

Compeat Help

Home > Getting Started > View Your Data

View Your Data

Contents

[Search](#)

[Sort](#)

[Show/Hide](#)

[Filter](#)

[Columns](#)

[Export to Excel](#)

[Group by Column](#)

Tables, grids, and listing throughout Compeat use some of the same sorting, grouping, and filter options which allow you to interact and view your data in various ways. We provide examples below.

Please note that while we list all options here, some options may only be available for certain tables, grids, or listings.

Search

Your search field lives above the table, grid, or listing. You can search for transactions, entries, or line items by entering relevant details. Results automatically filter.

Compeat uses a *contains* criteria in searches, meaning the system looks at the whole entry for any match to your entered detail.

Search			
tomato			
Drag a column header and drop it here to group by that column			
Item Desc.	Item #	Defined in #101	Level 1
PREP Tomatoes, Chopped	700484	Defined	FOOD
PREP Tomato Sliced	12345730	Defined	FOOD
PREP Tomato Puree	12345731	Defined	FOOD

- » If searching *Tomato* in Prep Items, Compeat might return items such as *Tomato Sliced*, *Tomato Puree*, *Tomato Sauce*, and *Tomato Chopped*.
- » If searching *152* in General Ledger Inquiry, Compeat might return GL Account *1520*, reference to payment batch *BM-101-001520*, and a GL entry in the amount of *\$15.20*.

Sort

Each column allows you to sort displayed items either numerically or alphanumerically. Select a column header and a small arrow indicates the sort order (ascending vs. descending, A-Z vs. Z-A).

In select Inventory tables, you can apply a sort to more than one column at a time. Select a column header a third time to restore the default sort order.

Entity #	Batch Code	Journal Ctrl # ↑	GL Account #	GL Account Descr...	Trx Date
101	BM-101-001422	BM-101-001422	1020	Cash in Register	5/23/2019

Show/Hide

In select tables, grids, and listings, you have the option to show or hide transactions, entries, or items that meet a specific criteria. Simply enable the *Show/Hide* toggle or select the *Show/Hide* checkbox above the table, grid, or listing.

Item List (1380/1380 records) Show All		
Search		
Drag a column header and drop it here to group by that column		
Item Desc.	Item #	Defined in #101
BAR SUPPLIES Cane Syrup	700844	undefined
BAR SUPPLIES Celery Salt	700060	Defined
BAR SUPPLIES Chinese Peanuts	63	undefined
BAR SUPPLIES Citric Acid	701066	undefined

- » In the Inventory Item listing, enable the *Show All* toggle to view all items—even those not defined for your current entity.
- » In Settings, when viewing vendor records, you can choose to hide inactive vendors from the listing by selecting the *Hide Inactive* checkbox.

Filter

The Inventory, Prep, and Menu Item listings allow you to enable filters for every displayed column. This allows you to customize which items appear by defining multiple filters. Simply select the *Filter* button to the right of the search field.

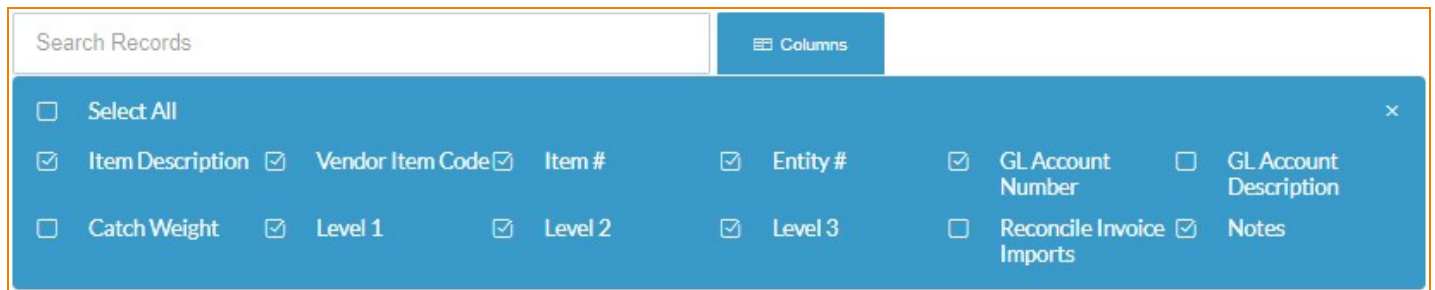
Item Desc.	Item #	Defined in #101	Level 1	Inventory Unit
<input type="text"/>	<input type="text"/>	(All)	Select item	<input type="text"/>
LIQUOR Bacardi 151	700778	Defined	LIQUOR	Liter
LIQUOR Bailey's Irish Cream	700105	Defined	LIQUOR	Liter
LIQUOR Baska Snaps	700306	Defined	LIQUOR	Liter
LIQUOR Beefeaters	212	Defined	LIQUOR	Liter

What does True/Is False mean?

In the case of *All* drop-downs, *Is True* displays items selected or defined whereas *Is False* displays items not selected or defined.

Columns

You can customize which columns you see in your table or grid. Simply select *Columns* to the right of the search field, then select your desired columns from the fly-down. Column preferences are user-specific.



Export to Excel

You can export a copy of your table details by selecting *Export to Excel*. If you have applied a filter, sort, and/or search criteria to the table, then those filtered details export.

Group by Column

You can group table details by a specific column type. Simply drag the column header to the space above the table. You can add multiple columns, if desired.

Drag a column header and drop it here to group by that column

	Entity #	Voucher #	Batch #	Doc Type	Doc Amount	Doc Date	Vendor Name
<input type="checkbox"/>	101	C-101-0001622	BM-101-001432	PMT	-\$75.00	6/10/2019	PFG - Caro
<input type="checkbox"/>	101	C-101-0001622	BM-101-001432	MAN CHK	\$75.00	6/10/2019	PFG - Caro

Once you have applied a grouping, you can expand or collapse all groups using the buttons provided, or by selecting the individual group drop-down. To clear a grouping, select the **X** beside the column name.

↑ Vendor Name ×							
	Entity #	Voucher #	Batch #	Doc Type	Doc Amount	Doc Date	Vendor Name
▶	Vendor Name: 1000BULBS						
▼	Vendor Name: 7-ELEVEN						
<input type="checkbox"/>	101	V-101-0013765	BV-101-005940	INV	\$999.99	5/22/2019	7-ELEVEN
▼	Vendor Name: A Look From Above, LLC						
<input type="checkbox"/>	106	C-106-0000425	BM-106-000396	ZERO CHK	\$0.00	5/29/2019	A Look From Abov...
▼	Vendor Name: PFG - Caro						
<input type="checkbox"/>	101	C-101-0001622	BM-101-001432	PMT	-\$75.00	6/10/2019	PFG - Caro
<input type="checkbox"/>	101	C-101-0001622	BM-101-001432	MAN CHK	\$75.00	6/10/2019	PFG - Caro
<input type="checkbox"/>	101	C-101-0001622	BM-101-001432	MAN CHK	\$75.00	6/10/2019	PFG - Caro

Updated on October 10, 2019

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