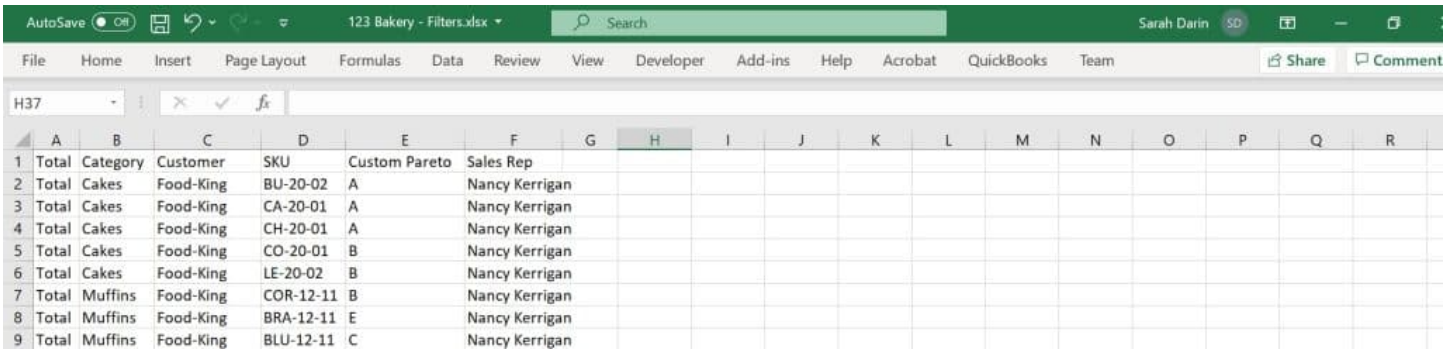
Custom Filter Fields

Optional Data · https://www.forecastpro.com/documentation/forecast-pro-trac/optional-data/custom-filter-fields/

> Forecast Pro TRAC only

You can define custom filter fields which can be included in the report views and filtered like any other fields. They can also be included in the numeric output file.

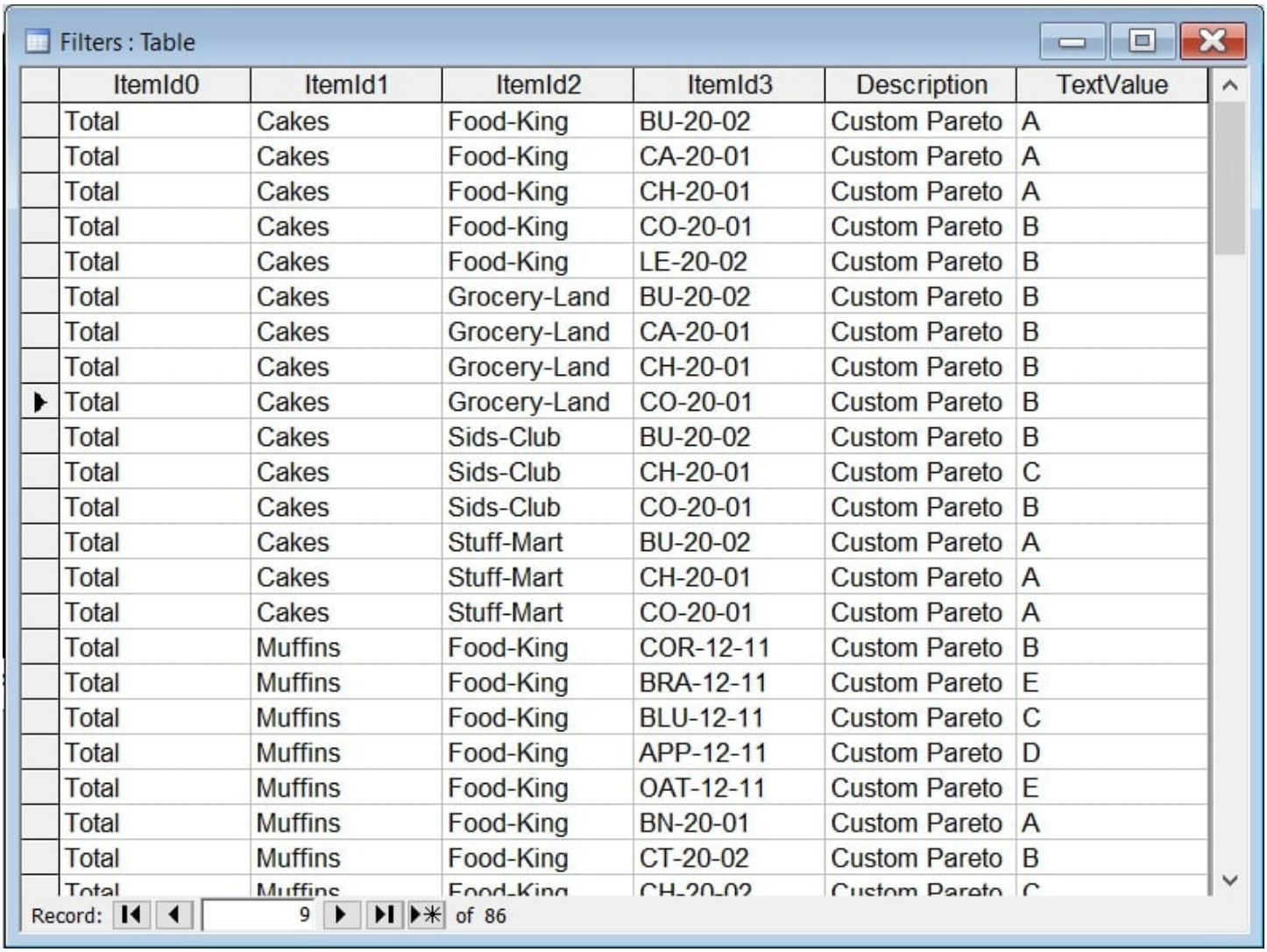
Examine the file *123 Bakery - Filters.xlsx*.



