PROCEDE TESTING FAQ

February 16

ADVANCED FILTERS / SMART FILTERS

- Filtering options within Excede are vast. Through Advanced Smart Filters we are able to input SQL queries that go
 far beyond the fields currently present.
- By using the Help (F1) feature in Excede you can access a number of prewritten SQL queries that you can copy and paste and save into your Smart Filters. Simple search "Advanced Filters" within the Help menu in Excede and then double click on "advanced filters from user group".

📑 Excede Help v10.	1					
Hide	< ⇒ Back	⇒ Forwa	Ird	C Refresh H	forme Print Pr	cocede Customer Pontal
Contents Index Se Type in the word(8) to be	arch Favortes			Parts Departmer	t Advanced Filters	
advanced filters			~ >	Folder	Goal	Advanced Statement
\frown		List Topics	Display	Front Counter Orders	All front counter orders with non-stock misc parts on them	SLSID IN (SELECT SLSID FROM PTSLSITM WHERE ITMTYP = 533)
Select topic:		Found:	34 Bank	Back Counter Orders	All back counter orders with non-stock misc parts on them	SLSID IN (SELECT SLSID FROM SVSLSITM WHERE ITMTYP = 597)
Smart Filter Concepts Search Results - Optin Smart Filtering - Find R	nize lecords	Excede Help v10.1 Excede Help v10.1 Excede Help v10.1	1 2 3	Front Counter Orders	All front counter orders that have back ordered parts that are not on an associated purchase order	SLSID IN (SELECT SLSID FROM PTSLSITM WHERE QTYBACKORDER >0 AND ITMID NOT IN (SELECT ITMID FROM PTPURSLS) AND ITMTYP = 528)
Backorders Search Concepts		Excede Help v10.1 Excede Help v10.1 Excede Help v10.1	4 5 6	Parts Adjustments	Find all adjustments where there is a part where binid1 an binid2 are different	ADJID IN (SELECT ADJID FROM PTADJITM WHERE PTITM IN (SELECT PRTID FROM PTPRT WHERE BINID1 $<>$ BINID2))
advanced filters from u Assign Bin Localisms to	es ests Parts	Excede Help v10.1 Excede Help v10.1 Excede Help v10.1	8	Any Document with "CusId" field (customer record,	Customer is associated with an outside salesperson (role of	CUSID IN (SELECT CUSID FROM COCUSCRM WHERE EMPID IN (SELECT
Company Department Filter - Zero Average C Create Labor Prices	lcons lost	Excede Help v10.1 Excede Help v10.1 Excede Help v10.1	10 11 12	Front Counter, Back Counter, etc.)	'Parts Consultant' of employee record)	EMPID FROM COEMP WHERE ROLE = 626))
Update Labor on Serv Reverse Service Orde Journal Entry Concept	ice Orders rs s	Excede Help v10.1 Excede Help v10.1 Excede Help v10.1	13 14 15	Front Counter or Back Counter	Front Counter or Back Counter Orders where customer is associated with a specific	USID IN (SELECT CUSID FROM COCUSCRM WHERE EMPID = 'XXX')
Filter - Unused Reman	Parts	Excede Help v10.1	16	orders	employee	

- If there is an Advanced Filter that you are interested in, simply copy the "Advanced Statement" from the help document by highlighting the text, right-clicking, and selecting Copy.
- Then, go into the Smart Filter in the corresponding area in Execede, open Smart Filters, and click on the Advanced>> button:

											3	nart Filter : Pa	rts Orders				
Filter orward Neviation	нар ВЗ Э Сору С	< 🛱	Save Doe	Export Selection Export Filtered R Export Entire Re extions	to Encel esults cordset	I ØRefres ⊕Reset ⊕Reset	h Window Smart Filter Open Create Notes Notes Notes Pot	at Field	di Print Preview Berry Brit Preview Seer Print But Preview Print Preview	C Help (F)		Standard	C ALL			ALL	
lavigation										10275 or 1							
		a,										Status	Salesperson		Bill-To Customer		
										G		ALL		q			
												Part			Bill-To [Customer Id]	Order	
			x102000402	PWHL	10750	REAGE SI	mart Filter : Parts Orders			×				0	0		
			x102000401	PWHL	11365	PHOEN								4	4		
						PHOEN	Standard			22		Cus PO	Туре				
			x102000400			PHOEN	Y 1,000 ALL		• All	• 22				Q,	Date Create		
Customers						DURHA									From		
Q Employees						PHOEN		B		22					•		
Q Lookup [Translation]		00				MADIS	ALL -	ч.									
Q Shirts						NEW H		q	Q.								
G Tru Codes		100				BIRNE						Reset All	Normai <<		Арріу	Cancel	нер
A Tex Authorities						NORTH		٩	Date Create			Where					
O Term Coder						NORTH						where					
A Vendors						BEAVE											
Postal Codes						HARRIS	Reset / Advanced >>		Apply Cancel	Help							
0.0			x102000391:01	PRET	10463	DURHA				17							
							\sim					Save	Delete Saved				
																NIT IN ADDRESS	

 Then, paste the copied text into the "Where" box and hit Save. You will then be asked to name the search so that you can find it in the Saved drop-down box for future searches.

** It is also possible for you to write your own smart filters, through this can be very tricky if you don't know SQL. Through the same Help search I mention above you can find more information on this if you are interested. <u>Or you can</u> reach out Stacey Bruce if there is a filter you would like created.