

Advanced Filtering Using SQL Syntax:

Background:

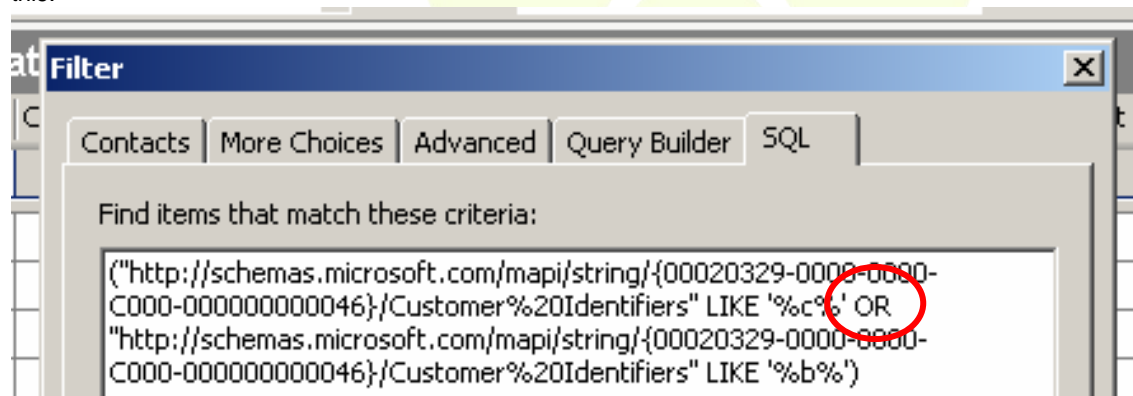
The ability to use the SQL Tab in Outlook, greatly enhances the ability of **youGROW** to filter on different requirements, when you have more than one criteria. This can seem a little confusing, as we are using a basic programming language, but it's actually quite simple when you follow the instructions below.

You can use the **Advanced** Tab or the **More Choices** Tab when filtering to find contacts with a particular category, without using the **SQL** Tab – however, the **SQL** Tab adds tremendously to the power of filtering – once you have tried it, you'll find it invaluable.

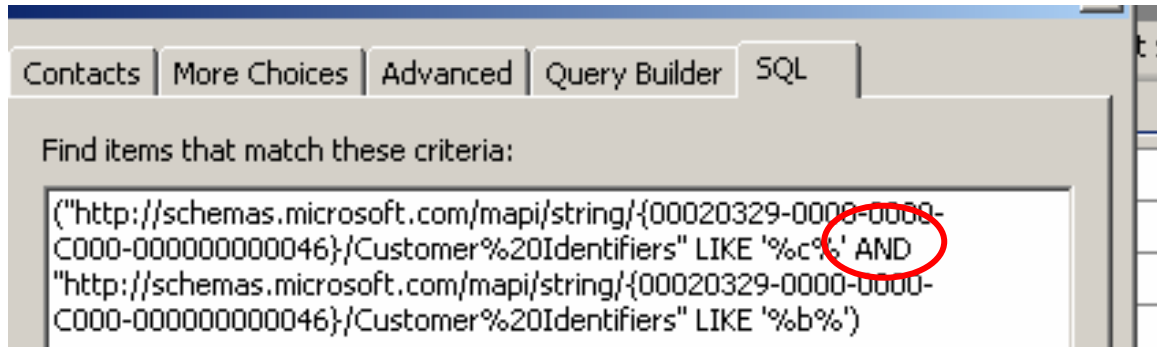
NB: Although we are using the Customer Identifier field here as an example, these instructions apply to any field you want to field on – from either the youGROW fields, or the standard Outlook fields.

By default, when you add more than one criteria, the Outlook/**youGROW** filters use the **OR** operator to string different criteria together. For example, you can create filters to view contacts who have the **Customer Identifier B OR C**, but not filters for contacts with the **Customer Identifier B AND C**. The filter dialog doesn't support the **AND** operator directly, although you can use the Advanced filter to create an **OR**.

When you create the filter **Customer Identifier A OR B**, the SQL code under the **SQL** Tab, looks like this:



Now click on the **SQL** tab, check the box at the bottom of the tab to **edit these criteria directly**, and change the **OR** to **AND**, so the rule shows all contacts with both a **B AND C**.



