



2016 - Fall Edition

## User Guide - Table of Contents

[Overview](#)

[Use Case\(s\)](#)

[Accessing the Tool](#)

[General Functionality](#)

[Add/Edit/Delete/Auto-Resize Columns](#)

[Grid Search](#)

[Auto Filter Row](#)

[Filtering](#)

[Sorting](#)

[Exporting to Excel](#)

[Refresh/Auto Refresh](#)

[Advanced Functionality](#)

[Group-By](#)

[Multi Edit](#)

[Custom Grid Layout](#)

[Advanced Filtering](#)

[Conditional Formatting](#)

[Best Practices](#)

[Common Questions and Concerns](#)

# Overview

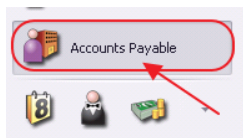
Grids appear throughout the Office Modules and display records of data utilizing vertical and horizontal lines to subdivide data fields. Grids provide easy access and ways to view and filter additional details and information associated with the specific records of the selected Module. Grid functionality is consistent throughout the modules.

## Use Case(s)

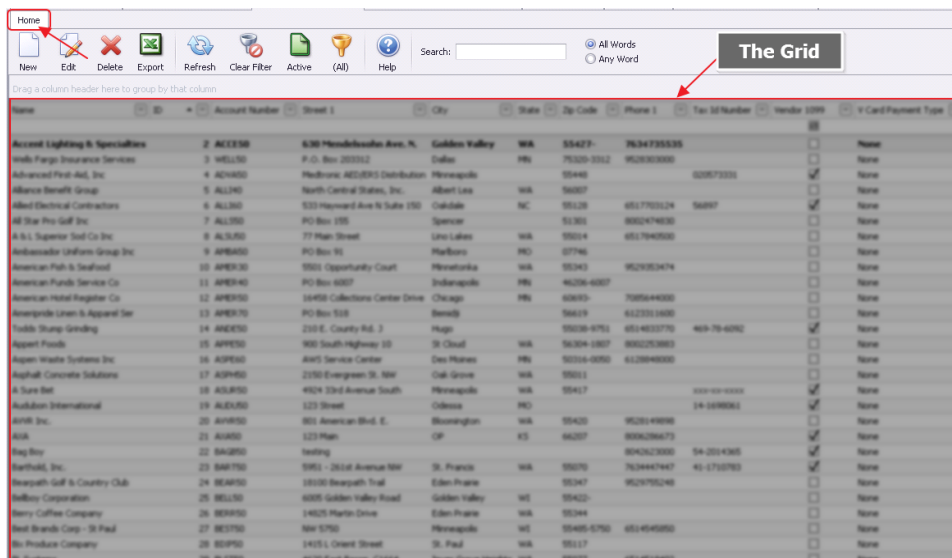
A Club is reviewing records of data within the Accounts Payable module, and would like to add an additional column of data to the grid, so they can see all balances for the Vendors that are over 90 days. After adding the column, the Club would like to add a filter to the grid that will show only Vendors with balances over 90 days. The Club would then like to sort the data by highest balance to lowest balance within the grid, and then export the data into Excel for further analysis.

## Accessing the Tool

To access a Grid, click on a Module (for example, Accounts Payable.)



When clicking any module, the **Default grid** will open on the **Home** tab.



The Home Tab displays the **default** Module information. For example:

**Accounts Payable Module** opens **Manage Vendors Grid**

**Employees** opens **Manage Employees Grid**

**Membership** opens **Manage Members Grid**

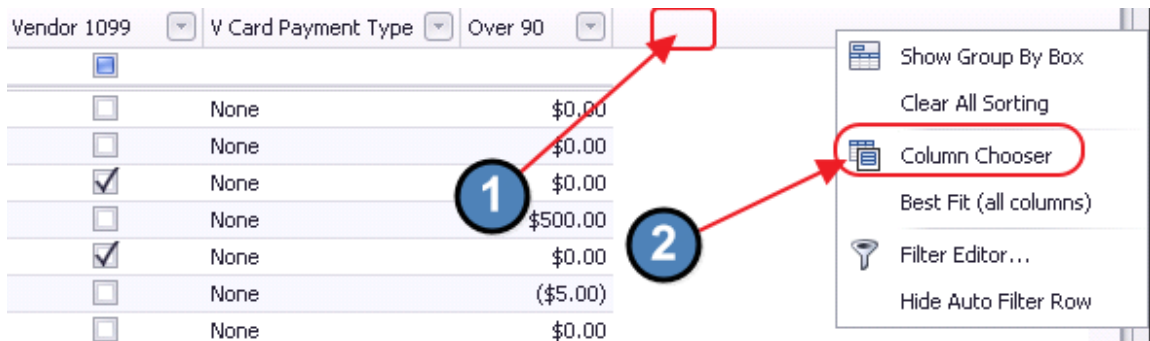
## General Functionality

### Add/Edit/Delete/Auto-Resize Columns

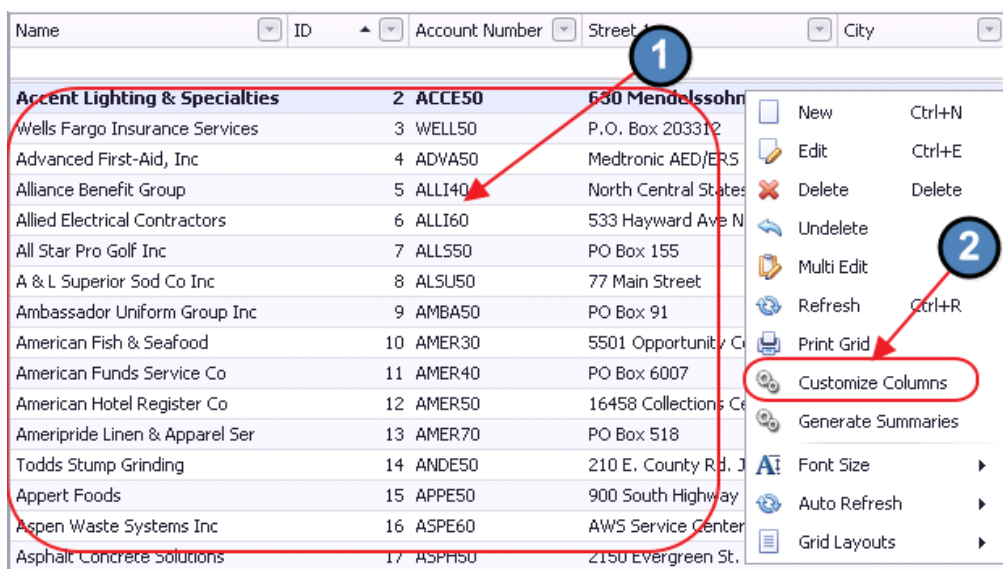
Each Grid has columns that display relevant information for the Module.

Add or delete columns from the Grid one of two ways.

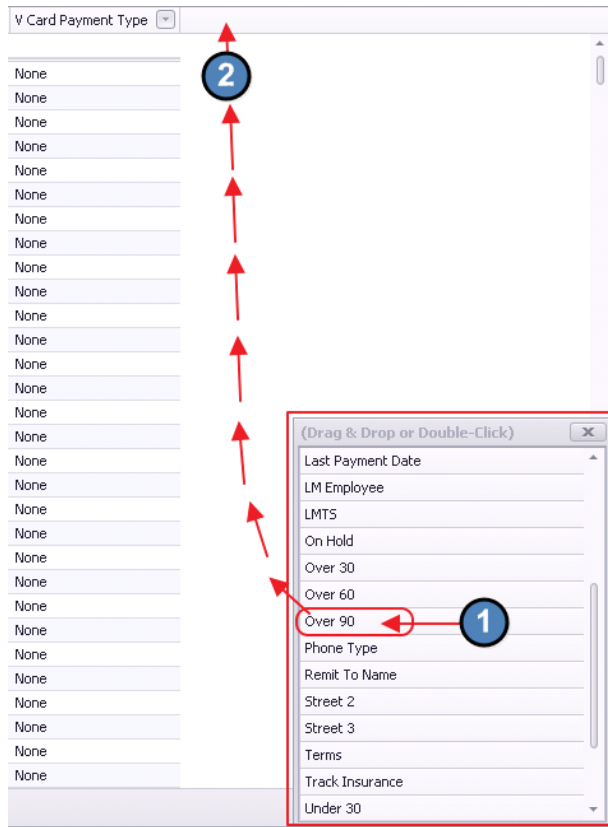
- 1) Right click in the Column Header, and select **Column Chooser**.



- 2) Or, right click anywhere within the grid and select **Customize Columns**.



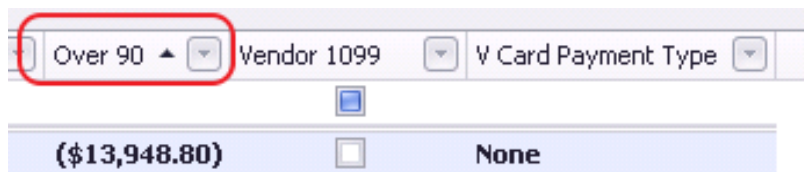
Both methods open another interface that lists the available columns to add to the grid. Add the column to the Grid by double clicking on the field name, or by dragging and dropping the field into the column header.



