

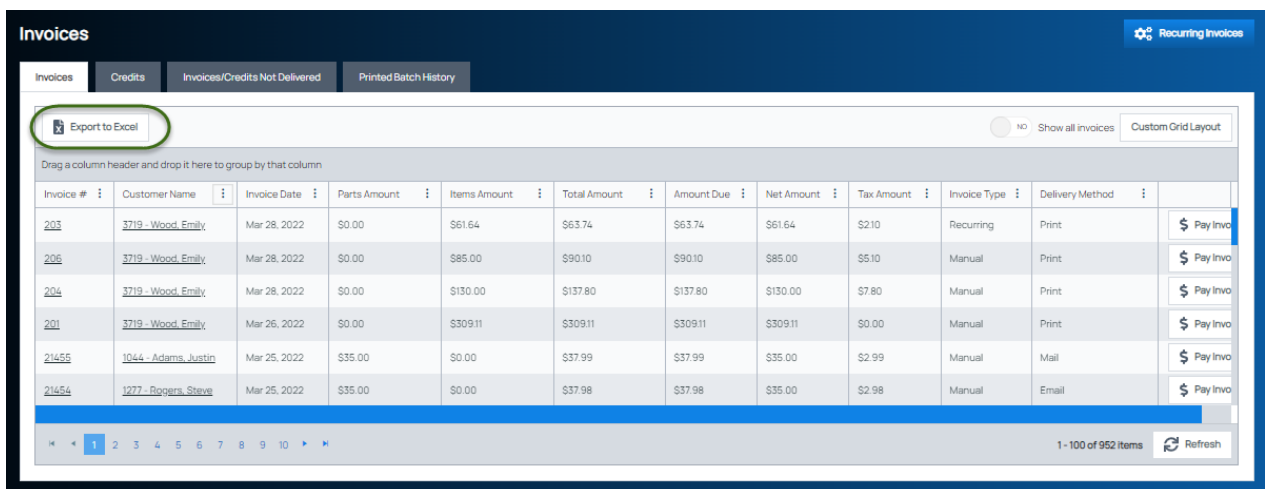
Grid Options

Last Modified on 04/17/2022 10:15 pm EDT

Throughout the Managely application, wherever a page is displayed with a grid of data, most of the time, there are tools available for managing the records displayed. Not every page with a grid has all of the tools available. Each of these tools is explained below.

Export to Excel

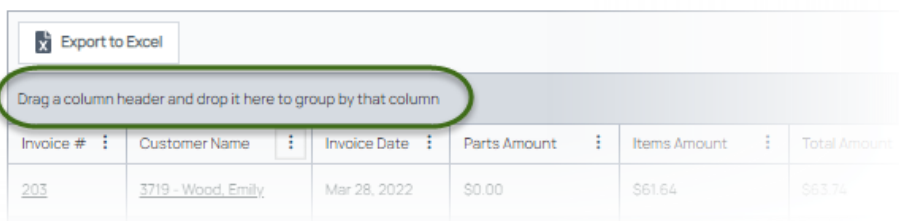
If you are viewing a page of all active or inactive records, clicking on the Export to Excel button will create an Excel file with a listing of the records currently shown in the grid. In a few seconds, the export file will appear on the task bar. Double-click on the file to open.



The screenshot shows the 'Invoices' page with a grid of invoice data. The 'Export to Excel' button is circled in green. The grid has columns for Invoice #, Customer Name, Invoice Date, Parts Amount, Items Amount, Total Amount, Amount Due, Net Amount, Tax Amount, Invoice Type, Delivery Method, and a 'Pay Invo' button. A banner row above the grid says 'Drag a column header and drop it here to group by that column'. The grid shows 10 rows of data, with the first row being invoice 203 for customer 3719 - Wood, Emily.

Column Grouping

For grid pages where there is a banner row titled "Drag a column header and drop it here to group by that column", users are able to group the data displayed in the grid by one or multiple columns.



This close-up shows the 'Export to Excel' button and the grouping banner: 'Drag a column header and drop it here to group by that column'. Below the banner, the first three columns of the grid are visible: Invoice #, Customer Name, and Invoice Date. The first row of data shows invoice 203 for customer 3719 - Wood, Emily, dated Mar 28, 2022.

To group the data, hold the left-mouse button down on the column you want to group by, and then drag up into the grouping bar and release the mouse.