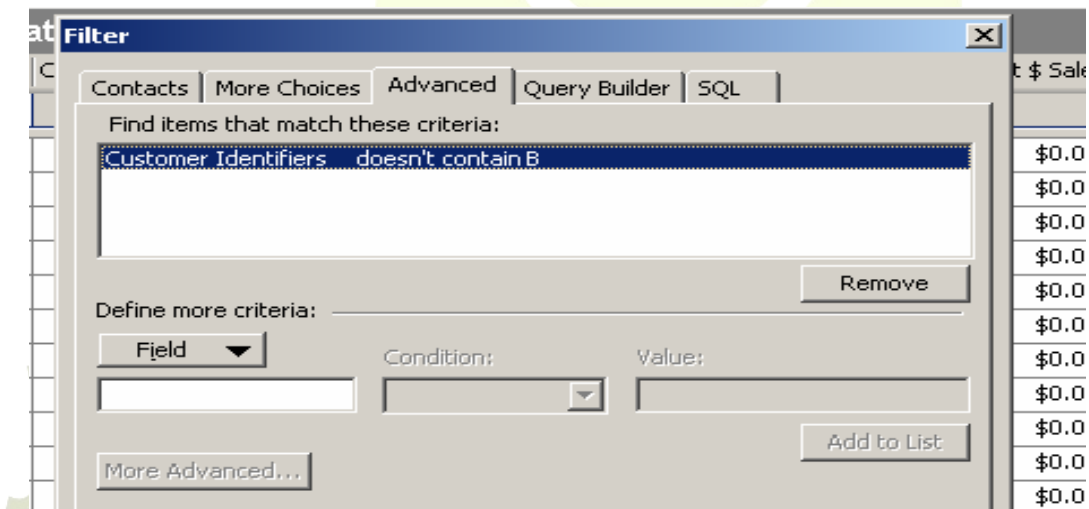
Examples:

1. We want to find all contacts with a 'B' in the Customer Identifier field.

1. With your **youGROW** contacts folder open, click on **Filter**.
2. Click on **Advanced**.
3. In the dropdown arrow under **Field**, select **youGROW (MYOB)**.
4. Select **Customer Identifier**.
5. Under the **Condition** – select **contains**.
6. Under **Value**, type **B**.
7. Click **OK** (Note that as this one criteria only, we do not need to use the SQL syntax tab).

2. We want to find all contacts who don't have a 'B', in the Customer Identifier field.

1. With the **youGROW** contacts folder open, click on **Filter** on the top command line.
2. Click on the **Advanced** tab.
3. In **Field** click the drop down arrow and select **youGROW (MYOB)**.
4. Select **Customer Identifiers**.
5. In the **condition** field, select **contains** from the drop down list.
6. Under **value**, type **B**.
7. Click **Add to List**.

