Exporting Grid Data

- 1. Generate a query, such as an Event Query or Current Events Query.
- 2. Click your right mouse button anywhere within the results grid.
- 3. Select Export Data.
- 4. Choose a format for your export.
- 5. Enter a name for the exported file.
- 6. Click Save.

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Event #		Event Date In Status		Client/Organization	Theme	Category	Sales Rep	Subtotal	Serv Chg	Texes	Total	+
6033990	- 12	of change of 10 and 10 and		Today Show	Seminar	Social	Kathy Wilson	\$538.50	\$26.16	\$37.70	\$662.36	
F03486	11	Expand All		Aquarran	Banguet	Secial	inho Smith	\$2,471.25	\$395.40	\$172.99	\$3,039.64	=
E00403	1-3	Collapse All		Drake	Office Party	Business	John Smith	\$294.50	\$47,12	\$20.62	\$362.24	13
800417		Clear Column Sorting		Fabletics	Meeting	Business	Rosanne M. Mc N	\$514.25 \$3,217.00	\$67.08 \$490.72	\$30.75 \$214.70	\$412.08 \$3,922.42	
E00418				Jurassic World	Banquet	Social	Jo Ann Mulnix					
800474		Select All Records		Today Show	Seminar	Social	Kathy Wilson	\$538.50	\$86.16	\$37.70	\$662.36	-
E00479		Clear Selected Records		Today Show	Seminar	Social	Kathy Wilson	\$697.80		\$48.85 \$37.70	\$858.30 \$662.36	-
E00391		Show Feeter		Today Show	Servinar	Social	Kathy Wilson	\$538.50				
800470	-	Show Nevigation Bar		Ryder Cup	Dinner	Business	Kathy Wilson	\$2,489.50	\$398.32	\$174.27	\$3,062.09	1
	-	Conditional Formatting Color Grid	;									
	6	Export Data	Þ	Excel Spreadsheet (*.xls/klsr)	1							
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				HTML File (".htm)								211
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(See Working with Grids)

Printing Grids

- 1. Generate a query, such as an Event Query or a Current Events Query.
- 2. Click the **Print Grid** button [1]], located on the righthand 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.

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(See <u>Working with Grids)</u>

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

- 1. Generate a query, such as an Event 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 query results screen.
- 4. Type a subject into the <u>Subject</u> 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 <u>Generating Batch Emails</u>)

Additional Resources

Scaling Text Size on Grid Prints Changing the Conjunction in a Query Printing Bar Codes Using Conditional Formatting in Queries



a product of Horizon Business Services, Inc. Naples, FL 34102 T: 239.261.6617 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. Note: Every query has a Base Query window, which allows you to restrict your data prior to establishing any filtering.
- 2. Establish a Date Range or Relative Date Range.
- 3. 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 Greater Than Or Equal To Within Date Range Relative Date Range	5/1/2019 thru 5/31/2019 - This month •
Query Options	
Exclude Status	
None selected	-
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 from your query by clicking the down arrow to the right of the Exclude Status field.
- Click OK. 4.

Current Events Base Query	×
Set Parameters	
Options	
Days Out	
Total Current Events	•
Exclude Status	
None selected	*
Don't Show Window	<u>OK</u> <u>C</u> ancel

(See Tracking Current Events)

Customizing Grid Columns

- 1. Generate a guery, such as an Event Query.
- Click the Quick Column Customizing button . located at the 2. top left-hand corner of a detail grid.
- Click into the checkbox next to any column heading to have that 3. column appear in the grid.
- Click the Save Current Window Settings button is to retain 4. the settings as the default for yourself or for other users on your Caterease network.