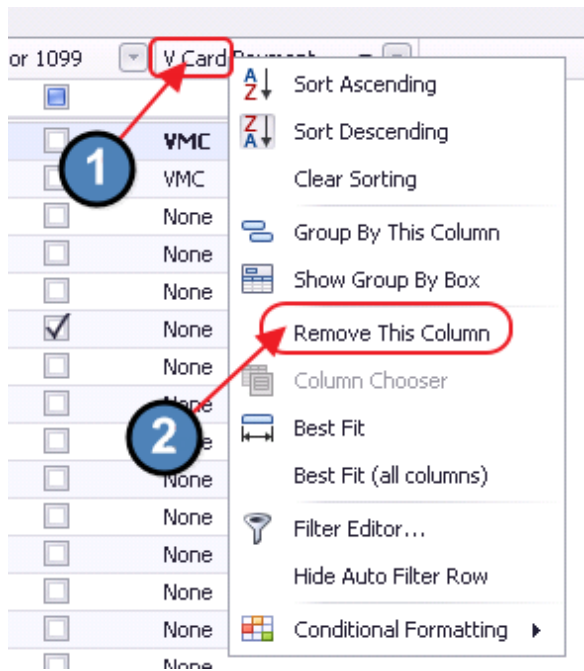
Organize grid columns by simply selecting the column title in the column header and dragging the column to the desired new location.



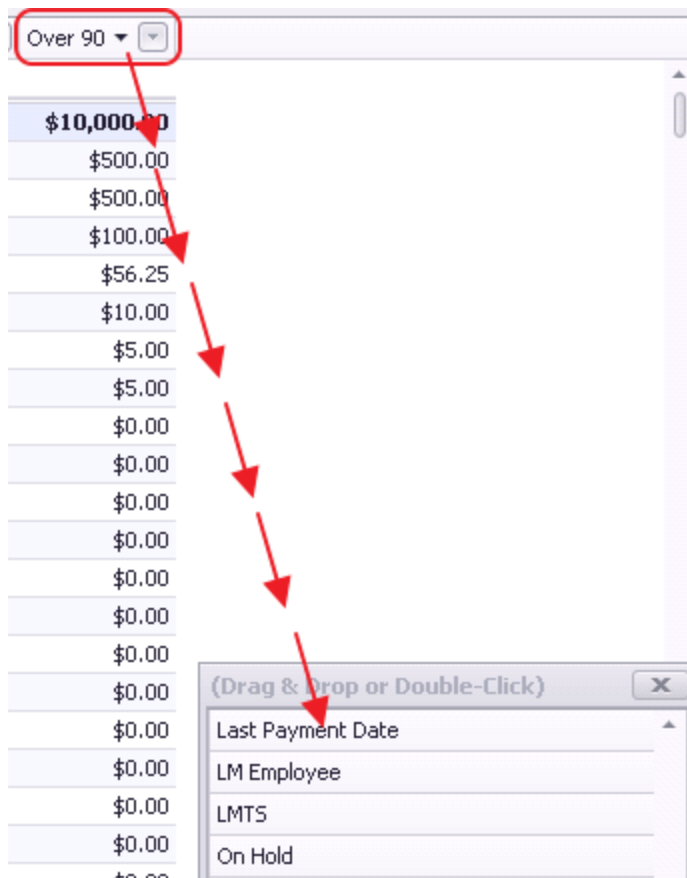
New column position results.



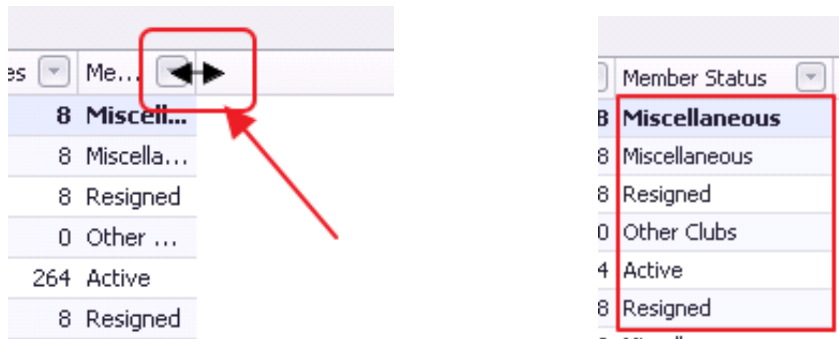
To remove a column, right click on the column title and select **Remove This Column**.



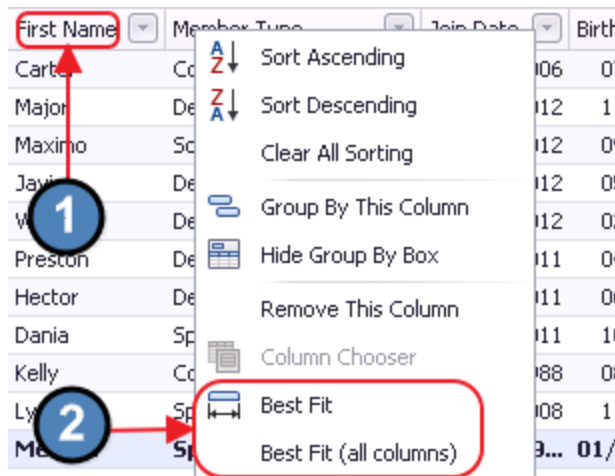
Or, drag the column back into the Drag & Drop Column Chooser tool.



To auto-resize a column so that the entire width of the column is shown, hover over the far right side of the column heading until a black two-headed arrow appears. Then, double-click. Column width will resize appropriately.

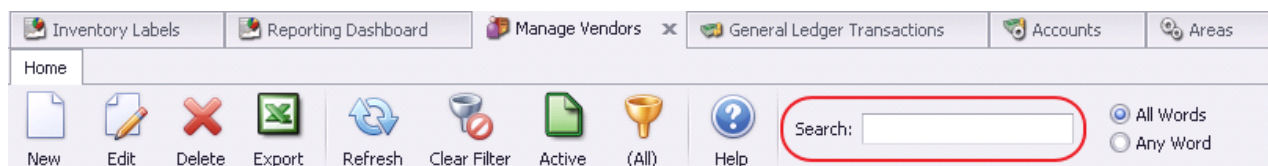


Or, right-click in the column header, and choose **Best Fit** (for a specific column), or **Best Fit (all columns)**.



## Grid Search

Most grids have search functionality.



The Module Search feature is smart and finds the search word in all the columns available as the word is typed. For instance, typing the word **Best** in the main search field for the Item Module brings up **any** Item with the word **Best** included. Searches can be narrowed by using the Auto Filter Row search feature (discussed in next section).

Name	ID	Account Number	Street 1	City	State	Zip Code	Phone 1
Best Brands Corp - St Paul	27	BEST50	NW 5750	Minneapolis	WI	55485-5750	6514545850

The **All Word** feature, when selected, looks for **every** word in the grid that matches the search criteria. For example, if the search criteria is Tee Times, then the search is looking for both words together to return a response.

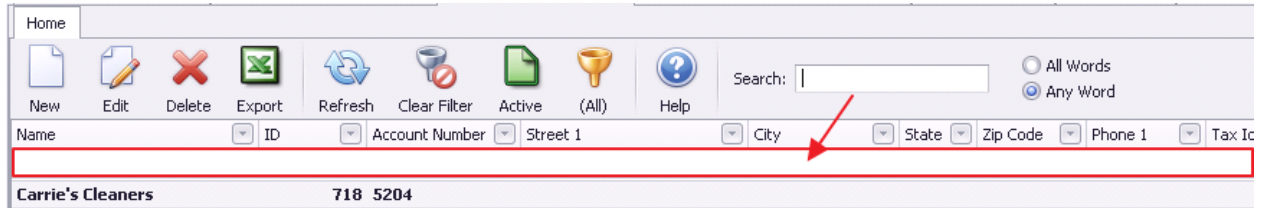
Name	ID	Account Number	Street 1	City	State	Zip Code	Phone 1
Tee Times Press	384	TEET50	W11052 457th Avenue	Prescott	WA	54021-	

The **Any Word** feature looks for any word that matches the search criteria. For example, if the search criteria is Mark Sherman, the search may return Mark only or Sherman only responses.

