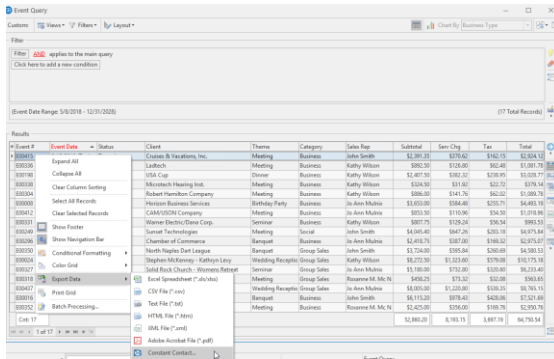



Exporting Grid Data

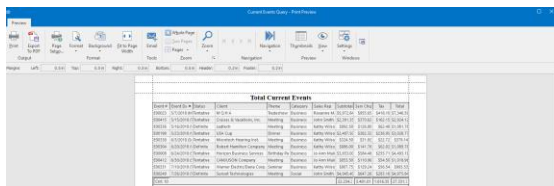
1. Generate a query.
2. Click your right mouse button anywhere on the grid.
3. Select **Export Data**.
4. Choose a format for your export.
5. Enter a name for the exported file.
6. Click **Save**.



See [Working with Grids](#)

Printing Grids.

1. Generate a query.
2. Click the **Print Grid** button , located on the right-hand side of the grid. From the Print Preview screen which displays, click the **Page Setup** button to adjust paper size/orientation, margins, header/footer, or to scale the size of the printed text.
3. Optionally click the **Format** button to rename the title, adjust the page numbers and date and time, etc.
4. Click the **Print** button at the top left-hand side of the Print Preview screen to send the grid print to your printer.



See [Working with Grids](#)

Sending Batch E-mails from a Query (Professional Version)

1. Generate a query, such as an Events Query or a Current Events Query.
2. From the results grid, select multiple records by holding down your **[Shift]** or **[Ctrl]** key while selecting.
3. Click the **Email** button, located at the top left-hand side of the results screen.
4. Type a subject into the **Subject** field or select an option from the drop-down quickpick list.
5. Type a message as the body of your e-mail into the text block.
6. Optionally attach any files or prints.
7. Click **Send**.

See [Generating Batch Emails](#)

Additional Resources

- [Color Coding Detail Grids](#)
- [Scaling Text Size on Grid Prints](#)
- [Changing the Conjunction in a Query](#)
- [Printing Bar Codes](#)



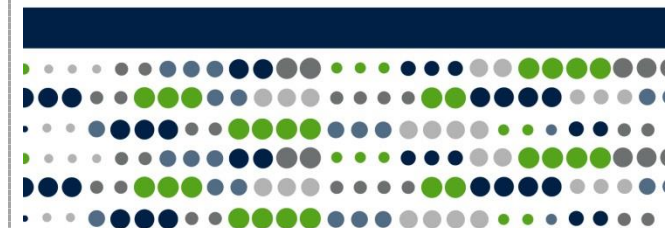
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Naples, FL 34102
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F: 239.261.0067
www.caterease.com
help@caterease.com



Quick Reference Guide:

Query Tools

800.863.1616
www.caterease.com



Running an Event Query

1. Click the **Event Query** button from the **Queries** sidebar.
2. Every query has a Base Query window, which allows you to restrict your data prior to establishing any filtering.
3. Establish a **Date Range** or **Relative Date Range**.
4. Optionally exclude any desired statuses from your query by clicking the down arrow to the right of the **Exclude Status** field and clicking into the corresponding checkboxes.

Event Base Query

Set Parameters

Date Range

Less Than Or Equal To 5/1/2018 thru 5/31/2018

Greater Than Or Equal To

Within Date Range

Relative Date Range This month

Query Options

Exclude Status

Closed;Cancelled

Prospective

Tentative

Definite

Closed

Cancelled

See [Querying Events](#)

Tracking Your Current Events

1. Click the **Current Events** button from the **Tools** sidebar.
2. Click the down arrow to the right of the **Days Out** field and choose how many days out you would like your search to go.
3. Optionally exclude any event statuses you would like to exclude from your query by clicking the down arrow to the right of the **Exclude Status** field.
4. Click **OK**.