(Sorted)							
UID		Telephone		Non Members	Serv Chg		Delivery Chg
LocNum		Fax		PO#	Tax 1		Room Chg
EvtNum		Account Email		Folio #	Tax 2		Tax Name
Location		Country		Food (Sub)	Tax 3		TaxExempt
Region		Account Catego	v E	Beverage (Sub)	Taxes		Tax Exempt #
Event#		Account ID		Liquor (Sub)	Total		Booking Contact
Account	* G	Theme		Faulpment (Sub)	Paid		Booking Last
Lovative		Category		Labor (Sub)	Balance		Booking First
Event Da		Sales Rep		Room (Sub)	Cost		Booking Title
WeekDa		Coordinator		Other (Sub)	Profit		Booking Telephone
Month		Reference		NA (Sub)	S Denfit		Booking Celluler
W-Me		Operation		Food	Value		Booking Email
Status		Business Type		Beverage	Base Price Mi		Site Contact
Party Na		Pay Method		Liquor	Extra Subtota		Site Last
Client/0	rganization	Booked		Equipment	Extra Grat		Site First
Address		Booked By		Labor	Extra SC		SiteTitle
Address	(Other)	Revised		Room	ExtraTax		Site Telephone
City		Planned		Other	Extra Tax A		Site Cellular
St/Prov		Actual		NA	Extra Tax B		Site Email
Postal		Guaranteed		Subtetal	CPG Tet		Master
County		Members		Grat	CPG Sub		Primary Site Name
· Event#	Event Date II.	Status	Client/Org	ganization	Theme	Category	Sales Rep
+ 600390	4/6/2019 (Sat)	Closed	Today Sho	NAR .	Seminar	Social	Kathy Wilson
E00485	4/10/2019 (Wed)	Tentative	Aquaman		Banquet	Social	John Smith
E00403	4/13/2019 (Sat)	Tertative	Drake		Office Party	Business	John Smith
E00417	4/13/2019 (Sat)	Closed	Fabletics		Meeting	Business	Rosanne M. Mc N
E00418	4/14/2019 (Sun)	Tentative	Jurassic We	orld	Banquet	Social	Jo Ann Mulnix
E00474	4/16/2019 (Tue)	Ternative	Today Sho	w	Seminar	Social	Kathy Wilson
E00479	4/19/2019 (Fe)	Tentative	Today Sho	w	Seminar	Social	Kathy Wilson
E00391	4/20/2019 (Sat)	Definite	Today Sho	w	Seminar	Social	Kathy Wilson
E00470	4/26/2019 (Fri)	Definite	Ryder Cup		Dinner	Business	Kathy Wilson

(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.
- Hold the [Shift] key down on your keyboard and click a second 3. column heading to sort by an additional detail.

Grouping Grid Data

- 1. From a query results grid, click the **Group By Box** button located at the upper right-hand side of the 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 query results 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 dropdown list to filter by that detail.