To un-group the records, click the "X" button on the field that was dragged into the grouping area.

Invoices Recurring Invoices

Invoices Credits Invoices/Credits Not Delivered Printed Batch History

Export to Excel Show all invoices Custom Grid Layout

Drag a column header and drop it here to group by that column + Customer Name

Invoice #	Customer Name	Invoice Date	Parts Amount	Items Amount	Total Amount	Amount Due	Net Amount	Tax Amount	Invoice Type	Delivery Method	
203	3719 - Wood, Emily	Mar 28, 2022	\$0.00	\$61.64	\$63.74	\$63.74	\$61.64	\$2.10	Recurring	Print	\$ Pay Invo
206	3719 - Wood, Emily	Mar 28, 2022	\$0.00	\$85.00	\$90.10	\$90.10	\$85.00	\$5.10	Manual	Print	\$ Pay Invo
204	3719 - Wood, Emily	Mar 28, 2022	\$0.00	\$130.00	\$137.80	\$137.80	\$130.00	\$7.80	Manual	Print	\$ Pay Invo
201	3719 - Wood, Emily	Mar 26, 2022	\$0.00	\$309.11	\$309.11	\$309.11	\$309.11	\$0.00	Manual	Print	\$ Pay Invo
21455	1044 - Adams, Justin	Mar 25, 2022	\$35.00	\$0.00	\$37.99	\$37.99	\$35.00	\$2.99	Manual	Mail	\$ Pay Invo
21454	1277 - Roygers, Steve	Mar 25, 2022	\$35.00	\$0.00	\$37.98	\$37.98	\$35.00	\$2.98	Manual	Email	\$ Pay Invo

1 - 100 of 952 items Refresh

Invoices Grouped by Customer.

Invoices Recurring Invoices

Invoices Credits Invoices/Credits Not Delivered Printed Batch History

Export to Excel Show all invoices Custom Grid Layout

↑ Customer Name ×

Invoice #	Customer Name	Invoice Date	Parts Amount	Items Amount	Total Amount	Amount Due	Net Amount	Tax Amount	Invoice Type	Delivery Method	
▼ Customer Name: 3497 - Barry's Bicycles											
21329	3497 - Barry's Bicycles	Nov 1, 2021	\$0.00	\$110.00	\$112.57	\$112.57	\$110.00	\$2.57	Recurring	Email	
21412	3497 - Barry's Bicycles	Dec 1, 2021	\$0.00	\$110.00	\$112.57	\$112.57	\$110.00	\$2.57	Recurring	Email	
21343	3497 - Barry's Bicycles	Oct 1, 2021	\$0.00	\$110.00	\$112.57	\$112.57	\$110.00	\$2.57	Recurring	Email	
21276	3497 - Barry's Bicycles	Aug 1, 2021	\$0.00	\$110.00	\$112.57	\$112.57	\$110.00	\$2.57	Recurring	Email	
21312	3497 - Barry's Bicycles	Sep 1, 2021	\$0.00	\$110.00	\$112.57	\$112.57	\$110.00	\$2.57	Recurring	Email	
21244	3497 - Barry's Bicycles	Jul 1, 2021	\$0.00	\$201.67	\$206.38	\$206.38	\$201.67	\$4.71	Recurring	Email	
▼ Customer Name: 3498 - Crafted Crates											
21245	3498 - Crafted Crates	Jul 1, 2021	\$0.00	\$55.00	\$59.71	\$59.71	\$55.00	\$4.71	Recurring	Email	
21313	3498 - Crafted Crates	Sep 1, 2021	\$0.00	\$30.00	\$32.57	\$32.57	\$30.00	\$2.57	Recurring	Email	

901 - 952 of 952 items Refresh

Filter by Show All

If a toggle button is shown above the column header row "Show All", clicking the toggle button will display more records.

