

Customizing Views

Andrew:

I'm trying to gather information on some of our Customers and Sales Orders... Specifically ones that have been delivered, but have a status of Credit Control.

Robert:

Why don't I give you a rundown on some of our viewer functions like Group by, that will make the process easier.

Pick a topic and we'll walk you through it!

Topics

- Configuring Columns
- Column Chooser
- Setting a Group By
- Restoring Views

Configuring Columns

You can maximize the display of information that is relevant to you when you sort, resize, and relocate columns in a View.

You can sort records in ascending or descending order.

Simply select the column heading you want to sort.

The system sorts the records in ascending order.

When you sort a column in ascending order, the system displays an up-arrow icon above the column header name.

Selecting the same column heading again, sorts them into descending order and changes the icon to a down-arrow.

Choosing the column header a third time returns the column to its original order.

You can also resize the columns in the results grid.

Move your cursor over the line that separates two columns for the column you want to change until a line with two arrows on both ends appears.

Drag the line to the left to make the column narrower.

Column Chooser

You can add or remove columns from Views to help make your work effective.

The View tab appears whenever the system displays information in a grid like you see here with this list of Products.

Open it and then select Column Chooser.

A pop-up window opens showing the names of fields not currently included in the View.

You can add any of these to display in the grid.

For example, to add the Manufacturer Code, select it and drag it to where you want it to appear.

This moves the column to the grid and removes it from the Column Chooser window.

You can also remove columns from a View.

Select the column heading and then drag and drop it into the Column Chooser box.

Close the Column Chooser window by selecting the X.

Setting a Group By

When you're working with lots of data, it's helpful to organize the information by grouping them according to specific column headings.

In this example, we have a list of sales documents.

To organize them by type, select the Sale Type column header and drag it to the field above the column names.

The system displays the column heading in the Group by field, reorganizes the sales documents by type, and shows you how many records are in each document type.

You can expand each group by selecting the drill-down icon beside each sale type.

When you expand a group, the system also shows you the totals for applicable columns.

When you're finished with this document type, you can collapse the list by selecting the up icon.

You can organize the records further by creating multiple levels.

For example, say you want to organize the records first by sale type and then by status.

To do this, select the Status column header and drag it to the Group by field.

The system reorganizes your records by sale type and then by status.

Now when you drill down to the sale type, you see a group of Statuses.

Drilling down further shows you the information for the status you select, again with totals for the appropriate columns.

You can continue to organize the records by adding more column headers to the Group by field.

When you organize your records by groups, the system automatically displays them in ascending order as indicated by the up-arrow icon above the column header name in the Group by field.

You can toggle between ascending and descending order by selecting the arrow in the Group by section that you want to organize.

You can remove a column from the Group by field by selecting the X in the column header box.

This only removes the selected column from the Group by field. Any other column headers you moved to the Group by field remain.

In this example, removing the Sale Type column reorganizes the records by Status

Most Views allow you to control the use of the Group by function from within Options.

The system enables the Group by area when you check this box.

Disabling the checkbox removes the Group by function from the view.

Restoring Views

You can restore any View to its original settings.

In the previous videos, we changed the size of two columns, relocated one from a different part of the grid, used Column Chooser to add a new column, and moved others in.

To restore the display to its original settings, open the View tab and select Reset View.

The system restores the results pane to its original settings including, returning columns to their original size, removing columns you added from Column Chooser, and returning columns you moved to their original location.

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