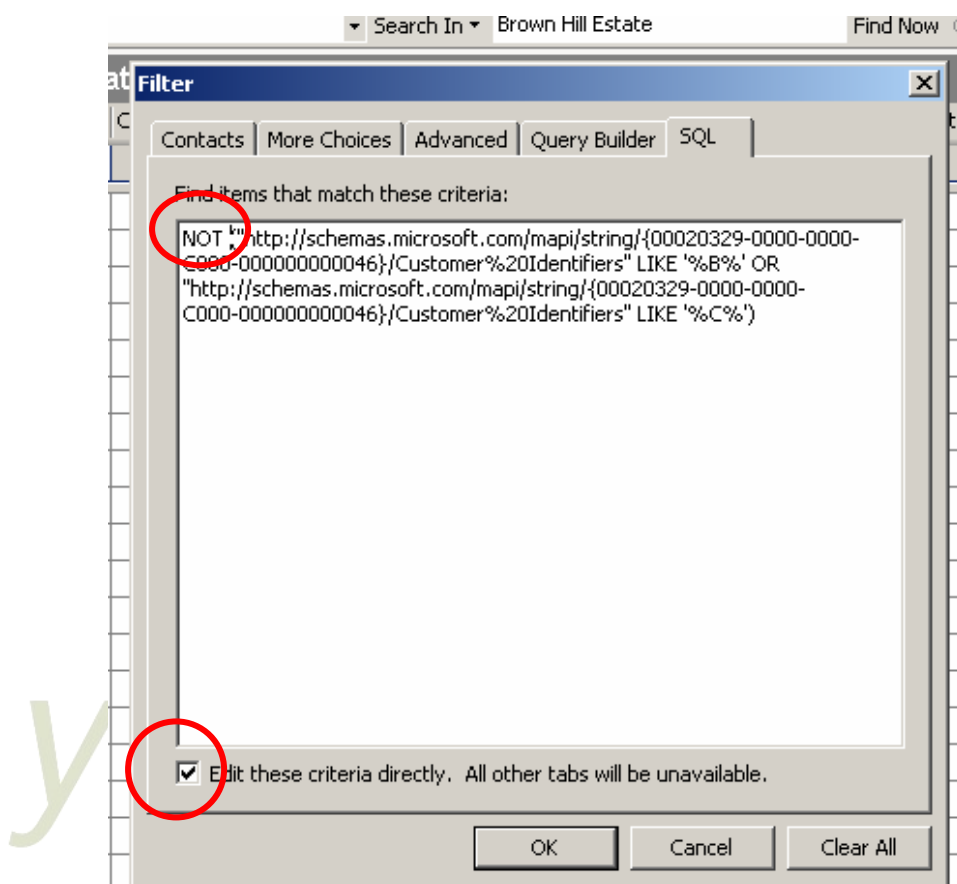


3. We want to find all contacts who have either a 'B', or a 'C' in the Customer Identifier field.

1. With the **youGROW** contacts folder open, click on **Filter** on the top command line.
2. Click on the **Advanced** tab.
3. In **Field** click the drop down arrow and select **youGROW (MYOB)**.
4. Select **Customer Identifiers**.
5. In the **condition** field, select **contains** from the drop down list.
6. Under **value**, type **B**.
7. Click **Add to List**.
8. Repeat the above, except that the value contains **C**, and **Add to List**.
9. Click **OK** – no need for the SQL Tab, as the default is **OR**.

4. We want to find all contacts who have neither a 'B' in the Customer Identifier field, nor a 'C'.

1. With the **youGROW** contacts folder open, click on **Filter** on the top command line.
2. Click on the **Advanced** tab.
3. In **Field** click the drop down arrow and select **youGROW (MYOB)**.
4. Select **Customer Identifiers**.
5. In the **condition** field, select **contains** from the drop down list.
6. Under **value**, type **B**.
7. Click **Add to List**.
8. Repeat the above, except that the value contains **C**, and **Add to List**.
9. Click on the **SQL** Tab.
10. Click the check box **Edit these criteria directly**.

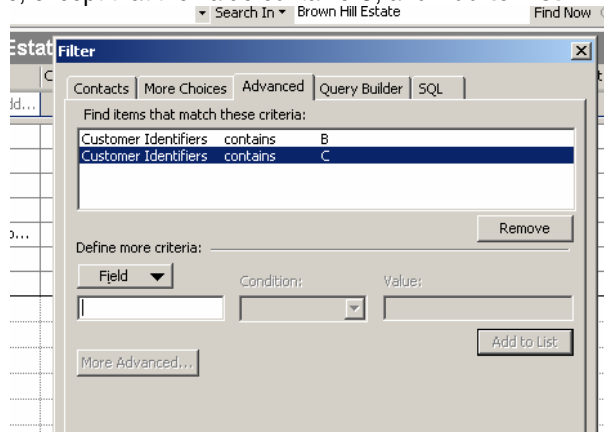


11. Place your cursor at the beginning of the **SQL** statement – as circled above, and type **NOT**, followed by a space.
12. Click **OK**.
13. You have now filtered to find everyone who has neither a **C**, nor a **B** in their Customer Identifier field.

5. We want to find all contacts who have a 'B' in the Customer Identifier field, but not a 'C'.

1. With the **youGROW** contacts folder open, click on **Filter** on the top command line.
2. Click on the **Advanced** tab.
3. In **Field** click the drop down arrow and select **youGROW (MYOB)**.

