

How to Group the Records on Search Grid

The grid can be grouped depending on the columns visible on the panel. Here is how to do this.



Changes on the sorting or setting of the grid area can be saved using the View button

1. Open the [Search](#) screen or any screen with grid area.
2. Left or right click the column header of the column you want to use as the grouping. The **Grid Column Options** will be displayed.
3. Click the **Group By** button to group the transactions without totals.

The screenshot shows the 'General Journals' search grid. The 'Journal Type' column header is right-clicked, and the context menu is open. The 'Group By' option is highlighted. The grid displays 103,423 records. The columns are: Record No, Description, Journal Type, Date Posted, Reverse Date, Entered By, Entered Date, Currency, Total Debit, and Total Credit. The records are grouped by Journal Type, showing sections for Reversal Journal, Recurring Journal, and Imported Journal.

Record No	Description	Journal Type	Date Posted	Reverse Date	Entered By	Entered Date	Currency	Total Debit	Total Credit
GJ-103440	AP Balancing	General Journal	11		IRELY ADMIN	09/27/2018	USD	5,972,000.00	5,972,000.00
GJ-103439	Duplicate of GJ...	General Journal	18		Jennifer E. Beec...	09/21/2018	USD	2,500.00	2,500.00
GJ-103438	Duplicate of GJ...	General Journal	18		Jennifer E. Beec...	09/17/2018	USD	22.00	22.00
GJ-103437	Duplicate of GJ...	General Journal	18		IRELY ADMIN	09/14/2018	USD	2,500.00	2,500.00
GJ-103434	Duplicate of GJ...	General Journal	18	08/01/2018	Jennifer E. Beec...	07/18/2018	USD	25,000.00	25,000.00
GJ-103433	Duplicate of GJ...	General Journal	18		Jennifer E. Beec...	06/14/2018	USD	14.00	14.00
GJ-103432	test	General Journal	11		Jennifer E. Beec...	06/14/2018	USD	14.00	14.00
GJ-103431	Balancing	General Journal	02/28/2011		IRELY ADMIN	06/14/2018	USD	5,732,920.67	5,732,920.67

The grid is grouped by Journal Type, showing sections for Reversal Journal, Recurring Journal, and Imported Journal. The 'Show Totals' checkbox is at the bottom left, and the 'Refresh' button is at the bottom right.

4. Click the **Group By with Totals** button to group the transactions and show the total for each group.

The screenshot shows the 'General Journals' window with a table of transactions. The table is grouped by 'Journal Type' into three sections: Reversal Journal, Recurring Journal, and Imported Journal. Each section has a summary row with total debit and credit amounts. The 'Reversal Journal' section has a total debit of 7,549,708.25 and a total credit of 7,549,708.25. The 'Recurring Journal' section has a total debit of 2,510.00 and a total credit of 2,510.00. The 'Imported Journal' section has a total debit of 27,352,675.00 and a total credit of 27,352,675.00. The table columns include Record No, Description, Journal Type, Date Posted, Reverse Date, Entered By, Entered Date, Currency, Total Debit, and Total Credit.

Record No	Description	Journal Type	Date Posted	Reverse Date	Entered By	Entered Date	Currency	Total Debit	Total Credit
Journal Type: Reversal Journal								7,549,708.25	7,549,708.25
REV-2	Reversing trans...	Reversal Journal	03/04/2016		Pete Schmidt	02/26/2016	CAD	805.83	805.83
REV-1	Reversing trans...	Reversal Journal	03/01/2016		Matt Wielinski	02/24/2016	CAD	1,548.64	1,548.64
REV-5	Reversing trans...	Reversal Journal	09/01/2017		Dean Covey	08/03/2017	USD	7,501,000.00	7,501,000.00
REV-6	Reversing trans...	Reversal Journal	03/01/2017		Michelle Miller	09/10/2017	USD	1,010.00	1,010.00
REV-8	Reversing trans...	Reversal Journal	10/01/2017		Michelle Miller	09/17/2017	USD	100.00	100.00
REV-9	Reversing trans...	Reversal Journal	04/01/2017		Michelle Miller	09/18/2017	USD	100.00	100.00
REV-10	Reversing trans...	Reversal Journal	10/03/2017		George M Olney	01/22/2016	USD	1.00	1.00
REV-11	Reversing trans...	Reversal Journal	10/03/2017		George M Olney	05/19/2017	USD	10.00	10.00
REV-12	Reversing trans...	Reversal Journal	10/03/2017		George M Olney	05/19/2017	USD	8.00	8.00
REV-13	Reversing trans...	Reversal Journal	10/01/2017		Mei Meyers	10/03/2017	USD	20,124.78	20,124.78
REV-14	Reversing trans...	Reversal Journal	08/01/2018		Jennifer E. Beec...	07/18/2018	USD	25,000.00	25,000.00
Journal Type: Recurring Journal								2,510.00	2,510.00
GJ-103429	Test Recurring...	Recurring Jour...	07/07/2018		Dean Covey	06/07/2018	USD	2,500.00	2,500.00
GJ-103385	Recurring Jour...	Recurring Jour...	02/28/2090		George M Olney	10/19/2017	USD	10.00	10.00
Journal Type: Imported Journal								27,352,675.00	27,352,675.00
GJ-103386	Duplicate of GJ...	Imported Journal	03/03/2016		George M Olney	10/20/2017	USD	8.00	8.00
GJ-103388	Duplicate of GJ...	Imported Journal	03/03/2016		Joe Approver	11/15/2017	USD	8.00	8.00
GJ-103400	First	Imported Journal	03/03/2016		George M Olney	12/26/2017	USD	8.00	8.00

- i** To un-group the records, click the **Clear Group By** button on the **Grid Column Options**.

