customer filter are as follows:

STOCKCODE	Stock item code (text)
DESCRIPTION	Stock item description (text)
STOCKGROUP	Main stock group – (numeric)
STOCKGROUP2	Secondary stock group – (numeric)
SELLPRICE1	First sell price – e.g. "Retail" (currency)
SELLPRICE2	Second sell price – e.g. "Trade" (currency)
AVECOST	Average cost price (currency)
MINSTOCK	Min stock reorder level (numeric)
MAXCOST	Max stock reorder level (numeric)

SUPPLIERNO	Suppliers account number (numeric)
MONTHUNITS	Unit turnover this month (numeric)
YEARUNITS	Unit turnover this year (numeric)
LASTYEARUNITS	Unit turnover last year (numeric)
BINCODE	Bin location (text)
BARCODE1	First barcode (text)
BARCODE2	Second barcode (text)
BARCODE3	Third barcode (text)
TOTALSTOCK	Current stock level across all locations (numeric)

The fields STOCKGROUP and STOCKGROUP2 are the internal numeric code used for the Stock Groups. To find the numeric code you will need to look on the setup window for Stock Groups. The SUPPLIERNO field is the account number for the supplier.

Example Filters

Below are some examples of custom filters for text fields. Note that the filter must be entered exactly as shown below, including the quote marks where shown.

DESCRIPTION = '4 INCH PLOW BOLT'

This filter will only find items where the item description is exactly "4 INCH PLOW BOLT". If there are any extra characters in the item description, even an extra space it will not match it.

DESCRIPTION LIKE '%PLOW%'

This will match any stock item that has the word "PLOW" anywhere in its description regardless of whether the word appears at the start, middle or end of the description.

DESCRIPTION LIKE '%BOLT'

This will find items that have the word "BOLT" at the end of the description. If the word "BOLT" is at the start or middle of the description it will not be matched unless it is the only word in the description.

Here are some examples for numeric and currency fields:

SELLPRICE1 > 99.99

This will find items that have a first sell price ("retail") of more than $99.99.

TOTALSTOCK <> 0 AND SELLPRICE >= 100.00

This will find items that do not have a zero stock level, and also have a price of greater or equal to $100.

STOCKGROUP=6 OR STOCKGROUP=51

This will find items in either group 6 or group 51.

Finally, here are some examples that mix both text and numeric fields:

DESCRIPTION LIKE '%PLOW%' AND SELLPRICE1 > 9.99

This will find items that have the word "PLOW" in the description and also have a first price greater than $9.99.

(DESCRIPTION LIKE '%PLOW%' AND SELLPRICE1 > 9.99) OR (STOCKGROUP = 51)

This will find items that fall into either or two distinct categories – either they match "PLOW" and cost more than $9.99 or they are in group 51. Note the use of the brackets around each side of the OR operator when there are multiple clauses on one side or the other.

Custom Filters in Debtors

The custom filters are also available in Exo Business grids – Debtors, Creditors, General Ledger, Contacts and Sales orders. This custom filter is in a slightly different fashion from stock take. The following section illustrates the one in Debtors.

