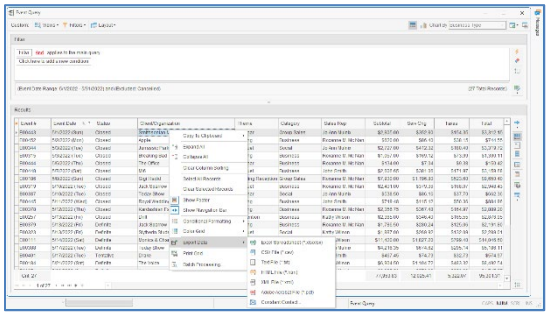
Exporting Grid Data

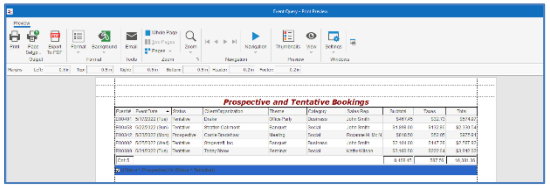
1. Generate a query, such as an Event Query or Current Events Query.
2. Click your right mouse button anywhere within the results grid.
3. Select **Export Data**.
4. Choose a format for your export.
5. Enter a name for the exported file.
6. Click **Save.**



(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 , 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 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 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

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

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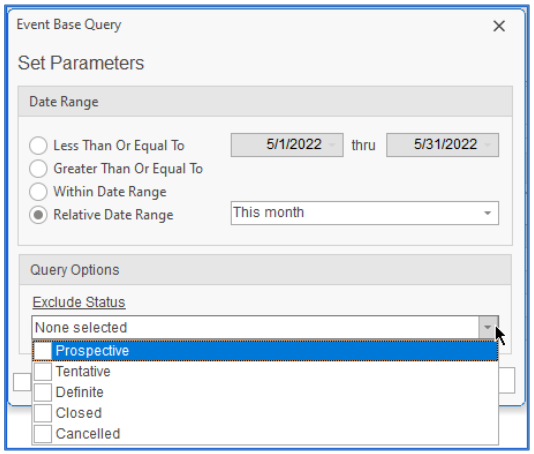
Quick Reference Guide

Query Tools

www.caterease.com

Running an Event Query

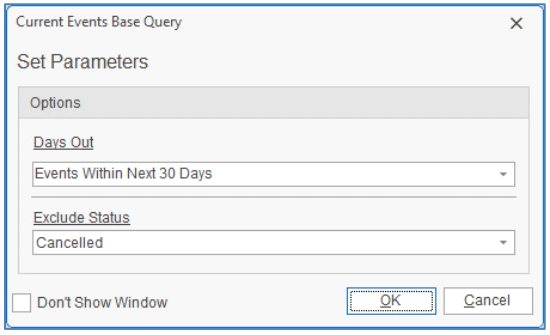
1. Click the **Event Query** button from the **Queries** sidebar.
   Note: *Every query has a Base Query window, which allows you to restrict your data prior to establishing any filtering.*
2. Establish a **Date Range** or **Relative Date Range**.
3. Optionally exclude any desired statuses from your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



(See Querying Events)

Tracking Your Current Events

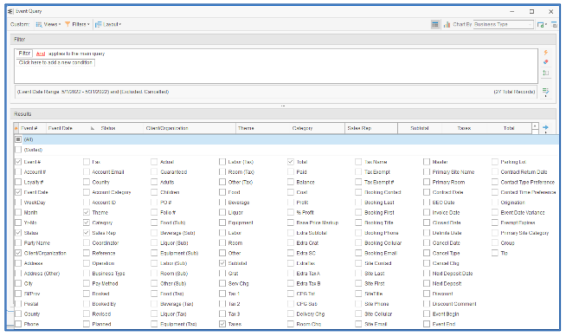
1. Click the **Current Events** button from the **Tools** sidebar.
2. Click the down arrow to the right of the Days Out field and choose how many days out you would like your search to go.
3. Optionally exclude any event statuses from your query by clicking the down arrow to the right of the Exclude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



(See Tracking Current Events)

Customizing Grid Columns

1. Generate a query, such as an Event 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 the settings as the default for yourself or for other users on your Caterease network.



(See Working with Grids)

Sorting Grid Data

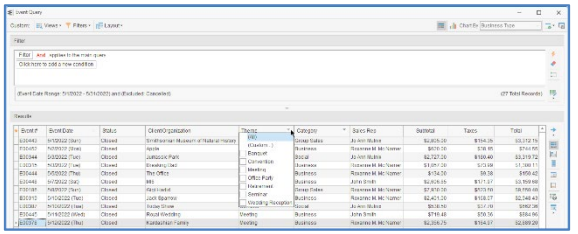
1. Click the heading of a column in a grid to sort by that detail in ascending order.
2. Optionally click the same column heading again to sort by that detail in descending order.
3. Hold the **[Shift]** key down on your keyboard and click a second column heading to sort by an additional detail.

Grouping Grid Data

1. From a 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**.

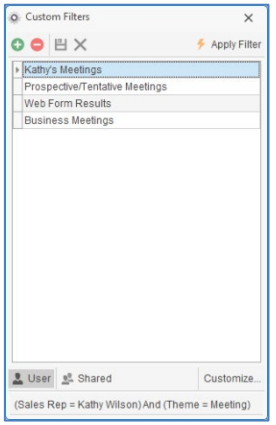
Filtering Grid Data (Not Available in Express)

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 drop-down list to filter by that detail.



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 in your network (*Professional version).*
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.



(See Working with Grids)