Current Events Base Query

Set Parameters

Options

Days Out

Events This Month

Exclude Status



Closed;Cancelled

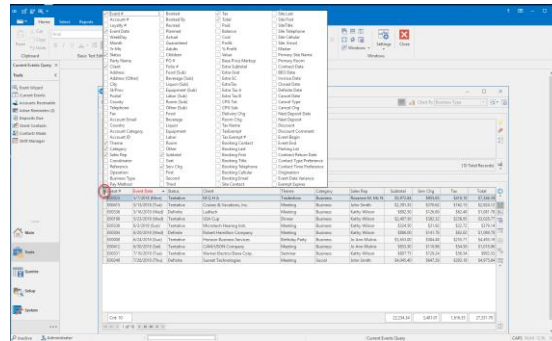
Don't Show Window

OK Cancel

See [Tracking Current Events](#)

Customizing Grid Columns

1. Generate a query.
2. Click the **Quick Column Customizing** button , located at the top left-hand corner of a detail grid.
3. Click into the checkbox next to any column heading to have that column appear in the grid.
4. Click the **Save Current Window Settings** button  to retain your settings.




See [Working with Grids](#)


Sorting Grid Data

1. Click the heading of a column in a grid to sort by that detail in ascending order.
2. Optionally click the same column heading again to sort by that detail in descending order.
3. Hold the **[Shift]** key down on your keyboard and click a second column heading to sort by an additional detail.

Grouping Grid Data



1. From a detail grid, click the **Group By Box** button , located at the upper right-hand side of grid.
2. Hold your left mouse button down on the heading of any column and drag that heading into the pane at the top of the grid.
Note: You may also right-click over a column heading and choose **Group by This Field**.
3. Click the expand button to the left of each group in the grid to display the records in that group.
4. Remove groups by dragging column headings from the **Group By Box** pane back into position among other headings in the grid or by right-clicking in the grid and choosing **Remove from Grouping**.

Filtering Grid Data (Not Available in Express)

1. Float your mouse cursor over any column heading in a grid (without clicking).
2. Click the funnel icon  at the right of the column heading.
3. Click into the checkbox next to any option in the drop-down list to filter by that detail

Event #	Event Date	Status	Client	Theme	Category	Status Rep	Subtotal	Serv Chg	Tax	Total
000000	5/15/2018 (Tue)	Cancelled	Custom-2	Custom & Vacations, Inc.	Meeting	Business	\$2,391.20	\$159.82	\$462.15	\$3,043.17
000036	5/16/2018 (Wed)	Cancelled	Custom-2	Custom & Vacations, Inc.	Meeting	Business	\$392.50	\$126.80	\$62.40	\$581.70
000148	5/16/2018 (Wed)	Cancelled	USA Corp	Course	Business	Kathy Wilson	\$2,467.50	\$882.12	\$128.89	\$3,478.51
000033	6/20/2018 (Sun)	Definite	USA Corp	Course	Business	Kathy Wilson	\$224.50	\$51.92	\$22.72	\$299.14
000004	6/20/2018 (Sun)	Prospective	Robert Hamilton Company	Meeting	Business	Kathy Wilson	\$386.00	\$141.79	\$62.02	\$589.81
000008	6/20/2018 (Sun)	Prospective	Robert Hamilton Company	Meeting	Business	Kathy Wilson	\$386.00	\$141.79	\$62.02	\$589.81
000008	6/20/2018 (Sun)	Prospective	Robert Hamilton Company	Meeting	Business	Kathy Wilson	\$386.00	\$141.79	\$62.02	\$589.81
000412	6/20/2018 (Sun)	Tentative	Camisson Company	Meeting	Business	Jo Ann Malina	\$1,611.00	\$84.40	\$215.71	\$2,511.11
000412	6/20/2018 (Sun)	Tentative	Camisson Company	Meeting	Business	Jo Ann Malina	\$855.50	\$110.96	\$142.50	\$1,109.00
000311	7/10/2018 (Thu)	Tentative	Warner Electric/Data Corp.	Seminar	Business	Kathy Wilson	\$807.75	\$129.24	\$56.56	\$993.55
000040	7/10/2018 (Thu)	Definite	Warner Electric/Data Corp.	Seminar	Business	Kathy Wilson	\$4,044.40	\$447.24	\$200.18	\$4,691.82

Saving Custom Filters

1. Filter your grid as described above.
2. Click the **Filters** button at the top of the grid window.
3. Click **Custom**.
4. Click the **Shared** button if you want this custom filter to be shared with other CaterEase users.
5. Click the **Add Filter** button , located at the top left-hand side of the window.
6. Type a name for your new filter into the field provided.
7. Click the **Save Current Filter** button .

Custom Filters

Apply Filter

Kathy's Meetings

Prospective/Tentative Meetings

Business Meetings

User Shared Customize...

(Category = Business) and (Theme = Meeting)

See [Working with Grids](#)