

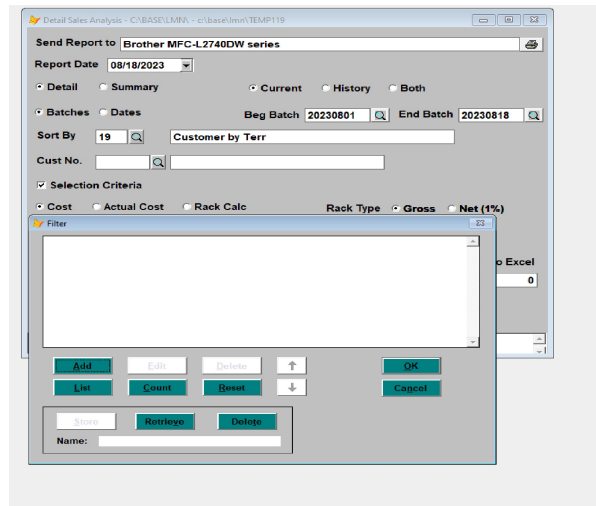
## Selection Criteria

Most of our reports have the option for Selection Criteria. This feature allows you to filter the records you want. We already have date and batch ranges but you can fine tune the report even more by selecting records that meet additional criteria. Some Examples might include:

Show one customer or a list of customers on this report. Custno=Blue

Show the Gasline Department only. Department=1

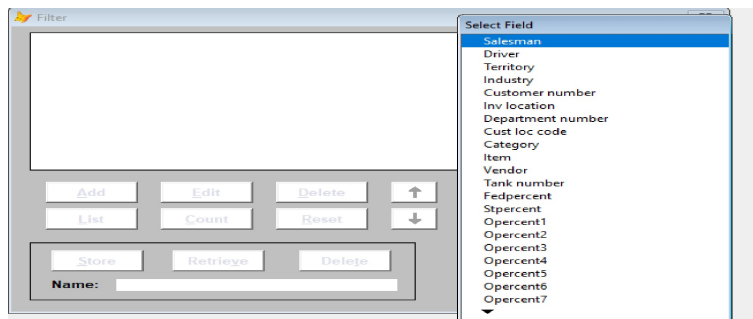
Show a report for one vendor only. Vendor=Valero



**Figure 1** Click on Selection Criteria

So once you click on the option for Selection, the screen above pops up. The most commonly used options include:

- Add** You can add filters like item=E87
- Reset** Clear the selections and start over.
- Delete** Delete a line on selection
- Store** Save this to a template so you can call it up automatically next time.
- Retrieve** Retrieve the template so you don't have to type the selections again.



**Figure 2** Press Add and a list of fields pops up

### Add a Selection Line by Selecting Fields.

You press the **Add** button and a list of fields comes up. You could select Department Number to see all items in department 1 or Inv Location to see all sales from location 9. You can add multiple selection lines. Example: Dept=1 .and. Vendor=Valero or Item=E87 .or. Item=E93. When doing the same field, use OR not AND.

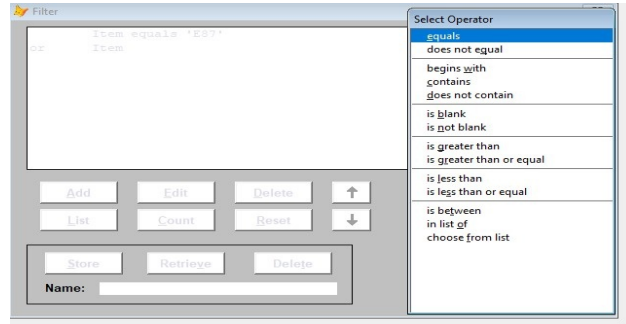


Figure 3 Select Operator

Equal is the most popular **operator**. As the examples above suggest. The option for INLIST lets you enter a list of things to select. See the example below. Once you select an operator, then you will enter the value.

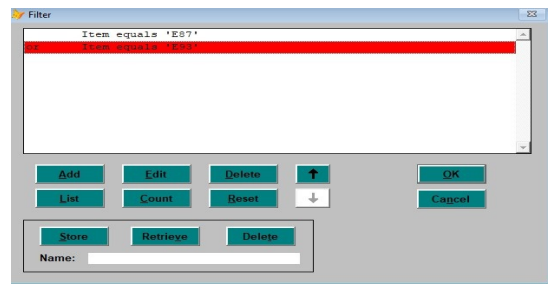


Figure 4 Selection for 2 inventory items

In the above example, the fields selected was item, the operator was **Equal=**, and the **value** was E87. "OR" was used to do another line for another item Equal to E93.

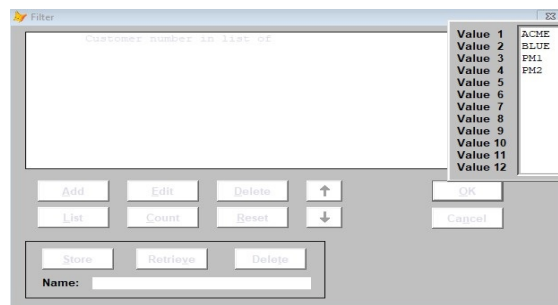
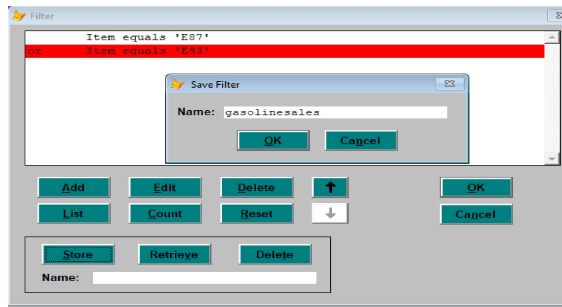


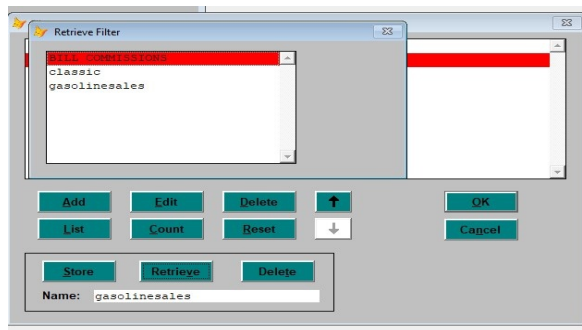
Figure 5 Use inlist for a list of Customers

In the example above, the Inlist operator was selected and a list of customers was typed in. That is a report for a range of dates/batches but only for those 4 customers.



**Figure 6** Save your selections for next time

So you spent 5 minutes crafting the perfect selection criteria. Now click on the **Store** button to save it for next time. This one was named “gasolinesales”. Next time you do this report, you can click on the **Retrieve** button to automatically bring up your favorite selection criteria template. See example below.



**Figure 7** Retrieve your saved templates

Click on the **Retrieve** Button and it shows you all the Selections you saved. There are 3 of them to choose from in the example above. You see “gasolinesales” which was created above. Highlight a name and press enter. Then press **OK** button to go back to the report.

The List and Count options do not work well because they do not use the rest of the criteria that we have for batches, dates, etc. However, always display the report on the screen first so you can see what it looks like before printing. You want to make sure you got the 10 page report you were looking for and not the 400 page report that displayed because you accidentally entered the wrong batch range. If you like the resulting report, you can print the report from the screen display using the Print Button above.