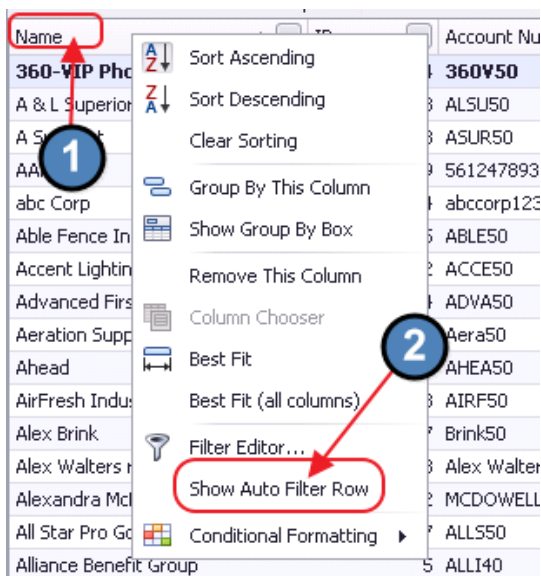
Member Number	Age	Last Name	First Name	Member Type	Join Date	Birthda...	Phone	Email
X5003	74	Rhoads	Antony	Resigned Archive	09/15/19...	01/01/1942	(651) 483-4...	mark@clubsoft.net
780	70	Henley	Mark	Social	12/01/1994	05/31/1946	(651) 483-8625	
49	64	Wilks	Markus	Corporate Golf Junior	04/01/2010	03/06/1952	(651) 269-8666	GregAFouks@clubsoft.net
256	56	Potts	Sherman	Corporate Golf Junior	03/01/2004	06/20/1960	(651) 415-1667	dbkato@clubsoft.net
312	54	Blunt	Bradly	Deferred Golf	05/16/2012	05/05/1962	(651) 765-0882	mark.cossack@clubsoft.net
278A	51	Mccloud	Katherine	Sp-Corporate Golf	08/21/2001	06/04/1965	(651) 494-3840	annandmarkheller@clubsoft.
278	51	Mccloud	Marcel	Corporate Golf Junior	08/21/2001	11/30/1964	(651) 494-3840	annandmarkheller@clubsoft.
116	49	Gallagher	Nicholas	Corporate Golf Junior	03/01/2001	01/18/1967	(651) 766-3843	mark.lubratt@clubsoft.net
201	48	Ott	Abraham	Corporate Golf Junior	02/28/2005	04/18/1968	(651) 429-4702	mark.auth@clubsoft.net
163	42	Merchant	Willie	Deferred Golf	04/13/2011	04/28/1974	(651) 481-7994	MarkHokanson@clubsoft.net
916	39	Perez	Timothy	Junior Corp Golf	11/15/1999	03/06/1977	(651) 271-0663	Mark.LaBounty@clubsoft.net
X10199A		Mock	Markita	Resigned Archive				
X10211		Ainsworth	Tamica	Resigned Archive				markstankey@clubsoft.net

## Auto Filter Row

Below the column titles (in Grid format) is an empty field used to search for results in a specific column.

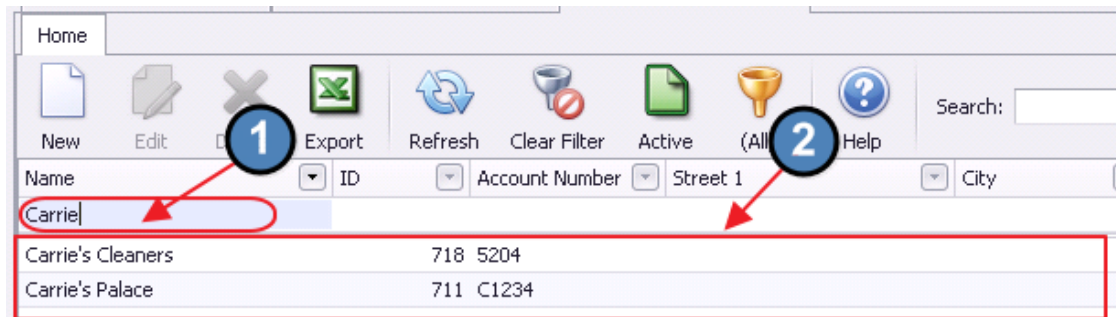


If the empty field is not visible, turn on the field by right clicking on any column title and select **Show Auto Filter**.



Click in the blank field under the column heading for the column to be searched, and type a word or words.

Search results will return in the grid below based on All Words typed.



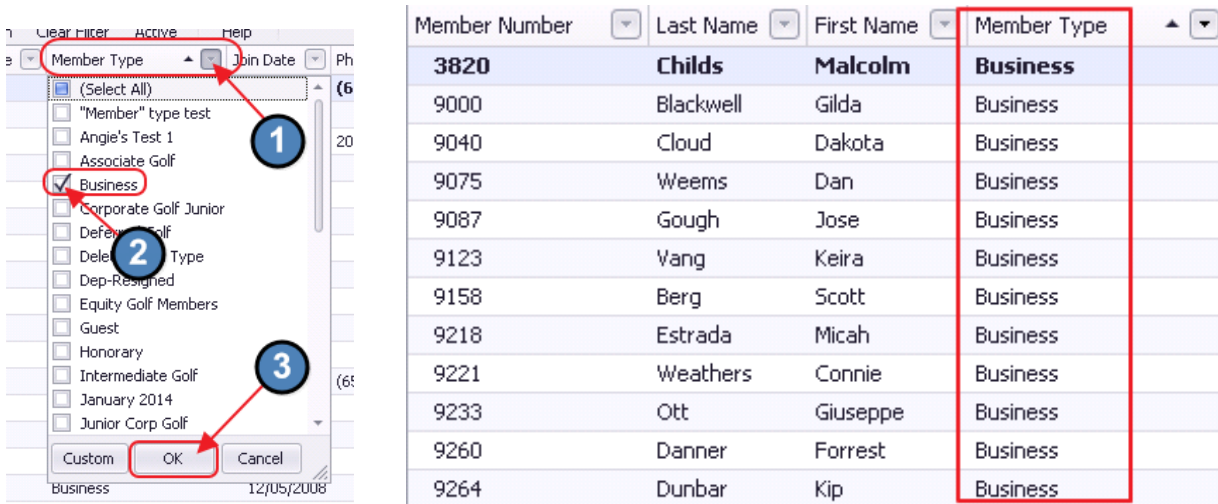


Alternatively, to turn off the Auto Filter, click on **Hide Auto Filter**.

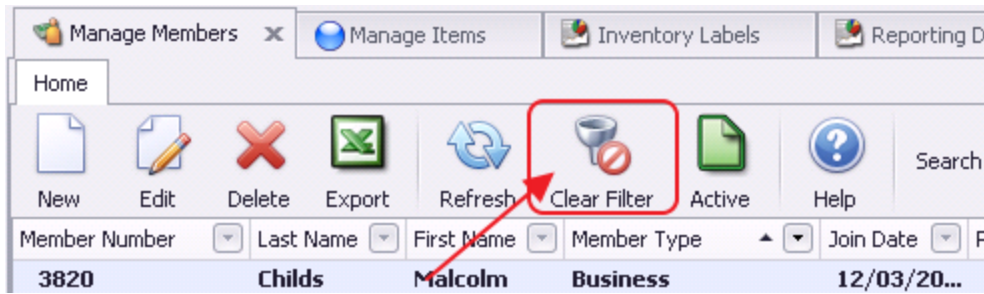


## Filtering

Columns may be filtered by **selecting** the specific **category** to display. Select the **down arrow** next to the **Column Title** and select the items to be displayed. For instance, from the Manage Members Grid, filter to only show members in a certain member type. Grid will return results based on set filter.



To clear set filters from the grid and return all results, click the **Clear Filter** icon.

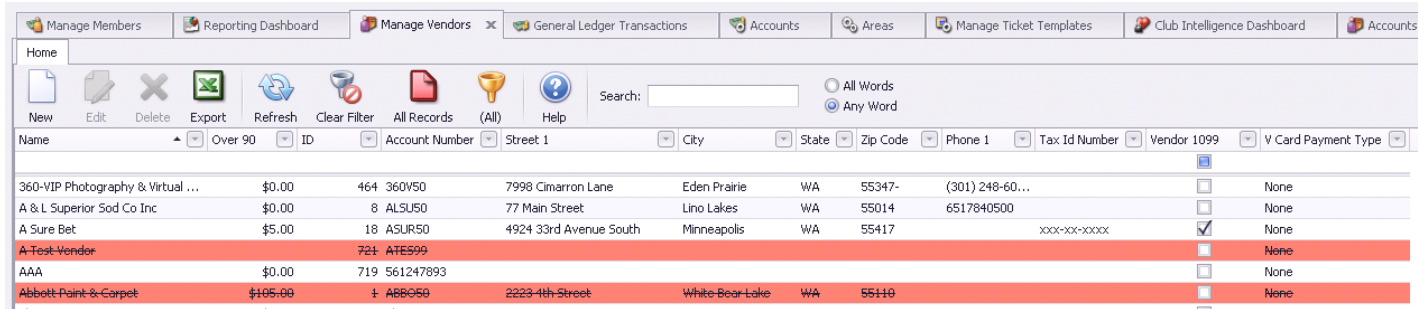


A built-in **Filter** for **Active/All Records** has been included in the toolbar.

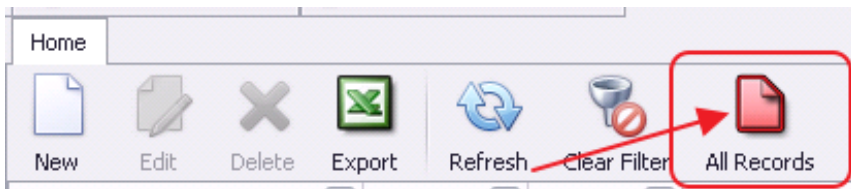
To view **All** records, click the **Active** icon.



