



Advanced Queries

Advanced Queries is a powerful feature in Manager.io that allows you to select, sort, filter, and organize your data on any tabular screen, offering nearly unlimited reporting possibilities. This feature is particularly useful when combined with Custom Fields, enabling customized data management tailored to your business needs.

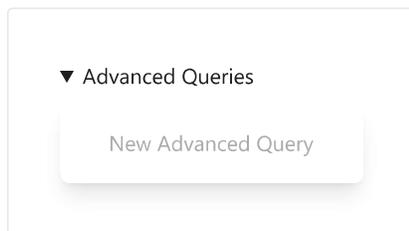
Accessing Advanced Queries

To access Advanced Queries:

1. Navigate to the tab with the data you need—for example, the **Sales Invoices** tab.



2. Click on **Advanced Queries**, located in the top-right corner next to the search box.
3. Click on **New Advanced Query** to start creating an advanced query.

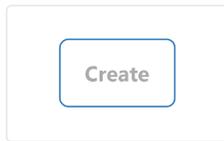


Creating an Advanced Query

When creating an Advanced Query, you will see the following fields:

- **Name:** Allows you to specify a name for the advanced query for future identification.
- **Select:** Allows you to choose which columns you'd like to see. Use arrows to reorder columns as required.
- **Where...:** Enables you to set up filters to narrow down your list of records based on specific parameters.
- **Order by...:** Allows you to specify how the results should be sorted.

- **Group by...:** Lets you group records by specific column or columns.



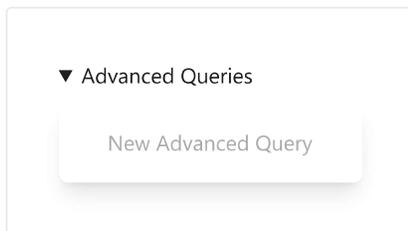
Example: Viewing Sales Invoices Above \$1,000

Imagine you want to see all sales invoices with an amount greater than \$1,000. Here's how you can set this up:

1. **Go to the Sales Invoices tab.**



2. **Click on the Advanced Queries dropdown, then click on New Advanced Query.**



3. **In the Select field, choose the columns you would like to display for each invoice.**

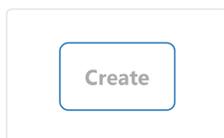
For example:

- **Issue date**
- **Customer**
- **Invoice Amount**
- **Status**

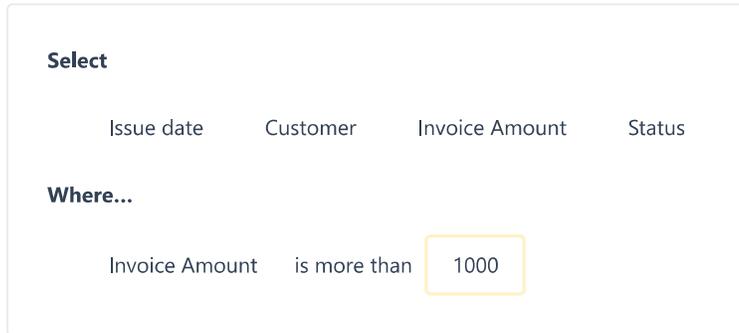
4. **Check the Where... checkbox and set up your filter:**

- Select **Invoice Amount** field.
- Choose **is more than**.
- Enter the amount **1000**.

5. **Click the Create button** to create your Advanced Query.



This will take you back to the **Sales Invoices** tab with your advanced query created and selected. You should now see only sales invoices where the Invoice Amount is above \$1,000.



Select

Issue date Customer Invoice Amount Status

Where...

Invoice Amount is more than 1000

You can click the **Edit** button to further refine your Advanced Query.

Applying Advanced Queries to Other Tabs

You can follow this same procedure to create Advanced Queries under any tab, giving you ultimate flexibility in querying your data.

Combining Advanced Queries with Custom Fields

Combine Advanced Queries with Custom Fields to track and report on specialized data unique to your business, such as customer satisfaction scores or specific service types.

See [Custom Fields](#) for more information.

By utilizing Advanced Queries, you can tailor your data views to meet specific business needs, making data management more efficient and effective.