Invoices Recurring Invoices

Invoices Credits Invoices/Credits Not Delivered Printed Batch History

Export to Excel Show all invoices Custom Grid Layout

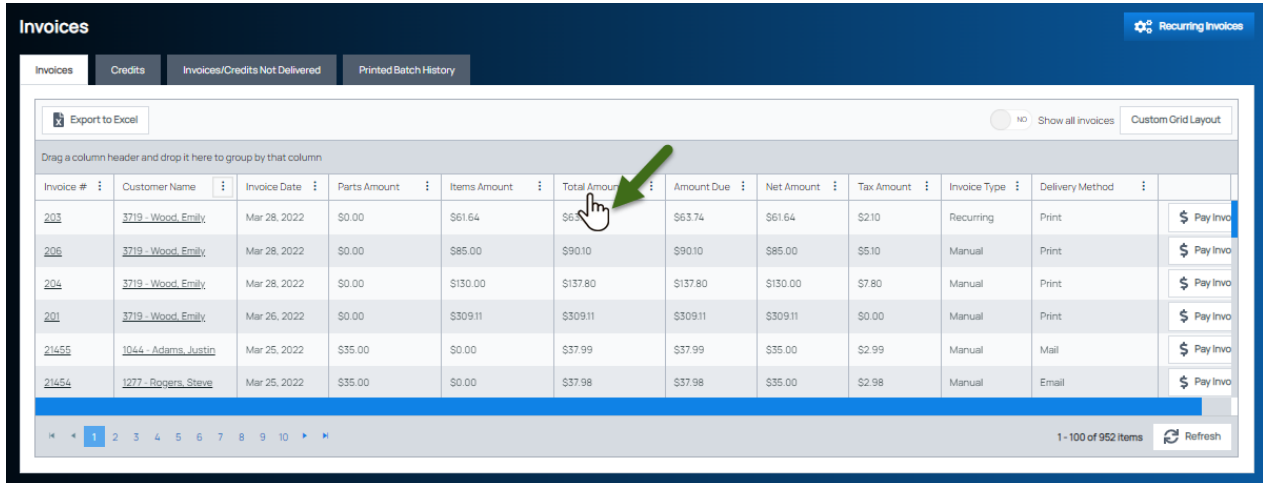
Drag a column header and drop it here to group by that column

Invoice #	Customer Name	Invoice Date	Parts Amount	Items Amount	Total Amount	Amount Due	Net Amount	Tax Amount	Invoice Type	Delivery Method	
203	3719 - Wood, Emily	Mar 28, 2022	\$0.00	\$61.64	\$63.74	\$63.74	\$61.64	\$2.10	Recurring	Print	\$ Pay Invo
206	3719 - Wood, Emily	Mar 28, 2022	\$0.00	\$85.00	\$90.10	\$90.10	\$85.00	\$5.10	Manual	Print	\$ Pay Invo
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201	3719 - Wood, Emily	Mar 26, 2022	\$0.00	\$309.11	\$309.11	\$309.11	\$309.11	\$0.00	Manual	Print	\$ Pay Invo
21455	1044 - Adams, Justin	Mar 25, 2022	\$35.00	\$0.00	\$37.99	\$37.99	\$35.00	\$2.99	Manual	Mail	\$ Pay Invo
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1 - 100 of 952 items Refresh

Sort by Column

When hovering over any column header, if a pointing finger icon is displayed, you are able to perform column sorting. Clicking on any column header within the grid will re-sort the information. When first accessing the page, the information displayed in the grid will show each record in the order in which they were created. Clicking on a column header will sort the grid in ascending order. Clicking the second time will sort in descending order, and clicking the third time will return to the original view.



The screenshot shows the 'Invoices' grid with the following data:

Invoice #	Customer Name	Invoice Date	Parts Amount	Items Amount	Total Amount	Amount Due	Net Amount	Tax Amount	Invoice Type	Delivery Method	
203	3719 - Wood, Emily	Mar 28, 2022	\$0.00	\$61.64	\$61.64	\$63.74	\$61.64	\$2.10	Recurring	Print	\$ Pay Invo
206	3719 - Wood, Emily	Mar 28, 2022	\$0.00	\$85.00	\$90.10	\$90.10	\$85.00	\$5.10	Manual	Print	\$ Pay Invo
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21454	1277 - Rogers, Steve	Mar 25, 2022	\$35.00	\$0.00	\$37.98	\$37.98	\$35.00	\$2.98	Manual	Email	\$ Pay Invo