Note the Grid displays all records and highlights deleted or inactive records in a different color.



To return to viewing **Active** records, click the **All Records** icon.

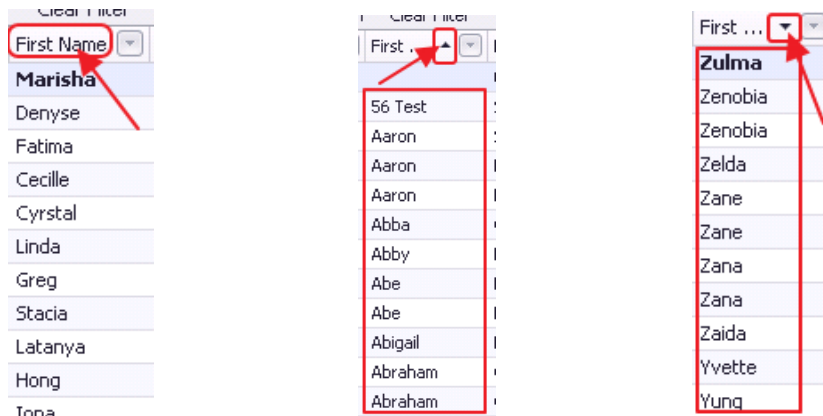


## Sorting

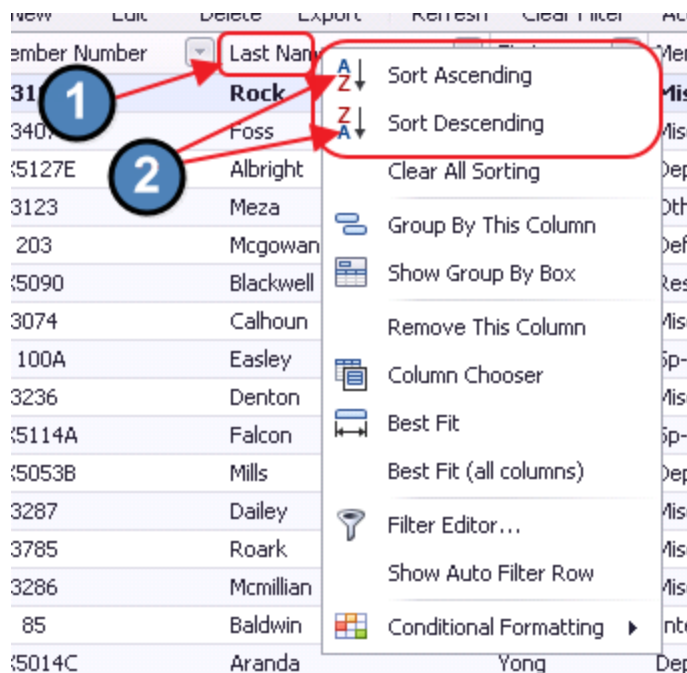
Specific column headers can be filtered to display data in **Ascending or Descending** order.

For text fields, ascending order will display A-Z, and descending order will display Z-A. For numeric fields, ascending order will display least amount to greatest amount, and descending order will display greatest to least.

To sort in ascending or descending order, click the Column Name. A small (up) arrow will appear in the Column header, and the data will display in ascending order. Clicking the arrow when it is up, will turn the arrow down, and display the data in descending order. Conversely, clicking the arrow when it is down, will turn the arrow up, and will again display the data in ascending order.



Another way to access the sort function is to right-click on the Column Title. Then, choose the desired order to sort from the displayed menu.

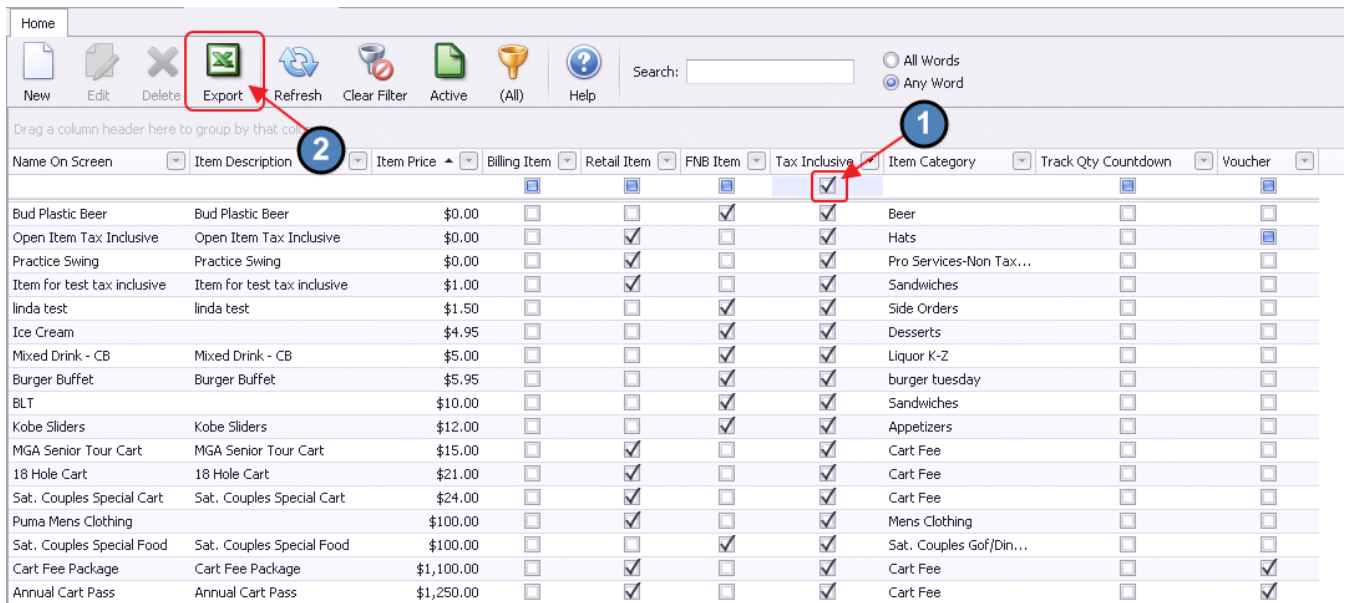


## Exporting to Excel

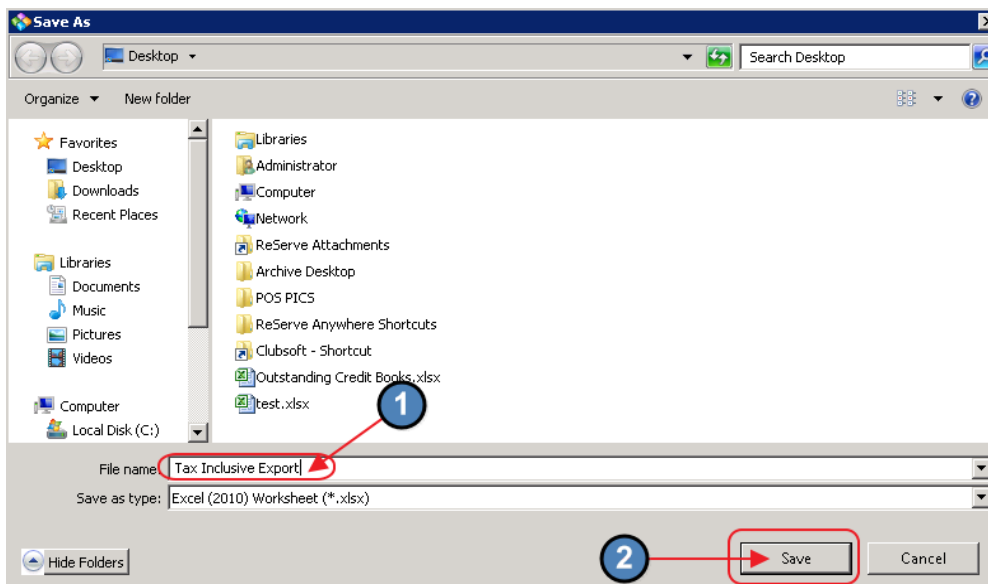
Grids can be easily exported to **Excel**. This feature provides a great resource for reporting purposes and/or additional analysis.

For instance, let's assume a club wants a list of all **items** in the system that are marked as **Tax Inclusive**.

- First, **filter** the grid to only show items that are marked as **Tax Inclusive**.
- Then select the **Export** tool on the Tool Bar. This will export the current grid to **Excel**.



Name the file, designate the location to save, and click Save.

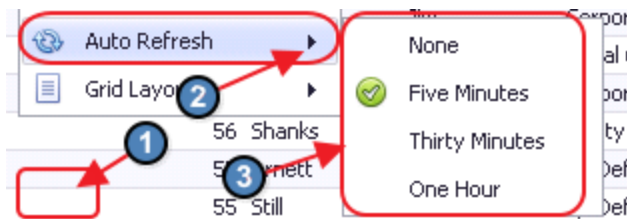


Open the Excel file to view.