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	Event Date >> 5/1/2019 (Wed)	Status Definite	Client/Organization Today Show	(AII)	Category Social	Sales Rep Kathy Witten	Subtotal \$1,395.60	Serv Chg \$223.30	Taxes \$97.70	Total \$1,716.60	
Event#				(All) (Custom)							
Event #	5/1/2019 (Wed)	Definite Definite Tentative	Today Show	(AI) (Custom) Banquet	Social	Kathy Wilson	\$1,395.60	\$223.30 \$955.65 \$676.00	\$97.70	\$1,716.60 \$7,901.92 \$5,196.75	1
Event # 600477 600023	5/1/2019 (Wed) 5/5/2019 (Sun)	Definite Definite	Today Show Wayne Enterprises	(Ait) (Custom) Banquet Dinner	Social Business	Kathy Witten Resarcts M. Mc N	\$1,395.60 \$6,491.84	\$223.30 \$955.65	\$97.70 \$454.43	\$1,716.60	1
Event # 600023 600487	5/1/2019 (Wed) 5/5/2019 (Sun) 5/7/2019 (Tue)	Definite Definite Tentative	Today Show Wayne Enterprises Presidential Election Committee	(AII) (Custom) Banquet Dinner Meeting	Social Business Social	Kathy Wilson Rosanne M. Mc N John Smith	\$1,395.60 \$6,491.84 \$4,225.00	\$223.30 \$955.65 \$676.00	\$97.70 \$454.43 \$295.75	\$1,716.60 \$7,901.92 \$5,196.75	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Event # E00477 E00023 E00487 E00485	5/1/2019 (Wed) 5/5/2019 (Sun) 5/7/2019 (Tue) 5/8/2019 (Wed)	Definite Definite Tentative Definite	Today Show Wayne Enterprises Presidential Election Committee Coachella	(AI) (Custom) Banquet Dinner Meeting Office Party	Social Business Social Social	Kathy Wilson Rosanne M. Mc N John Smith Kathy Wilson	\$1,395.60 \$6,491.84 \$4,225.00 \$3,141.25	\$223.30 \$955.65 \$676.00 \$502.60	\$97.70 \$454.43 \$295.75 \$219.89	\$1,716.60 \$7,901.92 \$5,196.75 \$3,063.74	
Event # E00023 E00487 E00485 E00481	5/1/2019 (Wed) 5/5/2019 (Sun) 5/7/2019 (Tud) 5/9/2019 (Wed) 5/9/2019 (Thu)	Definite Definite Tentative Definite Definite	Today Show Wayne Enterprises Presidential Election Committee Coachella Today Show	(Custorn) Banquet Dinner Meeting Office Party Seminar	Social Business Social Social Social	Kathy Wison Rosanne M. Mc N John Smith Kathy Wison Kathy Wison	\$1,395.60 \$6,491.84 \$4,225.00 \$3,141.25 \$802.05	\$223.30 \$955.65 \$676.00 \$502.60 \$128.33	\$97.70 \$454.43 \$295.75 \$219.89 \$56.15	\$1,716.60 \$7,901.92 \$5,196.75 \$3,063.74 \$906.53	
Event # E00023 E00487 E00485 E00481 E00404	5/1/2019 (Wed) 5/5/2019 (Sun) 5/7/2019 (Tud) 5/8/2019 (Wed) 5/9/2019 (Wed) 5/9/2019 (Thu) 5/11/2019 (Sd)	Definite Definite Tentative Definite Definite Definite	Today Show Wayne Enterprises Presidential Election Convertee Coachella Today Show Stattoo Oskmont	(Custom) Genquet Dinner Meeting Office Party Seminar Tradeshow	Social Business Social Social Social Business Business Business	Kathy Wisen Rosanne M. Mc N John Smith Kathy Wisen Kathy Wisen Kathy Wisen	\$1,395.60 \$6,491.84 \$4,225.00 \$3,141.25 \$802.05 \$1,901.50	\$223.30 \$955.65 \$676.00 \$102.60 \$128.33 \$245.64	\$97.70 \$454.43 \$295.75 \$219.89 \$36.15 \$133.11	\$1,716.60 \$7,901.92 \$5,196.75 \$1,063.74 \$906.53 \$2,211.25	I was not and the state of the
Event # E0023 E00487 E00485 E00481 E00404 E00404 E00405	5/1/2019 (Wed) 5/5/2019 (Sun) 5/7/2019 (Tue) 5/8/2019 (Wed) 5/5/2019 (Thu) 5/11/2019 (Std) 5/11/2019 (Std) 5/13/2019 (Mon) 5/14/2019 (Tue)	Definite Definite Tentative Definite Definite Definite Definite	Today Show Wayne Entarprises Presidential Election Corrwritee Coachella Today Show Statthon Oskinscet Misistry Of Magic	(Custorn) Banquet Dinner Meeting Office Party Seminar	Social Business Social Social Social Business Business Business	Kathy Wisen Rosanna M. Mc N John Smith Kathy Wisen Kathy Wisen Kathy Wisen Kathy Wisen	\$1,395.60 \$6,491.84 \$4,225.00 \$3,141.25 \$802.05 \$1,901.30 \$2,064.16	\$223.30 \$955.65 \$676.00 \$102.60 \$128.33 \$205.64 \$319.46	\$97.70 \$454.43 \$295.75 \$219.89 \$56.15 \$133.11 \$139.30	\$1,716.60 \$7,901.92 \$5,196.75 \$3,063.74 \$906.53 \$2,281.25 \$2,523.42	and the state of t
E00023 E00487 E00485 E00481 E00431 E00431 E00435 E00435 E00435	5/1/2019 (Wed) 5/5/2019 (Sun) 5/7/2019 (Tue) 5/8/2019 (Wed) 5/5/2019 (Thu) 5/11/2019 (Std) 5/11/2019 (Std) 5/13/2019 (Mon) 5/14/2019 (Tue)	Definite Definite Tentative Definite Definite Definite Definite Definite Tentative	Today Show Wayne Enterprises Presidential Election Convenitee Coachelle Today Show Stutton Osimont Ministry Of Magic Winterfel Social Society	(Custom) Genquet Dinner Meeting Office Party Seminar Tradeshow	Social Business Social Social Social Fusiness Fusiness Fusiness	Kathy Wilson Rosanne M. Mc N John Smith Kathy Wilson Kathy Wilson Kathy Wilson Kathy Wilson	\$1,395.60 \$6,491.84 \$4,225.00 \$3,141.25 \$802.05 \$1,901.50 \$2,064.16 \$8992.50	\$223.30 \$955.65 \$676.00 \$502.60 \$128.33 \$246.64 \$319.46 \$319.46 \$126.00	\$97.70 \$454.43 \$295.75 \$219.89 \$56.15 \$133.11 \$139.30 \$62.48	\$1,716.60 \$7,901.92 \$5,196.75 \$3,063.74 \$996.53 \$2,281.25 \$2,523.42 \$1,081.78	

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.

5.

- 4. Click the Shared button if you want this custom filter to be shared with other Caterease users in your network (Professional version).

 - Click the Add Filter button , located at the top lefthand side of the window.
- Type a name for your new filter into the field provided. 6.
- 7. Click the Save Current Filter button

🛟 Custom Filters	
0 0 H X	🗲 Apply Filter
Kathy's Definite Parties	
Definite Social Events	
 Business Meetings 	
Luser 💁 Shared	Customize

(See Worki	ng with Grids
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