Account > Debtors

1. Click **Search** on the Debtors window and right-click on the column headings.

2. Select **Custom Filter > Set Filter** from the right-click menu to set up new filters for the data search.

> **Note:** You cannot see the **Custom Filter** option without having records in the Debtors window—you must click **Search** first to display some records.
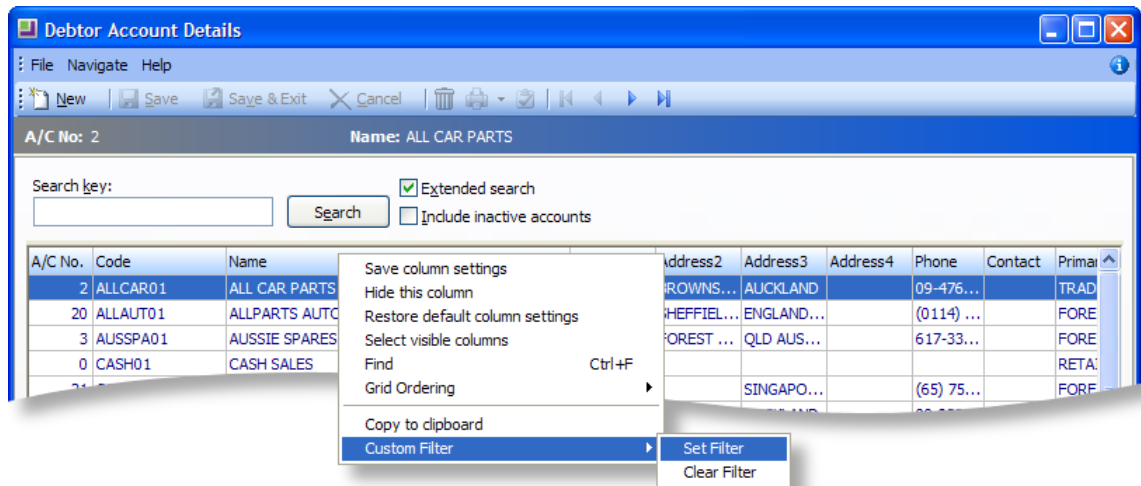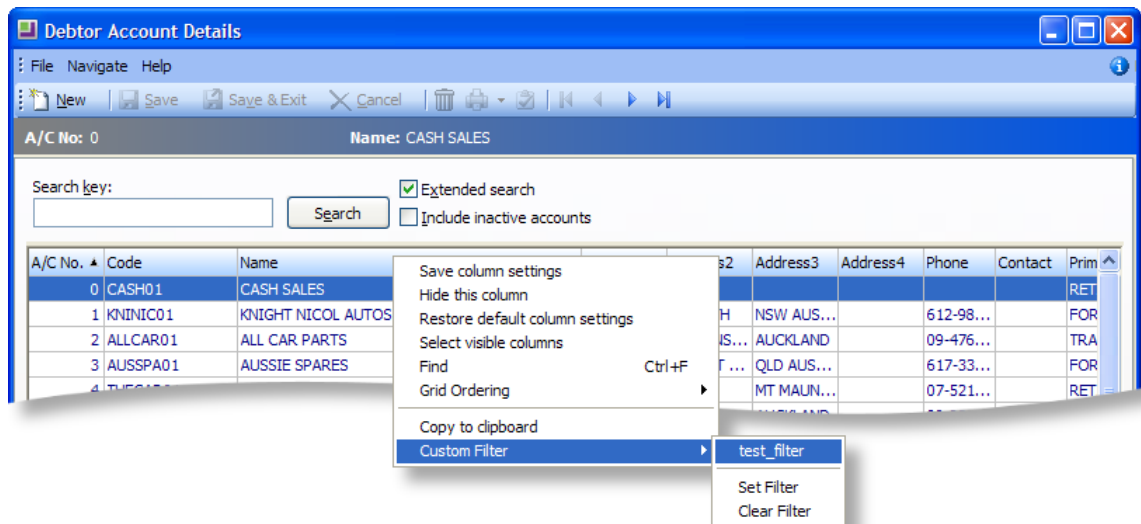
3. Click **Options > New** to create a new filter. This makes the fields on the Filter dialog editable.
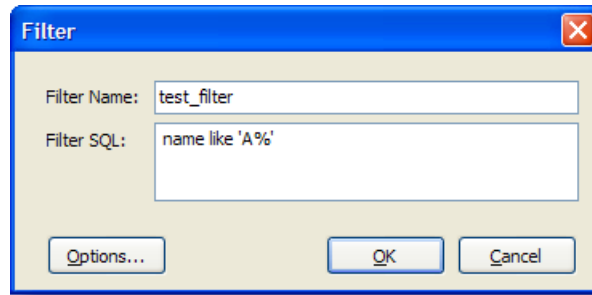
4. Enter the **Filter Name** and **Filter SQL** the condition or value that you want to base your data filter.

5. Click **OK** to save the new filter.

The new custom filter now appears on the right-click menu:

With custom filter, you can also filter data by using more than one value or conditions in the SQL Filter. For example, in the screenshots below, custom filter retrieves data based on two or three SQL filters specified.
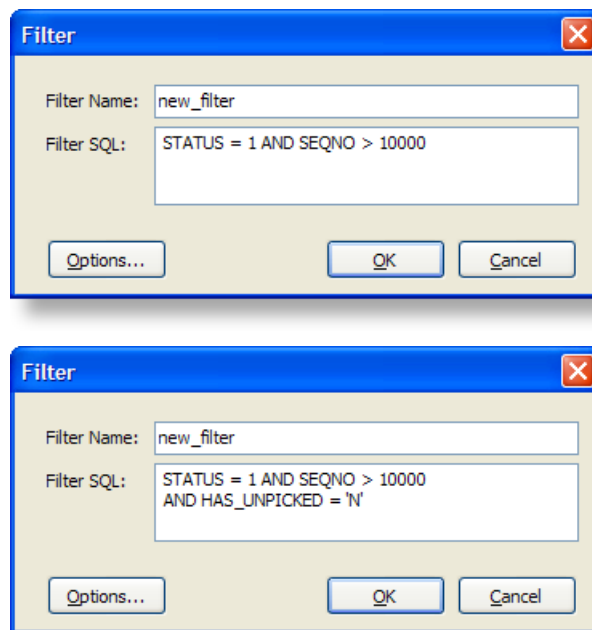
It also allows SQL statements with AND or OR conditions enabling a selection search in an Either OR fashion. This helps user to get a very confined extract from vast amounts of data.

Apart from the debtors, these custom filters are also present in other Exo Business grids, such as Creditors, Stock, General Ledger, Contacts and Sales Orders and Job costing. They appear in a similar fashion and operate in a similar way as detailed above.

Note: Custom Filter SQL function that allows a user to key in search selection criteria has been added to the Debtor Statements, Invoice Batch Printing, and Creditor Remittances screens.