Column Options

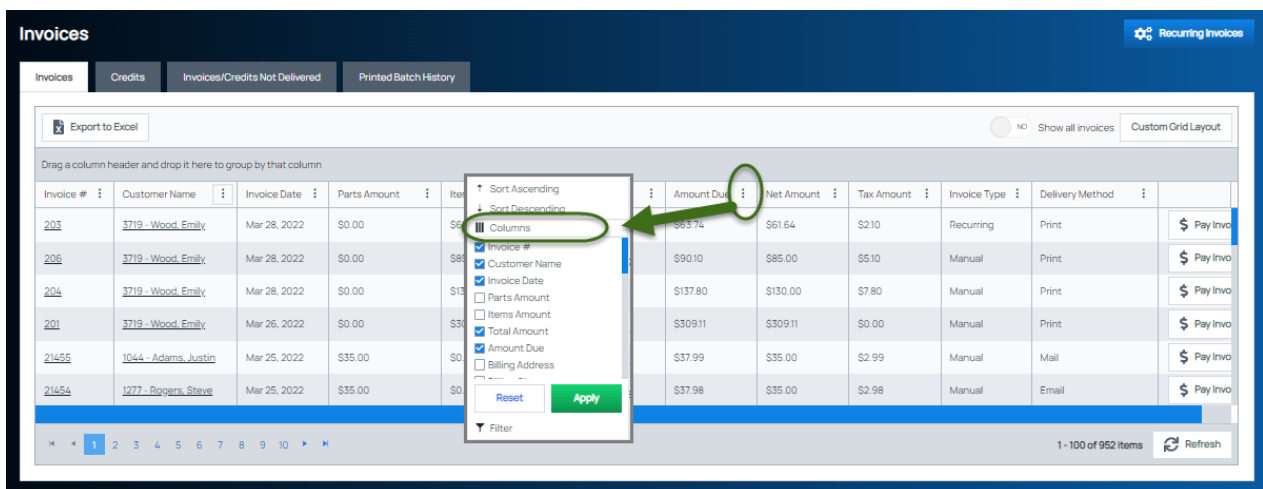
Clicking on the ellipse button to the right of any column header will display a list of two or four options.

- Two options - Sort Ascending, Sort Descending.
- Four options - Sort Ascending, Sort Descending, Columns, and Filter.

Columns

When selecting this option, a list of all available columns is displayed. If you do not want certain columns displayed in the grid, un-check the box to the left of each field. Click the Apply button when finished.

Note: If you leave the page then return again, the columns will revert to the default view.



The screenshot shows the 'Invoices' grid with the 'Columns' menu open over the 'Total Amount' column header. The menu options are:

- Sort Ascending
- Sort Descending
- Columns
- Invoice #
- Customer Name
- Invoice Date
- Parts Amount
- Items Amount
- Total Amount
- Amount Due
- Billing Address

Buttons: Reset, Apply

Filter

This option is used to refine the records displayed in the grid. When clicking on Filter, a dialog box will be displayed for entering criteria to find the records you want to display. The first field contains a drop-down list from which to select an operator. The list of available operators are:

- Is equal to
- Is not equal to
- Contains
- Does not contain
- Starts with
- Ends with
- Is null
- Is not null
- Is empty
- Is not empty
- Is after or equal to (only available when filtering on a date type field)
- Is after (only available when filtering on a date type field)
- Is before or equal to (only available when filtering on a date type field)
- Is before (only available when filtering on a date type field)

Select the desired operator, and then enter criteria into the field below. Click on Filter when finished. The list will refresh based upon the filter criteria entered.

Note: If you leave the page then return again, any filters created will be removed.

The screenshot shows a software interface for managing invoices. At the top, there are tabs for 'Invoices', 'Credits', 'Invoices/Credits Not Delivered', and 'Printed Batch History'. Below the tabs is an 'Export to Excel' button and a 'Show all invoices' toggle. The main area is a grid of invoice records. A filter dialog box is open over the 'Amount Due' column. The dialog box has a title bar with 'Filter' and a close button. It contains a dropdown menu with 'Is after or equal to' selected, a text input field with 'month/day/year' and a calendar icon, and a 'Filter' button. The grid data is as follows:

Invoice #	Customer Name	Invoice Date	Parts Amount	Items	Amount Due	Net Amount	Tax Amount	Invoice Type	Delivery Method	
203	3719 - Wood, Emily	Mar 28, 2022	\$0.00	\$61.64	\$85.74	\$61.64	\$2.10	Recurring	Print	\$ Pay Invo
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