

Quick Search Bar
Enter search text to find an entry (i.e. Contact) & click relevant search result to view details. Click *View All Results* to view full text search throughout OnePlace. ***TIP*** Type "Contact:" and then your search text to narrow your search to just Contact entries.

Icon Drawer
Access additional widget controls such as "Export" and "Full Screen".

Full Screen
Click to enter the widget into Full Screen mode.

Share Link
Copies a link a link to your clipboard to share the widget.

Notifications Icon
Access recent notifications.

Profile Icon
Access Settings, Download Add-Ins.

Lists Menu
Access to view all entries for several Lists (i.e. all plans), as well as bulk edit capabilities.

Dashboard Pane
Navigate to dashboard reports along the left navigation pane.

Collapse Icon
Collapse the dashboard pane to expand dashboard content.

Detail Hyperlinks & Edit Icon
Double click the hyperlink to navigate to detail on the entry. Click the dropdown arrow to make edits to an entry.

Sort & Group Columns
Move your cursor over a column name to access the icon with sorting and grouping options.

Column Width
Adjust column width by selecting the dotted line between columns and dragging.

Import
Select an Excel file containing a table of data to add in bulk or edit existing entries in bulk from.

Notification
Can be used to set notifications such as changes or additions to the data in the grid.

Columns Icon
Reorder columns by dragging and dropping the column name. Click the eye icon to hide a column.

Interact with Charts
Click a Series to see underlying entries. Deselect a Series from the legend to remove it from the chart.

Export
Export the widget as an image, to Excel as a raw data set, or to Excel with the OnePlace Excel formulas that link to the chart's data set.

Add Menu
Choose an entry type from the Add menu to launch an Entry Form.

Filter Icon
Apply filters to the data in any data grid.

Edit Pencil Icon
Click the pencil to launch the Edit Grid and make updates in bulk.

Icon Drawer
FULL SCREEN, SHARE LINK, EXPORT, IMPORT, EXPORT, NOTIFICATION, COLUMNS

OPPORTUNITY	COMPANY NAME	COMPANY CONTACTS	OPEN DATE	PRACTICE AREA	STATUS	SUB-SECTOR	LEAD PARTNER	PT	TEAM
1- LEAD (12)	EMEA Tax Matters	3M Health Information Systems	07/03/19	International taxation	Development	Business Development			
	Jersey City rental agreement	3M Health Information Systems	11/04/19						