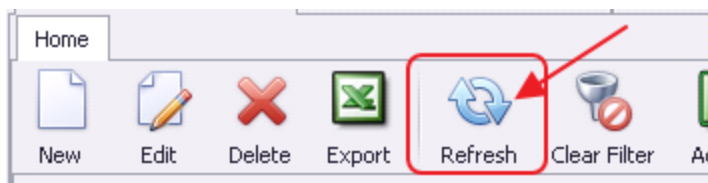
	A	B	C	D	E	F	G	H	I	J
1	Name On Screen	Item Description	Item Price	Billing Item	Retail Item	FNB Item	Tax Inclusive	Item Category	Track Qty Countdown	Voucher
2	Bud Plastic Beer	Bud Plastic Beer	\$0.00	Unchecked	Unchecked	Checked	Checked	Beer	Unchecked	Unchecked
3	Open Item Tax Inclusive	Open Item Tax Inclusive	\$0.00	Unchecked	Checked	Unchecked	Checked	Hats	Unchecked	Indeterminate
4	Practice Swing	Practice Swing	\$0.00	Unchecked	Checked	Unchecked	Checked	Pro Services-Non Taxable	Unchecked	Unchecked
5	Item for test tax inclusive	Item for test tax inclusive	\$1.00	Unchecked	Checked	Unchecked	Checked	Sandwiches	Unchecked	Unchecked
6	linda test	linda test	\$1.50	Unchecked	Unchecked	Checked	Checked	Side Orders	Unchecked	Unchecked
7	Ice Cream		\$4.95	Unchecked	Unchecked	Checked	Checked	Desserts	Unchecked	Unchecked
8	Mixed Drink - CB	Mixed Drink - CB	\$5.00	Unchecked	Unchecked	Checked	Checked	Liquor K-Z	Unchecked	Unchecked
9	Burger Buffet	Burger Buffet	\$5.95	Unchecked	Unchecked	Checked	Checked	burger tuesday	Unchecked	Unchecked
10	BLT		\$10.00	Unchecked	Unchecked	Checked	Checked	Sandwiches	Unchecked	Unchecked
11	Kobe Sliders	Kobe Sliders	\$12.00	Unchecked	Unchecked	Checked	Checked	Appetizers	Unchecked	Unchecked
12	MGA Senior Tour Cart	MGA Senior Tour Cart	\$15.00	Unchecked	Checked	Unchecked	Checked	Cart Fee	Unchecked	Unchecked
13	18 Hole Cart	18 Hole Cart	\$21.00	Unchecked	Checked	Unchecked	Checked	Cart Fee	Unchecked	Unchecked
14	Sat. Couples Special Cart	Sat. Couples Special Cart	\$24.00	Unchecked	Checked	Unchecked	Checked	Cart Fee	Unchecked	Unchecked
15	Puma Mens Clothing		\$100.00	Unchecked	Checked	Unchecked	Checked	Mens Clothing	Unchecked	Unchecked

## Refresh/Auto Refresh

The Grid is set to auto-refresh in a certain amount of time. To designate the time interval for the refresh, right-click on the grid, select Auto Refresh, and choose the desired interval.



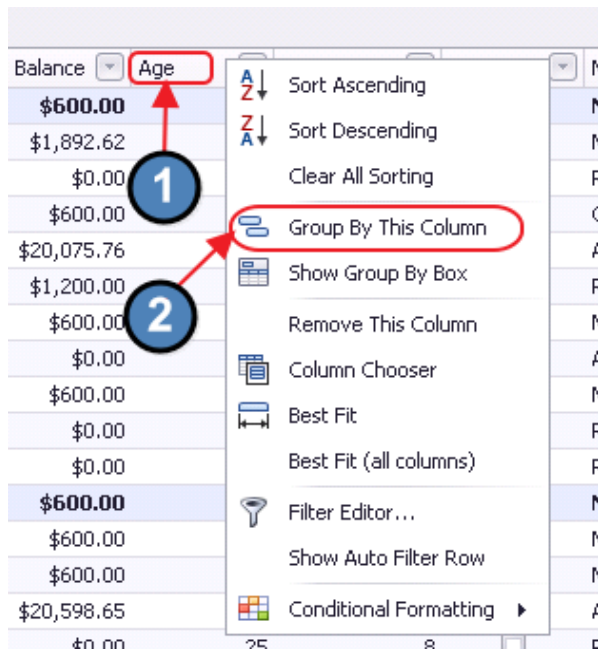
To force a manual refresh at any time, click the **Refresh** icon.



# Advanced Functionality

## Group-By

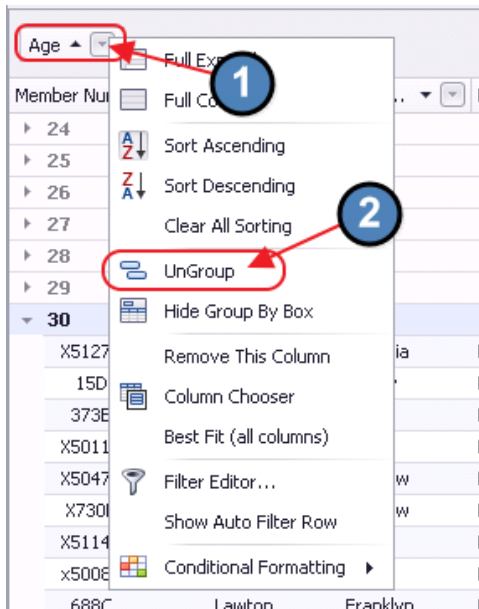
To Group the display by a specific column, right-click on the Column Heading, and choose **Group by This Column**.



Note how the results display, and can be expanded to view detailed records within the grouping.

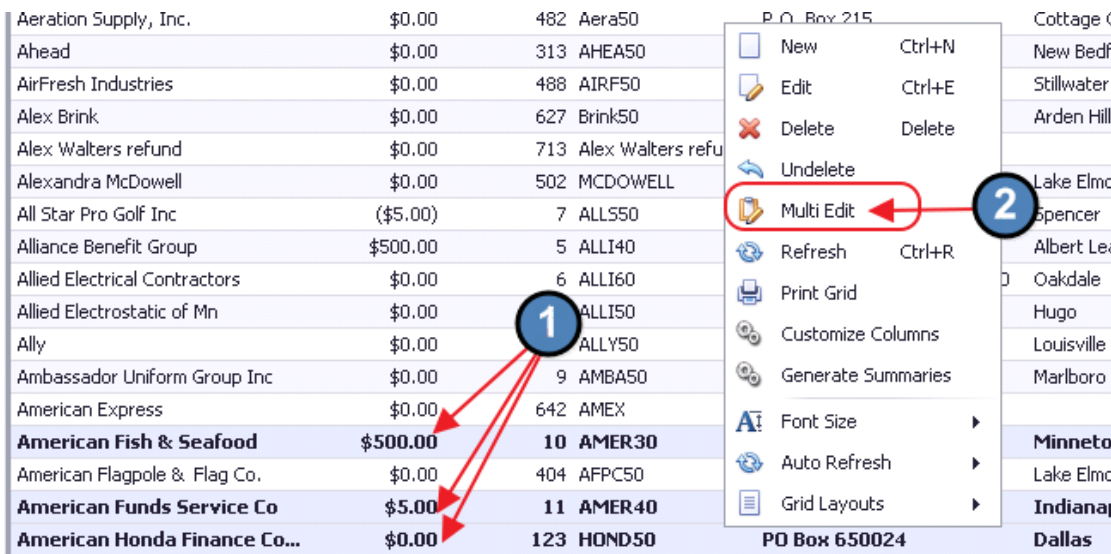
Age ▾											
Member Number	Last Name	First ...	Member Type	Join Date	Birthda...	Phone	Email	Current Balance	Status Rules	Deleted	Member Status
▶ 24											
▶ 25											
▶ 26											
▶ 27											
▶ 28											
▶ 29											
▾ 30											
X5127E	Albright	Zenobia	Dep-Resigned	09/01/1991	01/27/1986			\$0.00	8	<input type="checkbox"/>	Resigned
15D	Burk	Randy	Dep-Resigned	11/01/1997	12/01/1985			\$0.00	8	<input type="checkbox"/>	Resigned Dependent
373B	Seward	Pedro	Dep-Resigned	11/23/1998	08/31/1985			\$0.00	8	<input type="checkbox"/>	Resigned Dependent
X5011C	Bonds	Michel	Dep-Resigned	08/01/1992	11/21/1985			\$0.00	8	<input type="checkbox"/>	Resigned Dependent
X5047E	Ellsworth	Mathew	Dep-Resigned	09/20/1990	03/15/1986			\$0.00	8	<input type="checkbox"/>	Resigned Dependent
X730D	Chastain	Mathew	Dep-Resigned	05/01/1991	01/11/1986			\$0.00	8	<input type="checkbox"/>	Resigned Dependent
X5114B	Falcon	Kevin	Dep-Resigned	12/18/2001	03/26/1986			\$0.00	8	<input type="checkbox"/>	Resigned
x5008C	Hightower	Jackie	Resigned Archive	01/16/2008	07/28/1986			\$0.00	8	<input type="checkbox"/>	Resigned
688C	Lawton	Franklyn	Dep-Resigned	03/15/1994	12/26/1985			\$0.00	8	<input type="checkbox"/>	Resigned Dependent
▶ 31											
▶ 32											
▶ 33											
▶ 34											

To remove the grouping, right-click on the Grouped Column heading, and choose **UnGroup**.