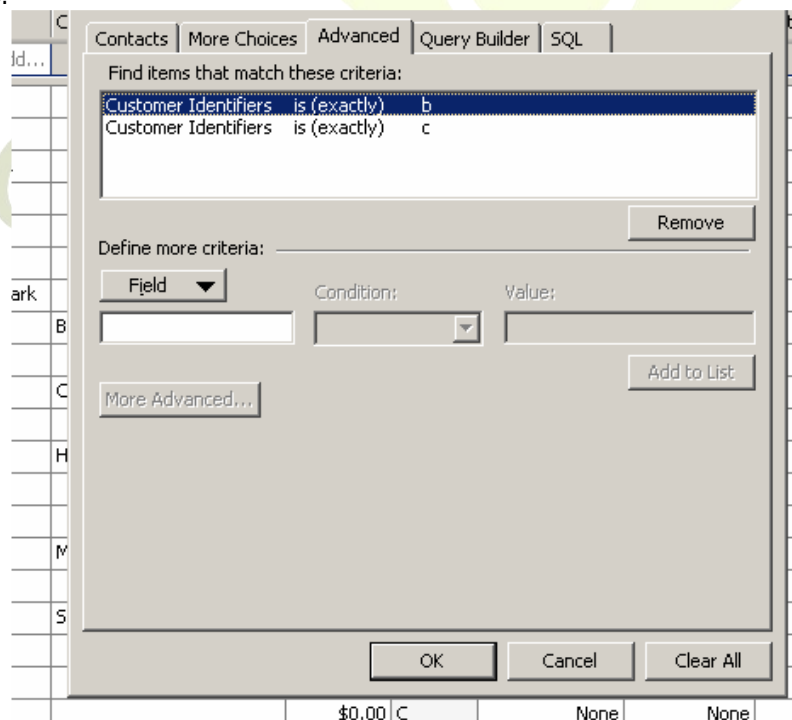
4. Select **Customer Identifiers**.
5. In the **condition** field, select **contains** from the drop down list
6. Under **value**, type **B**.
7. Click **Add to List**.
8. Repeat the above, except that the value contains **C**, and **Add to List**.



9. Now click on the **SQL** Tab.
10. Check the box in the bottom left hand corner to **edit these criteria directly**.
11. Find the **OR** in the **SQL** statement – as circled above, and change this to **AND NOT**.
12. Click **OK**.
13. You have now filtered to find everyone who has neither a **C**, nor a **B** in their **Customer Identifier** field.

6. Where Customer Identifier is either just 'B' or just 'C'

We don't need to use the **SQL** Tab here, as the default **syntax** is **OR**. Below is what the **Advanced** Tab looks like.



Other examples of Using the SQL Syntax:

Find all people who have bought a particular product (using Description):

“Description” LIKE ‘%PRODUCT NAME%’

Find all people who have bought PRODUCT #1 and/or PRODUCT #2 (using Description):

(“Description” LIKE ‘%PRODUCT #1%’) OR (“Description” LIKE ‘%PRODUCT #2%’)

Find all people who have bought both PRODUCT #1 and PRODUCT #2 (using Description):

(“Description” LIKE ‘%PRODUCT #1%’) AND (“Description” LIKE ‘%PRODUCT #2%’)

Find all people who have bought PRODUCT #1, but not PRODUCT #2 (using Description):

(“Description” LIKE ‘%PRODUCT #1%’) AND NOT (“Description” LIKE ‘%PRODUCT #2%’)

Find all people who have bought PRODUCT #1, or PRODUCT #2, but not both:

(“Description” LIKE ‘%PRODUCT #1%’ OR “Description” LIKE ‘%PRODUCT #2%’) AND NOT
 (“Description” LIKE ‘%PRODUCT #1%’ AND “Description” LIKE ‘%PRODUCT #2%’)

Find all people who have bought genuine cartridges only (using Category 1):

(“Category 1” LIKE ‘%GENUINE%’) AND NOT (“Category 1” LIKE ‘%REFILL%’)



youGROW