

## Filtering Across Body and Line Segments

Segment values on transaction lines can be filtered by the segment value set in the body of a transaction. When you select a value for a parent segment, child segments of only that parent are available for selection on transaction lines.

**Note:** You can have issues with filtering if you have the following scenario:

- A parent field exists on the expense line.
- You hide the parent field on the expense line using form customization.

Custom segment filtering on an expense line uses the parent field to filter. When you hide the parent field, the field still exists as a hidden field. Filtering from a parent body field will not work because the custom segment on the line continues to filter by the hidden parent line field. The custom segment does not filter by the parent body field.

For example, you have a parent custom segment called Business Unit that is available on purchases at the body level and includes a list of various areas of the business, such as grocery, bakery, and cafe.

### Custom Segment

List Search More

Save Cancel Reset Manage Values Actions

#### Primary Information

LABEL \*  
Business Unit

ID  
cseg\_business\_unit

RECORD ID  
customrecord\_cseg\_business\_unit

TYPE  
List/Record

☐ INACTIVE

FILTERED BY

Class  
Department  
Location  
Subsidiary

#### Accounting

☐ GL IMPACT

#### Details

HELP

DESCRIPTION

Values Application & Sourcing Validation & Defaulting Permissions Dependent Segments Display Order

DISPLAY ORDER ☒ SUBLIST ☐ ALPHABETICAL

VALUE *	PARENT	INACTIVE	FILTERING
:: Grocery			
:: Cafe			
:: Bakery			

Add Cancel Insert Remove Move Up Move Down Move To Top Move To Bottom Set Filters

The child custom segment, Product Line, is filtered by Business Unit and available on purchase transaction lines. Items include food, cold beverages, hot beverages, and frozen desserts. For each list value, you set filtering to specify for which business unit the item will be available.

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### Custom Segment

Save Cancel Reset Manage Values Actions

Primary Information

LABEL \*  
Product Line

ID  
cseg\_product\_line

RECORD ID  
customrecord\_cseg\_product\_line

TYPE  
List/Record

☐ INACTIVE

FILTERED BY

Business Unit  
Class  
Department  
Location

Accounting

☐ GL IMPACT

Details

HELP

DESCRIPTION

Values

Application & Sourcing

Validation & Defaulting

Permissions

Dependent Segments

Display Order

DISPLAY ORDER

SUBLIST

ALPHABETICAL

VALUE *	PARENT	INACTIVE	FILTERING
Food			Business Unit: Grocery, Bakery
Hot Beverages			Business Unit: Grocery, Cafe
Cold Beverages			Business Unit: Grocery, Cafe
Desserts			Business Unit: Cafe, Bakery

On a purchase order, selecting a business unit at the body level filters the items available in the Product Line list at the line level, making order entry less cumbersome.

SUBSIDIARY

CLASS

LOCATION \*

DEPARTMENT

Items

Shipping

Billing

Accounting

Relationships

Sales Team

BUSINESS UNIT

Cafe

- New -

Hot Beverages

Cold Beverages

Desserts

+

Save

Cancel

Auto Fill

Reset

Actions

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