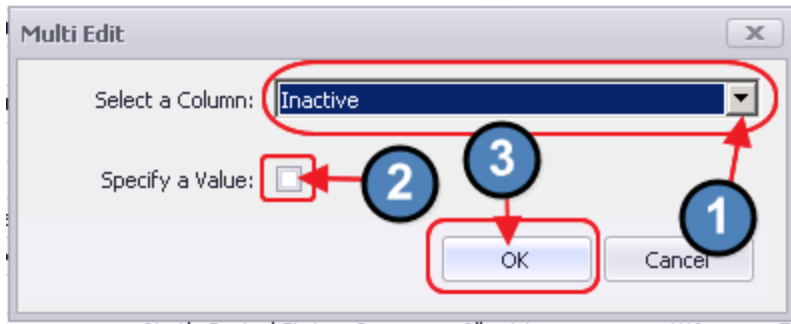


## Multi Edit

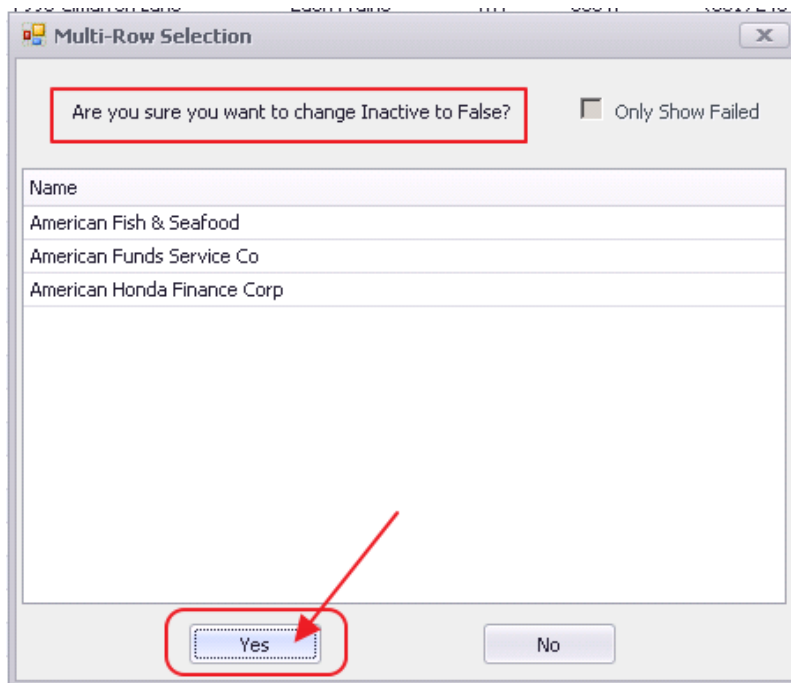
The Multi Edit function allows a User to easily change values for multiple records at one time. To use this function, select the desired records from the grid (hold CTRL while selecting records with mouse). Then, right-click on the grid, and choose, **Multi Edit**.



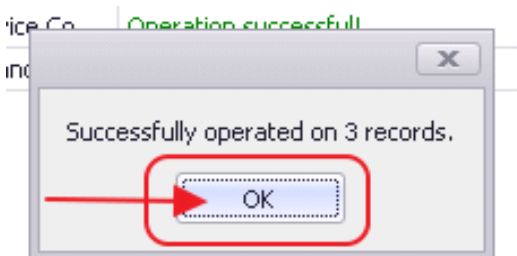
Next, **select a Column** utilizing the drop-down arrow. In the event, the selected Column is to be designated to the specified value, click the **Specify a Value** box. Then, click **OK** to continue.



Next, confirm the change to affect the selected records by clicking **Yes**.

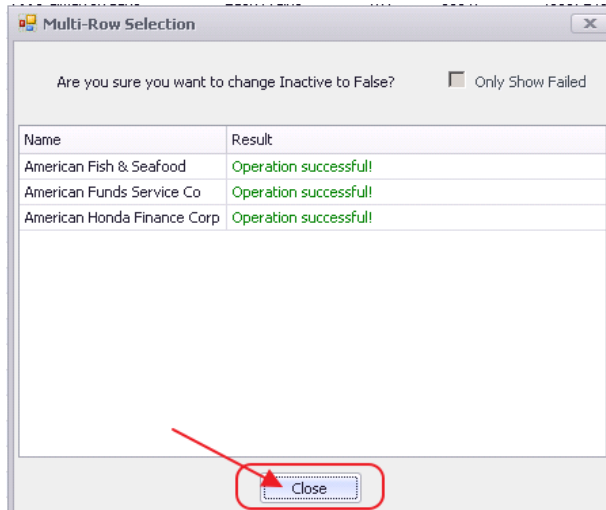


Success message will return (unless **Only Show Failed** option is selected above.) Click **OK**.

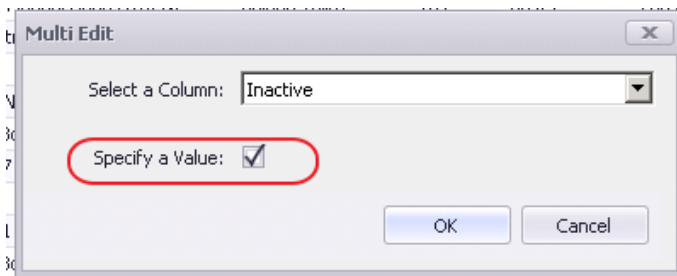


Then, click **Close** to continue.

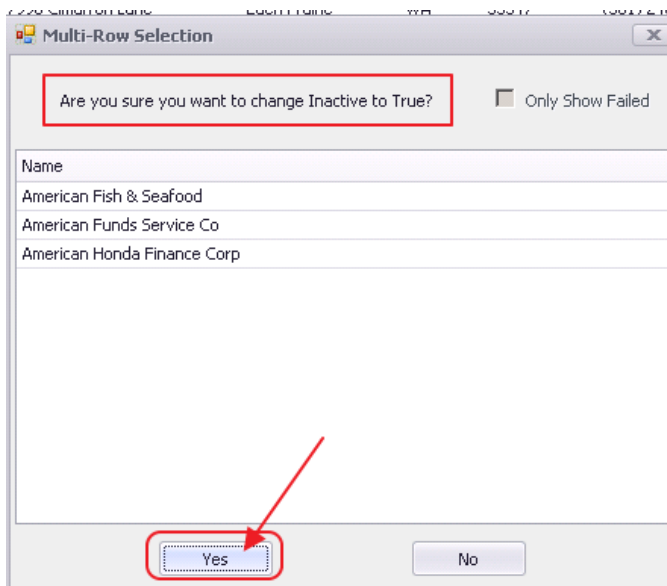




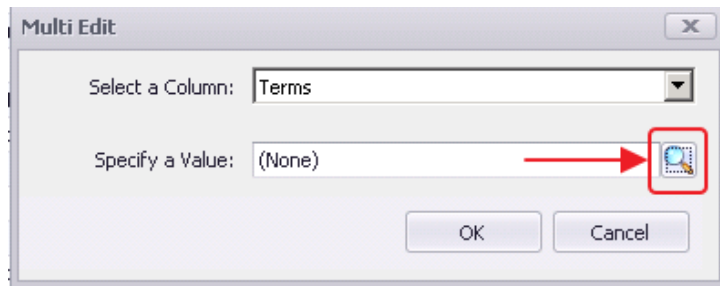
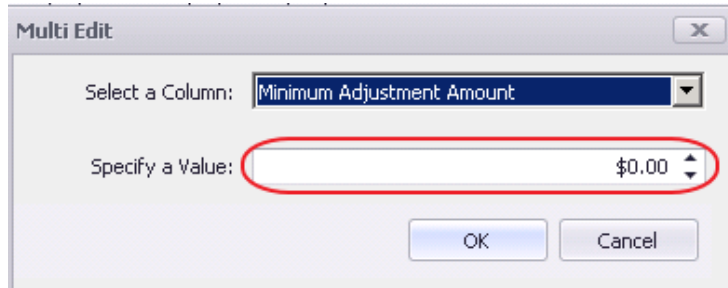
Note, once records were set to Active (Inactive to False), to change them back to Active, again select the Column, and then, Specify a Value.



Note how this impacts the change. Records now change to Inactive, as indicated by the message "...Inactive to True."

