

Using Advanced Filters

Advanced filters pull in all fields from a record where you can filter on any of their respective field values. Advanced filters also include all date fields included in standard filters. You can apply different criteria to those fields that you are not able to apply in the standard filters. Some common usages of Advanced Filters can be found below.

**Filters below are made with AMPED standard fields.*

Specific Owner's List

If you are only looking to see a specific owner's records such as your own,

In this filter, we want to see all our records that are owned by a specific owner. In the first column, select "Owner". In the second column, select "Equals". In the third column, enter the user's **username**.

ADVANCED FILTERS
Set the search conditions to further restrict the list.

- You can use "or" filters by entering multiple items in the third column.
- You can enter as many item as you like, separated by commas. For example: CA, NY, TX, FL searches for CA or NY or TX or FL.

✖ Owner

✖ Equals

ampedsupport@vantage.com

And

****When selecting 'Owner' as a filtering criterion, the user must type the value as the Username and not the First or last Name to be filtered upon. The reason for this is that First Name Last Name is not always unique (ex. Each company may have several John Smith's), but the username is always unique.**

Location-Based List

In this filter, we want to see all our records that are in Pennsylvania (PA). In the first column, select "State". In the second column, select "Contains". In the third column, Enter "PA, Pennsylvania".

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✖ State

✖ Contains

PA, Pennsylvania

And

****Since Pennsylvania can be represented in AMPED by its full name or abbreviation, we want to include both values. To do so, we use "contains" in the second column. In the third column, we enter in each value that we are looking for separated by a comma. In this case, we enter "PA, Pennsylvania". As a result, records with both values in the **State** field will appear in the list view.**

Specific Product Interest

In this filter, we are a salesperson selling produce – apples, oranges, bananas. We want to create a filter list that contains leads interested in apples using a [custom field](#) – "Produce of Interest". There are two different ways to do this:

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✖ Produce of Interest

✖ Contains

apples

And

✖ Produce of Interest

✖ Does not contain

oranges, bananas

And

- In the first column, select "Produce of Interest". In the second column, enter "Contains" (equals would also work for this). In the third column, enter "Apples". This filter combination will give you every lead that is interested in apples.

- In the first column, select "Product/Service of Interest". In the second column, enter "Does not contain". In the third column, enter "oranges, bananas". This filter combination filters out any leads who are interested in oranges or bananas.

** In this filter combination, Apples will be the only product of interest left. But if we were to be selling more produce like strawberries or blueberries, using this filter would leave us with leads that are interested in apples, strawberries, or blueberries.

Specific Opportunity Values

In this filter, we want to create a list view of opportunities who have amount values of \$10,000 or more. To do so, in the first column, enter "Amount". In the second column, enter "Greater or equal". In the third column, enter "10000".

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× Amount

× Greater or equal

10000

And

**We use "Greater or equal" to include Amount values of \$10,000 in our results. If we use "greater", the resulting list will contain opportunities that have Amount values of \$10,001 or more.

**In the third column, do not enter any symbols like the dollar sign (\$) or punctuation like commas [,] or decimals [.] – only the number value.

Campaigns Use Case

If you are creating a filter to add to a campaign you may want to consider adding additional criteria to the filter to display an accurate number of recipients.

Email Campaigns

When sending out email campaigns, you want to filter out all those recipients that are marked as email opt out. Amped automatically handles opt outs via a link included with all mass emails. To filter out records that are opted out from communications, in the Advanced Filter criteria include a filter for 'Email Opt Out > does not equal > Yes'.

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× Email Opt Out

× Not equal to

yes

And

**Email Opt outs are handled automatically by the application if the recipient selects the link included in all mass email communications for opt out. A recipient is not automatically opted out if they respond back to the communication. If you forget to include this filter, the application will automatically remove opted out recipients from the communication. Inclusion of the filter is necessary only for the user to be able to accurately see how many emails will be sent out prior to the communication.

SMS Campaigns

When sending out email campaigns, you want to filter out all those potential recipients that do not contain a mobile number, mobile number that has been verified, or is SMS opt out. Additional filters to apply are 'Mobile is not equal to (blank)' (where the criteria is left blank); 'Mobile Verification is equal to 'Yes'; and/or 'SMS opt out is not equal to Yes'.

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✖ Sms Opt Out ▼

✖ Not equal to ▼

yes

And

✖ Mobile Verified ▼

✖ Equals ▼

yes|

And

**SMS opt outs are handled automatically by the application if the recipient texts: Stop, Quit, Unsubscribe or Cancel in compliance with federal regulations on SMS communications. If you forget to include these filters, the application will automatically remove opted out recipients from the communication. Inclusion of the filter is necessary only for the user to be able to accurately see how many SMS messages will be sent out prior to the communication.