TOPS iQ®

CUSTOM GRID LAYOUTS MANUAL

By

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This guide is provided by TOPS Software, LLC as a reference and help tool for using the TOPS iQ Grid Layouts. Illustrations used in this guide may display windows with modules, features, and or functions that may not be part of the TOPS iQ™ version you are currently running or available as add-ons or as plug-ins to an interface to third party products. Additionally, the most recent updates may not be reflected in this guide.

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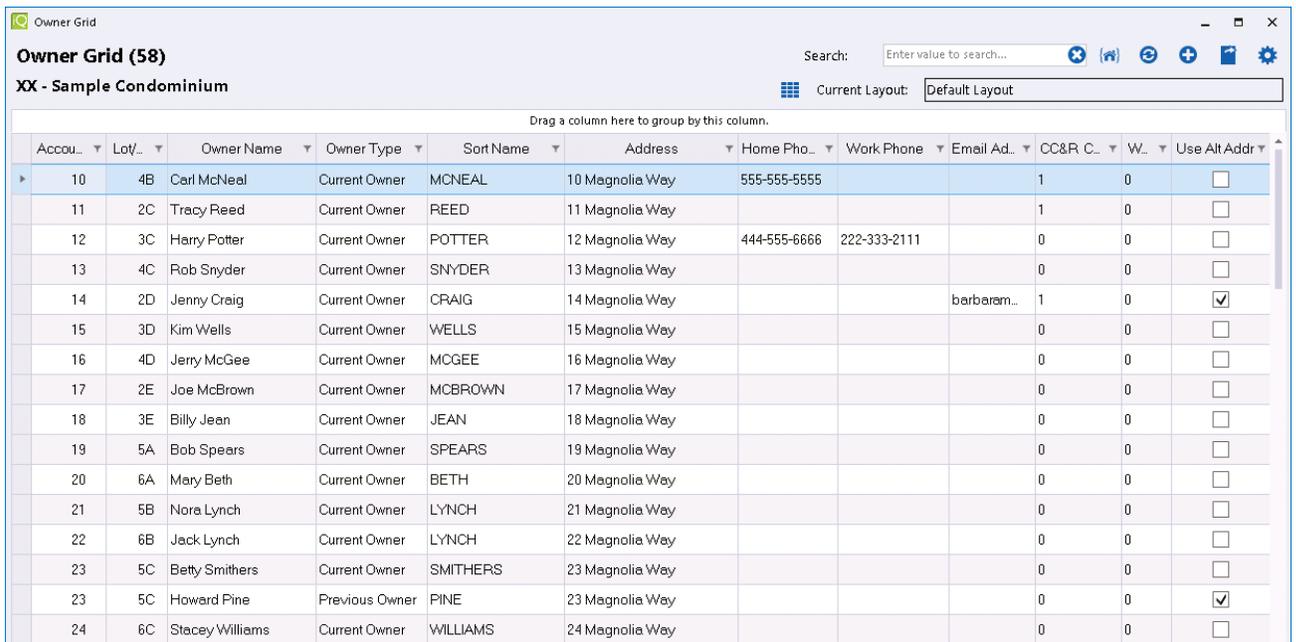
It is also assumed that the user of this guide is familiar with basic windows functionality and navigation tools. Refer questions regarding the use of Windows Explorer to your system administrator.

Custom Grid Layouts

Grid layouts can be customized to display only those columns that you need to view. Every grid can have as many layouts as you wish to design for them. They will be individualized per module so you will always know which module you are in when viewing. As long as you have permission to Customize Grids on your account you can have multiple layouts that can have as much detail or as little information as per your preference.

The Default Layout is the layout that will display every time you open that module's grid. Since this will be your default grid and most used grid, design it to be exactly what you want displayed when you first open your grid.

This is an example of the Owner Grid for the Sample Community. In the top right corner, you will see that the Current Layout is set to Default Layout.

You can make any changes to this layout and save it to create your default layout. You will be able to add columns, hide columns, change column widths, and sort in ascending or descending order. Filters can also be used to remove certain records that you may not want displayed.

To modify Layouts by using column filters you would simply click on the drop down next to the column header. This is where you can deselect any filter that you do not want to view in the grid layout. An example of this is when you may not want to view Previous Owners in the Owner Grid. You would uncheck Previous Owners, select OK, then save the layout.

In the example below, Sort Name, Previous Owners, Home Phone Numbers, and Work Numbers were removed from the layout. Also, the width of the remaining columns was modified for better fit. You would need to uncheck Previous Owners from the drop down filter list in the Owner Type column, hide the other columns, rearrange the width and Save the new Default Layout.

These are the options from which you will choose to create a New Layout, Save Layout, Delete Layout or Reset to Original Layout:

After saving the above layout the Default Layout will now look like this:

Layout Options

The Custom Grid Layout options are:
- Default Layout – opens the Default Layout of any grid.
- New Layout – creates a new layout.
- Save Layout – save the layout.
- Delete Layout – deletes the layout.
- Reset to Original Layout – resets any layout to the original TOPS iQ layout design.

When you select New Layout, a "Save Grid View" message will display asking you to enter the new grid layout name. Simply type in the name of the new layout, click on OK and now you can start to design your new layout.

After making changes to the new layout, select Save Layout from the Custom Grid Layout dropdown and you will be able to access this new layout from any community. Grid layouts are stored on a user basis, which means that each user

has their own layouts for every module. What's great about this is you can create as many layouts as you need for each grid. If you need a layout that is specific to a community you may want to add the Community Name to the layout description as in the description above.

After a layout has been designed and saved, you can always go back and make changes to it. Once again, make sure to Save the layout in order for the changes to be added to your design.

Import and Export Grid Layouts

In addition to creating Excel, HTML and PDF files and reports from grids, you will be able to share customized Grid Layouts with your organization by using Import Layout and Export Layout options from the Export button.

After creating a custom layout, you can Import the layout which will be saved in the Default "Cloud Docs" shared folder. Everyone in the organization will have access to the Import grid and have the ability to Export that grid into their stored layouts. When creating new layouts that will be shared, make sure that the layout names are descriptive enough so everyone will know what the layout relates to. For example, a custom Work Order layout is created to display only Active records. You will want to include Work Order in the name of the layout so you know that it pertains to that grid (i.e., "Work Order Active Records Only"). Customized grids will only work for the module in which they were created. If you create a layout for CCR's, that grid layout will not work for the Owner Balances grid. So, the more detailed you are in naming layouts the easier it will be for others to import the layout and will save time in the long run.