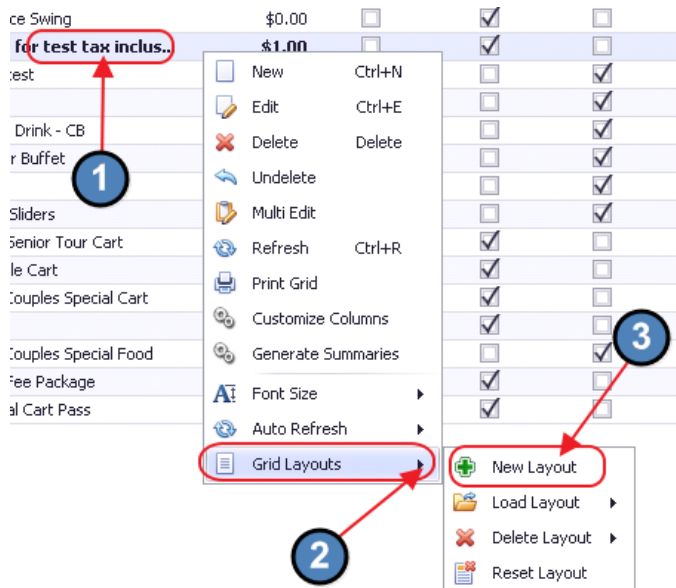


Depending on the Column selected, the Specify a Value field may contain an opportunity to populate a value, or select from a list in addition to simply marking it true.

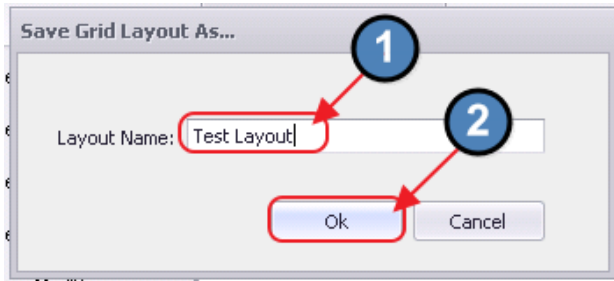


## Custom Grid Layout

Create your own Custom Grid Layout. First, right-click anywhere in the Grid and select **Grid Layouts** then **New Layout**.

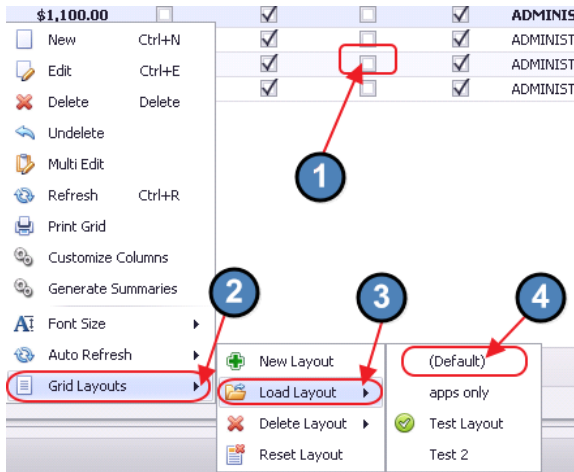


Name the Layout and Select **OK**.



Then, create/filter the grid to fit your needs. Changes will automatically be associated with the newly created customized grid.

To return to the original (Default) grid, right click anywhere in the Grid and select **Grid Layouts, Load Layout,** and click **Default**.

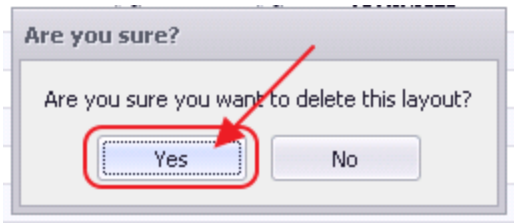


To return to a Customized Grid, follow the above steps, and click the desired Grid in step 4 instead of the Default Layout.

To delete a customized grid (either created in error, or that is no longer serving a purpose), right click anywhere in the Grid and select **Grid Layouts, Delete Layout,** and choose the Layout to delete.



Confirm deletion by clicking **Yes**.



Reset Layout returns the New Grid to the original layout without saving changes.

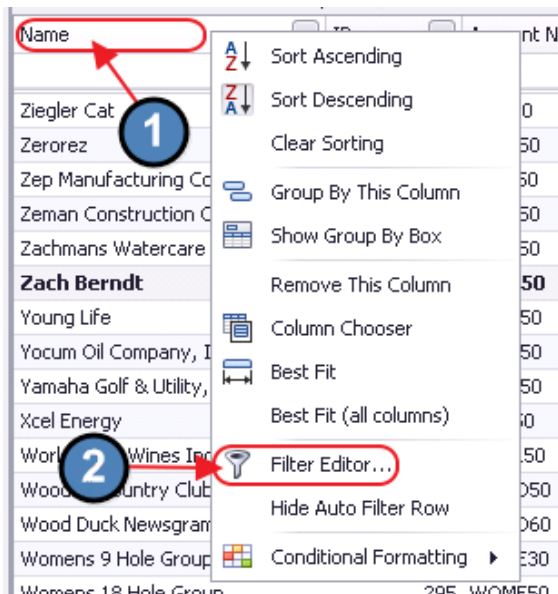
**Notes**

- Customized grids are unique to Individual Modules. (ie - Custom grid created in Accounts Payable Module does not exist within the Membership Module)
- Other users will have the ability to access the Custom Layouts.
- The Module Grid retains the last Grid display options used.

## Advanced Filtering

The Filter Editor provides more advanced filtering capabilities.

The Tool can be accessed by right clicking anywhere on the column headers and selecting **Filter Editor**.



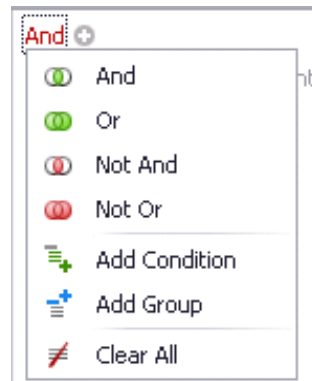
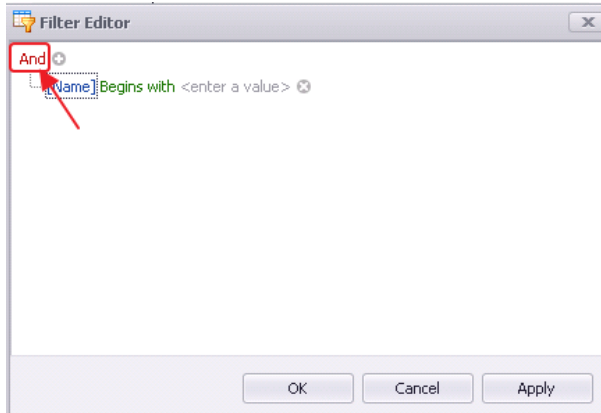
The Filter Editor works as a string value system that can be filtered to include more specific criteria.

# Parameters

## Operands

Click **And** to launch the Operand menu selector.

Options include And, Or, Not And, and Not Or. Conditions or Groups may also be added.

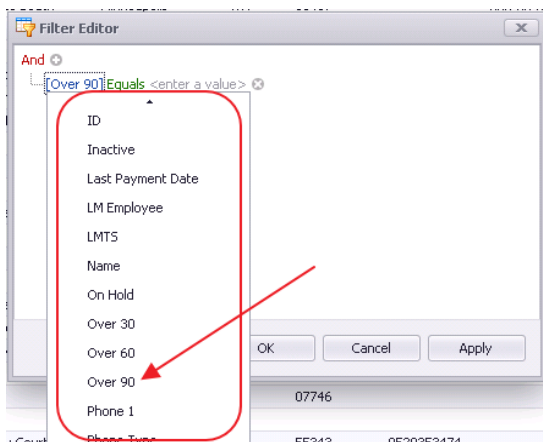


## Columns

Options available will depend on the specific Grid in use. Click blue field to view available column options.

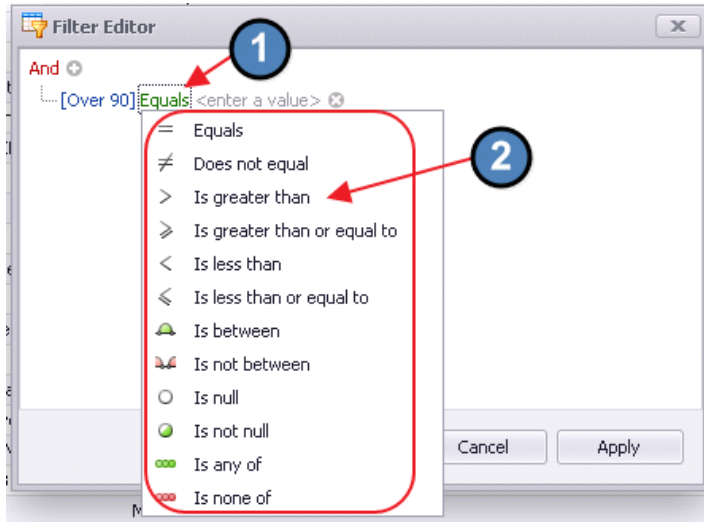


Click on desired field.



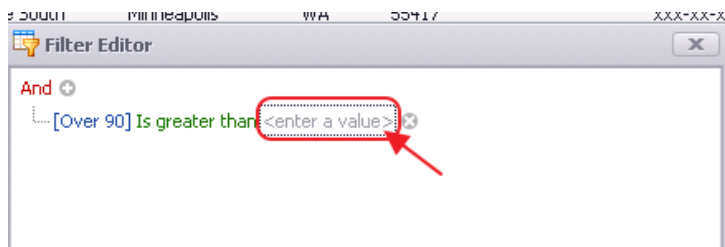
## Operators

Please see available options in screenshot below.

