

## Filter (Line Item Reports Only)

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Once a report is generated, the **Filter** function allows a user to narrow the line items displayed by setting filter criteria. For example, the filter is useful on the Amount column to narrow the report to see only amounts greater than a certain dollar amount.

The Filter option is only available on Line Item reports.

## Set Filter

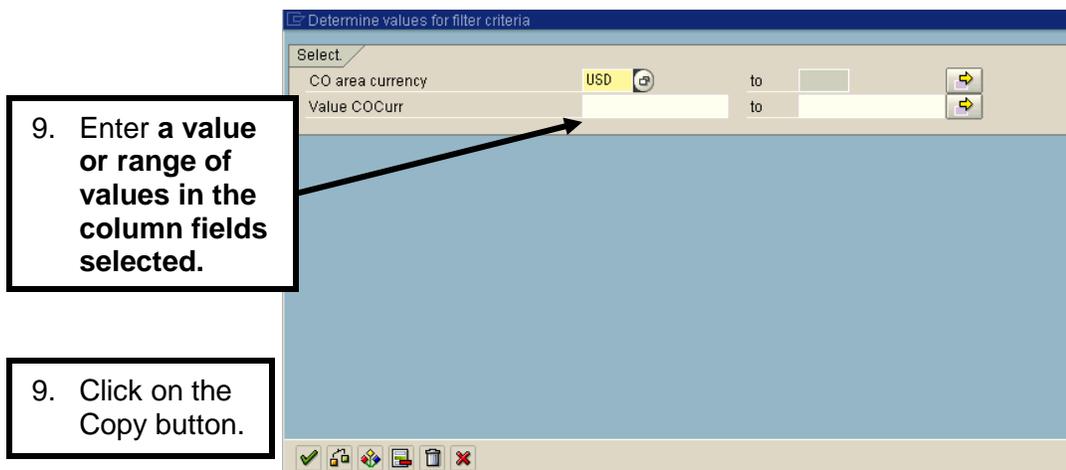
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1. **REQUIRED:** Click on **at least one** or more column headings to select the columns to use as the filter criteria (e.g. amount).

*Note:* To select more than one column, you must hold the **CTRL** key down while selecting the column headings. If **no columns are selected, a different window will appear which allows you to select columns from a list on the right side of the screen.**

2. Click on the  **Set Filter** button (**Ctrl+Shift+F2**) or follow the menu path: **Edit** → **Set filter**.

### In the *Set filter* dialog box:



3. Enter the range of amounts or other filter criteria (e.g. to view only amounts of \$1000.00 and above, enter **1000 to 9999999**).

*Note:* Use the  **Multiple Selection** button to enter more than one value or range of values for a field if needed.

4. When filter criteria is set, click on the  **Copy (Confirm)** button or press **Enter** to exit the dialog box.

*Note:* The  **Filter** symbol now appears in the upper right corner of the report with the word **Active** beside the button.

## Delete Filter

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1. To delete the filter, click on the column heading (with the filter symbol) and follow the menu path: **Edit** → **Delete filter**.
2. Review the report showing that the filter is inactive as follows:
  - All line items or rows are now displayed
  - The  **Filter** symbol with the word **Active** in the upper right corner of the report **no longer is displayed**

*Note:* The menu path above is the most efficient way to delete the filter with the fewest key strokes and **automatically deletes the filter**.  
The filter can also be deleted by using the  **Set Filter** button again and using the  **Delete filter** button to delete the filter.