	A	B	C	D	E	F
1	Total	Category	Customer	SKU	Custom Pareto	Sales Rep
2	Total	Cakes	Food-King	BU-20-02	A	Nancy Kerrigan
3	Total	Cakes	Food-King	CA-20-01	A	Nancy Kerrigan
4	Total	Cakes	Food-King	CH-20-01	A	Nancy Kerrigan
5	Total	Cakes	Food-King	CO-20-01	B	Nancy Kerrigan
6	Total	Cakes	Food-King	LE-20-02	B	Nancy Kerrigan
7	Total	Muffins	Food-King	COR-12-11	B	Nancy Kerrigan
8	Total	Muffins	Food-King	BRA-12-11	E	Nancy Kerrigan
9	Total	Muffins	Food-King	BLU-12-11	C	Nancy Kerrigan

Notice that the attribute fields are present (columns A, B, C and D). In our example, columns E and F contain the filter fields.

If you will be using a table or query to hold the filter fields, you'll want to examine the *Filters* table in the file *123 Bakery - ODBC.mdb*.


Filters : Table

ItemId0	ItemId1	ItemId2	ItemId3	Description	TextValue
Total	Cakes	Food-King	BU-20-02	Custom Pareto	A
Total	Cakes	Food-King	CA-20-01	Custom Pareto	A
Total	Cakes	Food-King	CH-20-01	Custom Pareto	A
Total	Cakes	Food-King	CO-20-01	Custom Pareto	B
Total	Cakes	Food-King	LE-20-02	Custom Pareto	B
Total	Cakes	Grocery-Land	BU-20-02	Custom Pareto	B
Total	Cakes	Grocery-Land	CA-20-01	Custom Pareto	B
Total	Cakes	Grocery-Land	CH-20-01	Custom Pareto	B
Total	Cakes	Grocery-Land	CO-20-01	Custom Pareto	B
Total	Cakes	Sids-Club	BU-20-02	Custom Pareto	B
Total	Cakes	Sids-Club	CH-20-01	Custom Pareto	C
Total	Cakes	Sids-Club	CO-20-01	Custom Pareto	B
Total	Cakes	Stuff-Mart	BU-20-02	Custom Pareto	A
Total	Cakes	Stuff-Mart	CH-20-01	Custom Pareto	A
Total	Cakes	Stuff-Mart	CO-20-01	Custom Pareto	A
Total	Muffins	Food-King	COR-12-11	Custom Pareto	B
Total	Muffins	Food-King	BRA-12-11	Custom Pareto	E
Total	Muffins	Food-King	BLU-12-11	Custom Pareto	C
Total	Muffins	Food-King	APP-12-11	Custom Pareto	D
Total	Muffins	Food-King	OAT-12-11	Custom Pareto	E
Total	Muffins	Food-King	BN-20-01	Custom Pareto	A
Total	Muffins	Food-King	CT-20-02	Custom Pareto	B
Total	Muffins	Food-King	CH-20-02	Custom Pareto	C

Record: 9 of 86

Notice that the attribute fields are present. *Description* is a text field containing the filter name. *TextValue* is a text field containing the filter's value.

Formatting rules

In a spreadsheet, a header row that includes the names of the filter fields is required.

The filters can be assigned at any level.

If an item has no associated filters, it does not need to be included in the spreadsheet, table or query.