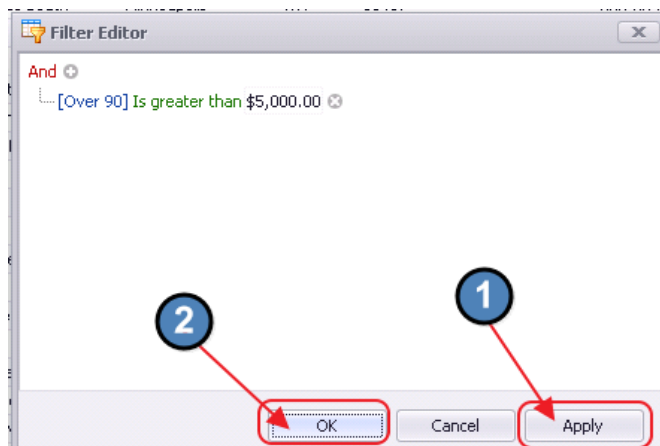


## Value

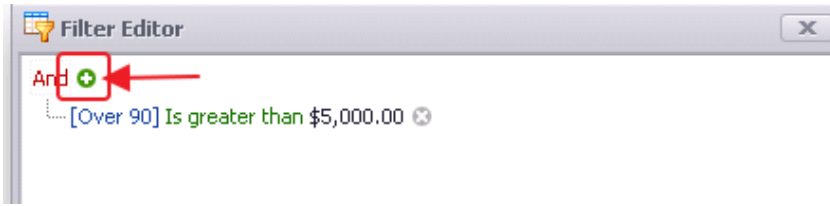
Enter value to filter by.



When finished, click **Apply** to view results from the filter without closing out the Filter Editor. Or, click **OK** to view results and close the Filter Editor.



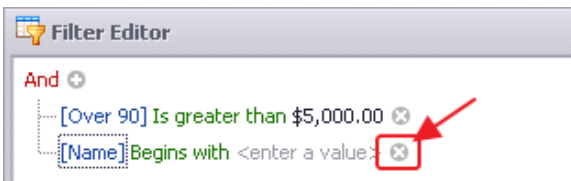
To add another line to the filter, click the green + button.



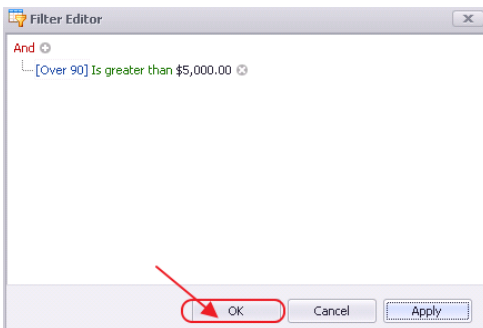
Repeat steps for defining new filter line.



To delete a filter line, click the X at the end of the line.



Click **OK** to view results.



In this example, Audubon International is the only Vendor with a balance over 90 days exceeding \$5,000.00.

Name	Over 90	ID	Account Number
Audubon International	\$10,000.00	19	AUDU50

*Additional Example:*

From the Manage Members Grid, let's assume the Board wants a list of Active Members who are ages 50 to 75. Note results are returned.

The list can now be easily exported to Excel for further manipulation.

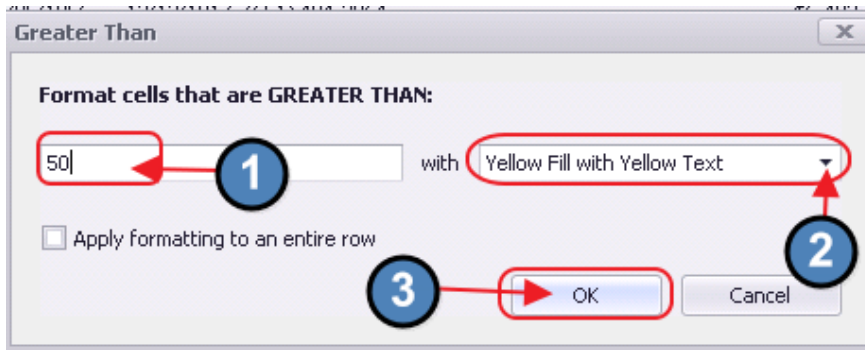
When finished, remember to clear filters to see all data.

## Conditional Formatting

Conditional formatting is a tool that allows you to apply formats to a cell or range of cells, and have that formatting change depending on the value of the cell or the value of a formula. This allows for easy interpretation of data within the grid. To access, right-click on the Column Header, and choose **Conditional Formatting**.



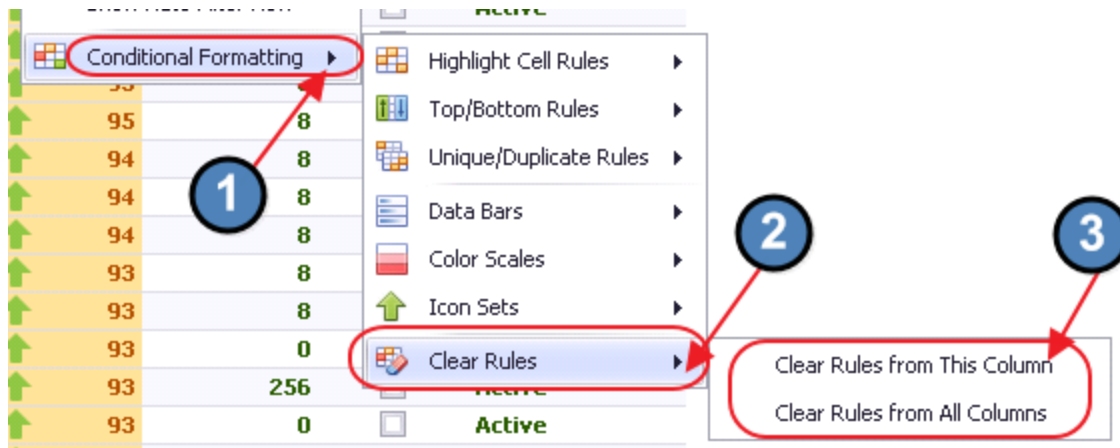
For instance, within the Membership Grid, to highlight all Members over the age of 50 in a specific color, right-click on the Age column. Select **Conditional Formatting, Highlight Cell Rules**, choose **Greater Than**, and then define rules.



Note that Members over 50 are highlighted in Yellow, and Members 50 and under are not.

Member Number	Age	Last Name	First Name	Member Type
807	51	Neumann	Gaston	Social
779	51	Knight	Leigh	Social
X5013	51	Beaty	Donovan	Resigned Archive
663	51	Oliva	Lorenzo	Social
612	51	Milner	Demetrius	Social
284	51	Souza	Shon	Corporate Golf Ju
278	51	Mccloud	Marcel	Corporate Golf Ju
262	51	Bellamy	Tad	Corporate Golf Ju
221	51	Weathers	Garland	Social (LOA)
182	51	Hamrick	Chong	Social (LOA)
175	51	Snow	Jon	Corporate Golf Ju
117	51	Diggs	Jospeh	Corporate Golf Ju
66	51	Enriquez	Truman	Social (LOA)
31	51	Earl	Bertram	Social (LOA)
17	51	Hightower	Issac	Deferred Golf
9	51	Velazquez	Shon	Corporate Golf Ju
X5059	51	Crocker	Rosendo	Resigned Archive
401A	50	Blunt	Onie	Sp-Deferred Golf
290A	50	Brice	Jacki	Sp-Deferred Golf

To clear conditional formatting added, click **Conditional Formatting, Clear Rule, Clear Rules from This Column** or form **All Columns** depending on need.



## Best Practices

Utilize Filters, Sorting, and Searches to help identify the specific data you would like to view.

Easily export views/data to Excel to further manipulate/analyze.

Remember to clear filters to view all data.

## Common Questions and Concerns

Can others view custom grid layouts I create?

Yes, once created, grid layouts are automatically available for other Users.

What is the best way to view a subset of data based on certain parameters?

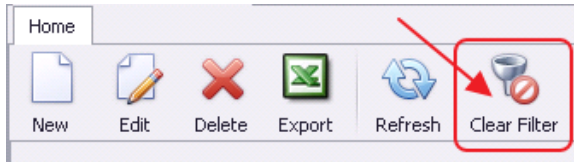
Use filters and/or advanced filters to define what range of data you would like to see, and exclude the records that do not apply.

Can I use grids to make the same change to Multiple records at a time?

Yes, utilize the **Multi Edit** feature to adjust multiple records at once. To access, right-click on the grid, and select **Multi Edit** from the menu.

## I can't see all of my data any more - how do I get it back?

Click the **Clear Filter** icon to ensure all filters have been removed, and all data is visible.



## Is it possible to see deleted records that are no longer in the default grid?

Yes, click the **Active** icon to show All records (including deleted records).

