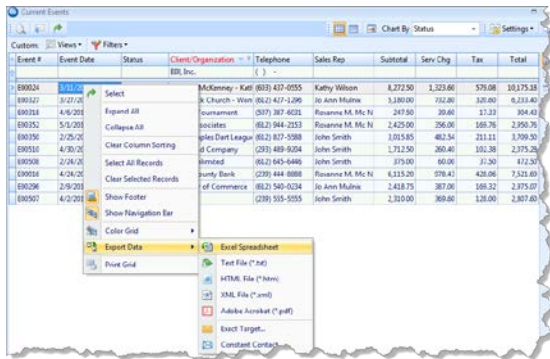



## Exporting Grid Data

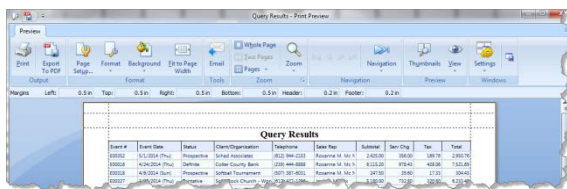
1. Click your right mouse button anywhere on the grid.
2. Select **Export Data**.
3. Choose a format for your export.
4. Enter a name for the exported file.
5. Click **Save**.



See [Exporting Grid Data](#).

## Printing Grids

1. From a detail grid, click the **Print Grid** button , located on the right-hand side of the grid.
2. From the Print Preview screen which appears, 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 [Printing 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

[Queries and Detail Grids Training Guide](#)  
[Saving and Loading Custom Grid Views](#)  
[Color Coding Detail Grids](#)  
[Scaling Text Size on Grid Prints](#)

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a product of  
Horizon Business Services, Inc.  
Naples, FL 34102  
T: 239.261.6617  
F: 239.261.0067  
[www.caterease.com](http://www.caterease.com)  
[help@caterease.com](mailto:help@caterease.com)

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# Quick Reference Guide:

## Queries and Detail Grids



800.863.1616  
[www.caterease.com](http://www.caterease.com)

## Running an Events Query

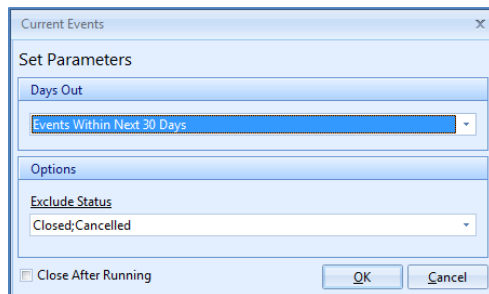
1. Click the **Events Query** button from the **Queries** sidebar.
2. Click the **Click here to add a new condition** button.
3. Click on the words **Event #** in the condition and choose any condition from the drop-down list.
4. Click the word **equals** next to your criterion and choose any option.
5. Click the final word in the condition and choose a final value for the condition to be compared to.
6. Add as many conditions as desired, repeating steps 2-5.
7. Click the **Perform Query** button .
8. If you would like to view sub-event details, click the **Settings** button, located on the upper right-hand side of the window, and choose **View Event Details**.
9. Click the plus sign to the left of any record in the results grid to drill down to a second grid, which lists sub-event details.



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**.



See [Tracking Current Events](#).

## Customizing Grid Columns

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



See [Customizing Grid Columns](#).

## Sorting Grid Data

1. Click the heading of a column in a grid to sort by that detail.
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.

See [Sorting Grid Data](#).

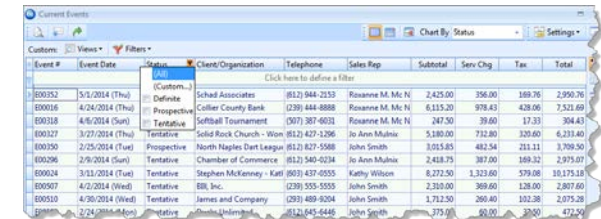
## Grouping Grid Data

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 plus sign 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**.

See [Grouping Grid Data](#).



## Filtering Grid Data (Not Available in Express)

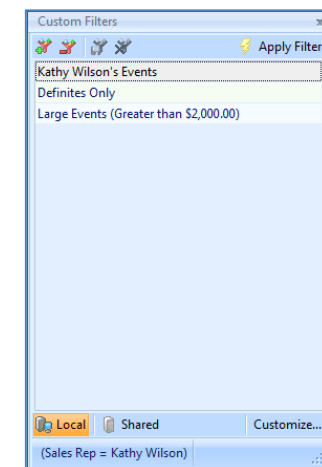
1. Float your mouse cursor over any column heading in a grid (without clicking).
2. Click the down arrow at the right of the column heading.
3. Click the checkbox next to any option in the drop-down list to filter by that detail



See [Filtering Grid Data](#).

## 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 .



See [Saving Custom Filters](#).