Using Grid Features

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The Grid Filters was designed to help users view and/or export data displayed on one of the Grid tabs to Excel. Filters may be entered/selected for transactions listed on any of the tabs within the Grid area. You may be looking for certain types of transactions or transactions within a particular date range; you are able to accomplish this by using a filter on one or multiple columns displayed in the Grid area.

Each column listed within the grid area has particular filtering capabilities.

- - If this symbol is displayed in the column filter row, you may select from only one value displayed in this column. For example, we are in the Branch column and we click on the drop-down arrow to the right of this filter, all branch codes for the transactions listed on the tab will be displayed for selection. You are able to select one particular branch – only transactions for the selected branch will be displayed.
- - If this symbol is displayed in the column filter row, you have multiple options for filtering the list of transactions. For example, we are on the Approved tab and on the Submitted [date] column and we only want to see transactions that were submitted on a particular date. We would select the filter option of Equals and then type in the date for which we are looking for a list of transactions.

In the example below, we are looking for all transactions on the Approved tab where the Payment Method = Visa and the Submitted date is greater than 01/31/2021. Once the filtered transactions are displayed, you may export the data to Excel by clicking on the Tools tab and selecting the Export to Excel option.