# How to use Grids

Simplifying and connecting your digital services

## How to use Grids

Grids are a great way to help you organise and view your organisations activities in Transactive - Global.

The functionality of a grid view is replicated in the system across all products & services, but today we will look at how grids can help you when viewing your payment activities.

Here we can see a grid - simply being the table list of all details related to our current payments.

If this default order does not work for you, then you are able to customise it.

Some grids will have many columns which cannot be viewed in the one screen.

To customise the column order, we can click the column we want to move and then drag and drop to the new location. Here we can also resize the columns, if need be.

You can also hide columns by right clicking on any column heading and then untick the relevant checkbox. Re-selecting will bring the column back.

Lastly, you can order the column either in ascending or descending order by simply clicking on the heading.

When selecting a record from the grid, you can right-click and open up a number of actions available to the specific item.

For example, you can choose to run a report, or approve/reject a payment if the option allows.

Additionally, we can also use some functions of the Control Bar.

In the same way as when you right-click, you can also perform most of these actions from the Control Bar by selecting a record/s and using the icons.

In the View icon, this shows a drop down menu of a number of pre-determined filters which you may find useful.

Also, clicking on the Refresh icon will reload the most up-to-date information at any point in time.

In the Group drop down menu, we have a number predefined options that we can select to group our payments.

As an example, let's group by Status.

These groupings can then be minimised to enable a more concise view by selecting Collapse All from the drop down, which then can be individually expanded.

To remove the groups, you can select the icon, but then chose 'Off' from the drop down.

To drill down and view the results even more concisely, we can also use the 'Filter' function in the Control Bar.

For instance, if we want to view only domestic payments, we can type 'Domestic' into the free text box under column Payment Type.

It's also possible to have multiple filters applied at once as shown here.

You are also able to run a report for the selected records we have filtered.

You can either right-click on the record as previously shown, or use the Select All checkbox then under 'Reports' in the control bar, you can choose to run a report.

This opens a pop-up window we can select our options which will then process the report.  Depending on the report run, it will either be available in the Report Downloads Centre or at the bottom of your browser window.

To remove the filter, you can simply click the 'Filter' icon in the control bar.

You can also choose to Export all records into Excel at any time by clicking on the 'Export' icon from the control bar.

It's important to note that any customised changes you make to the grid columns are automatically saved for the next time.

However, to save Group filters, you need to go to settings in the control bar and then save. This will be saved for the next time you log in.

Finally, if you'd like to reset your grid back to default, you can achieve this by right-clicking on any column header, then scroll to the bottom of the list and click on 'Reset Grid Columns'.

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