

Filtering for a Custom Segment

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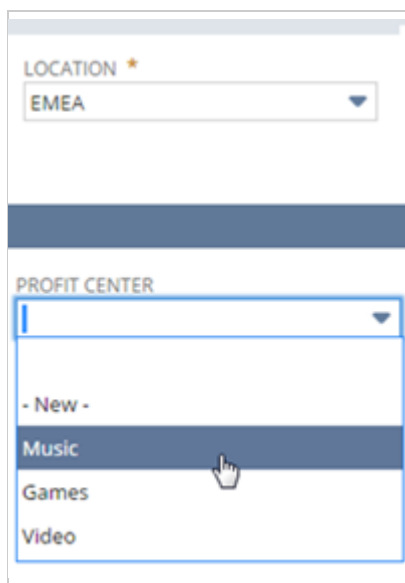
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If appropriate, you can set up a segment so that, when it appears on a record, its values are filtered. Values can be filtered based on choices the user made in other classification fields on the same record.

For example, consider a company that markets entertainment media. This company has a segment called Profit Center, with values such as Books, Games, Music, and Video. The company operates in APAC, EMEA, and North America, and has Location values that represent each of those geographic areas.

Suppose that both Profit Center and Location are available on sales transactions, but for some locations only certain Profit Centers are available. For example, all profit centers may be available in North America. However, in the other three locations, only games, music, and video are available.

In this case, you can configure the Profit Center segment so that its values are filtered based on the value selected for Location. With this configuration, you can specify that, if the selected Location is EMEA, the Books value is hidden from the list of Profit Center values.



LOCATION ★
EMEA ▼

PROFIT CENTER

- New -
- Music
- Games
- Video

In addition to Location, you can filter based on the values selected in the Class and Department fields, if those features are enabled. Additionally, you can filter based on choices the user made in another segment. In OneWorld accounts, you can also filter by the Subsidiary field.

Note also that you can filter by one field or by multiple fields.

For more details about filtering, see the following topics:

- [Setting Up Filtering for a Custom Segment](#)
- [Removing Filtering from a Custom Segment](#)
- [Viewing a Custom Segment's Filtering Relationships](#)

Related Topics