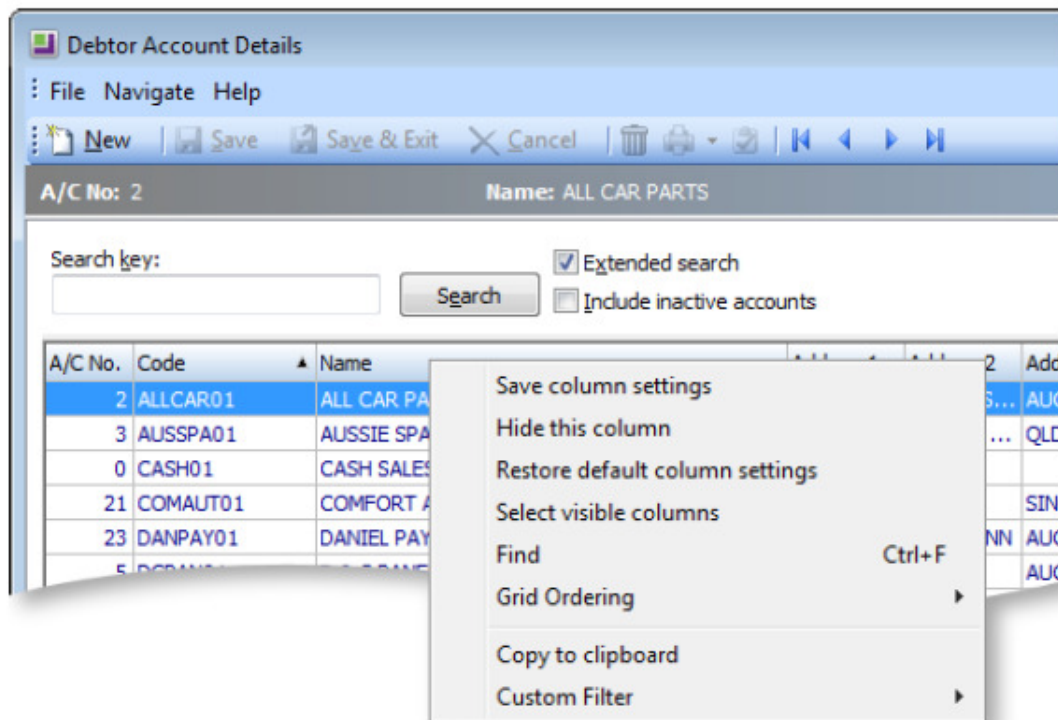


How to use and manipulate Exogrids

Overview

Exogrids are used throughout EXO Business to display, search and sort data. Exogrids are active on most screens where you are viewing current transactional information (debtor accounts, stock items, etc), however they are not active on the transaction entry screens (ie. New sales order).



Step 1 – Using Exogrids

Notes:

- If you make changes to an Exogrid that you want to retain, choose Save Column Settings.
- Clicking on a column name will sort the grid by that column (in ascending order). Clicking on the column a second time will reverse sort (descending order).
- Holding down the SHIFT key while clicking on a second column allows multiple sorts (e.g. sort by Primary Group, then by Name)
- Custom filters and ordering of columns are unique to your workstation and will not appear when working on a different workstation.
- Most screens use Exogrids, however transaction entry screens do not use Exogrids and therefore cannot be manipulated. ie new sales order, purchase order or invoice.
- Grid settings, e.g. column widths and ordering, are specific to each computer. However, they can be saved to the EXO Business database, then restored or replicated on other computers.

The information contained in this document is intended to be a guide for using your software. It is not accounting, bookkeeping or payroll advice. You should seek advice or clarification from your professional advisor in respect of these matters.

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Action	Description
Sort the Grid	Click on a column header name to sort by that column (in ascending order). You should see a small black triangle indicating the column that you are sorting on. (Code in the example above). Click on the column a second time to reverse the sort.
Restructure the Grid	Dragging and dropping a column name header will re-order the grid (e.g. you can move Name to be the first column in the grid).
Open an Item	Double click the line item
Display Line options	Right click on the grid body to display options related to the line selected. (e.g. reverse a transaction, print a document).
Display Grid options	Right-click on the blue header line of the grid (subject to option support) <ul style="list-style-type: none">• Save column settings – retains the current settings for this grid on this workstation.• Hide this column – a quick method for hiding the column that you have selected.• Restore default column settings – resets all changes back to the ‘factory default’.• Select visible columns – determines the columns to display in the grid. Some optional columns are not enabled by default, as they may not suit all users.• Find – prompts for search text, and searches the grid for a matching entry.• Grid ordering – provides two options, to ‘Lock Grid Ordering’ or to ‘Revert to Natural Order’. This prevents automatic reordering when keying-in transactions.• Copy to clipboard – copies the contents of the visible columns to the Windows clipboard, to be pasted into a spreadsheet or similar application (using the Edit > Paste menu in most applications).• Custom filter – advanced option to apply custom SQL statements to the grid. See your implementing partner if you want this functionality activated.