

Using Related Filters

Related Filters allow the user to further restrict their list view by pulling in information from other modules. This allows you to filter on fields and field values on records in modules where the records have a relationship. For example, from the Accounts module, you can leverage information related to Contacts, Opportunities and Activities. Some common usages of Related Filters can be found below.

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

Accounts with Open Opportunities

In this filter, we want to see all of our accounts that have at least one open opportunity. Create the filter from the accounts module and use the opportunities module as the related information. In the Related Filters section, select "Opportunities" - "Forecast" - "Does not contain" - "closed" & "Opportunities" - "Sales Stage" - "Does not contain" - "closed". This will eliminate any account that has only closed opportunities associated with it. You can use the [Sort Order](#), [Standard Filters](#) or [Advanced Filters](#) to narrow this list down even further.

RELATED FILTERS

Select the related module and set the search conditions to further restrict the list.

- You can use "or" filters by entering multiple items in the fourth 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.

| | | | | |
|-----------------|---------------|--------------------|--------|-----|
| × Opportunities | × Forecast | × Does not contain | closed | And |
| × Opportunities | × Sales Stage | × Does not contain | closed | And |

Leads within a Campaign

In this filter, we want to see any lead that was part of a unique campaign. Create the filter from the leads module and use the campaigns module as the related information. In the Related Filters section, select "Campaigns" - "Campaign Name" - "Equals" - "Campaign Name". **Enter the name of the unique campaign you are looking for in the textbox.* This will yield all leads that are associated in the specified campaign. You can use the [Sort Order](#), [Standard Filters](#) or [Advanced Filters](#) to narrow this list down even further.

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| | | | | |
|---------------|-----------------|-------------------------|---------------|-----|
| × Campaigns | × Campaign Name | × Equals | Campaign Name | And |
| Select module | Select a column | Select search condition | | And |