Mercury Beta: User Help

Welcome to the beta program for Mercury. We're glad you're here!

Here's the help for using an app in the Mercury Beta. The sections below explain all the things you can currently do:

- Search apps
- Open an app
- Using an app
- Using tables
- Using reports
- Search a report
- Sort or group a report
- Filter a report
- Select records in a report

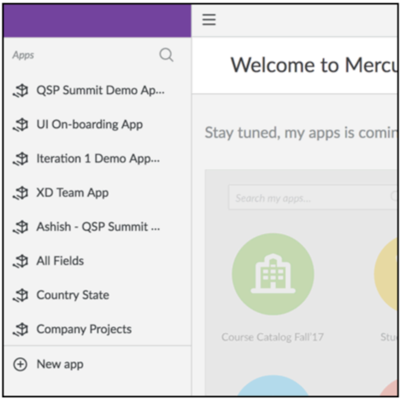
Search apps

To find an app:

1. Select Apps in the upper left. The Search apps field appears.
2. Start typing all or part of the app name. A list of results appears below the Search apps field.

Open an app

To open an app, select the app name from the list on the left.



Welcome to Mercu

Stay tuned, my apps is comin

Using an app

This section explains how to use a Mercury app.

Search tables

To find a table in your app:

1. Select Tables in the upper left. The Search tables field appears.
2. Start typing all or part of the table name. A list of results appears below the Search tables field.

Open a table

To open a table, you can:

- Select the table name from the list on the left, or
- Select the reports icon next to the table name. A list of all reports for the table appears. Select a report to open the table.

Switch to another app

To open another app:

1. Select the down arrow next to your app name. A list of your apps appears on the left.
2. Select the name of the app you want to open next.

Users in your app

To see the users in your app, select Users in the upper left. A list of all the users in the app appears.

To see more information about the app users, select the down arrow in the upper right. The name of the app manager appears, along with a count of users by role (none, viewer, participant, and administrator).

To send a user an email, find the user and select the email address. A new email is started in your default mail client.

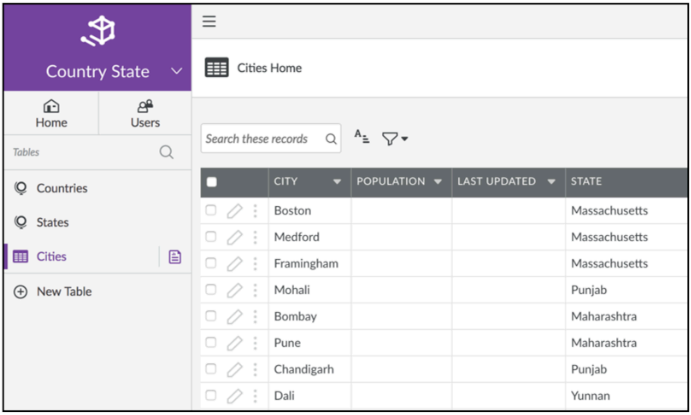
To add users to your app, see the topic Adding Users.

Using tables

This section explains how to use tables in your app.

Table home page

The home page of your table shows a report listing all records in the table.



	CITY	POPULATION	LAST UPDATED	STATE
☐	Boston			Massachusetts
☐	Medford			Massachusetts
☐	Framingham			Massachusetts
☐	Mohali			Punjab
☐	Bombay			Maharashtra
☐	Pune			Maharashtra
☐	Chandigarh			Punjab
☐	Dali			Yunnan

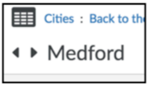
Add records

To add records to your table:

1. While in a report, select the plus icon. A new record appears.
2. Enter information in the record. You can select Save & Add Another to save the new record and then start a new record. Or, you can select Save to save the new record and return to the report.

View records

From the report, select the record to view it. Once you open one record, you can select the left and right arrows next to the record title to navigate to other records in the table.



Edit records

Mercury provides several ways you can edit information in records:

- Edit inline
- Select edit from a report
- Open a record and select edit

Edit inline

1. While viewing a report, hover over a field and an edit (pencil) icon appears. Select the edit (pencil) icon and you can edit any field in the row for the record.
2. Select the check mark to save changes to the record or select the plus sign to save changes and add a new record. To cancel changes, select the X.

Select edit from a report

1. While viewing a report, select the edit (pencil) icon in the first column. The record opens in edit mode.
2. Update the fields you need to change, and then select Save & Next to save the record and then edit the next record, or select Save to save the record and return to the report.

Open a record and select edit

1. From a report, select a record you need to update to open it in read mode.
2. Select the edit (pencil) icon in the upper right.
3. Update the fields you need to change, and then select Save & Next to save the record and then edit the next record, or select Save to save the record and return to the report.

Keyboard shortcuts

When you have a record open in edit mode, there are some keyboard shortcuts available:

Keyboard combination	Description
Windows: Ctrl+S Mac OS: Command+S	Save and close the record
Esc	Cancel editing

Delete records

Mercury provides several ways you can delete records:

1. Delete one record from a report
2. Delete multiple records from a report
3. Open a record and select delete

Delete one record from a report

While viewing a report, select the More icon in the first column, then select Delete record.

Delete multiple records from a report

While viewing a report, check one or more records in the first column, then select the Delete records icon above the report.

Open a record and select delete

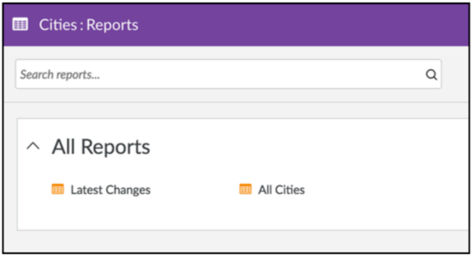
1. From a report, select a record you need to delete to open it in read mode.
2. Select the delete icon in the upper right.

Using reports

This section explains how to use reports in your app.

Viewing reports

To view reports for a table, select the reports icon next to the table name. A Search Reports field and a list of all reports for the table appears.



If you see the report you want in the list, select a report to open it.

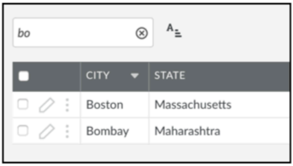
If you don't see the report you want, start typing in the Search Reports field. Once the report you want appears in the search results, select the report to open it.

Viewing a report lets you see the information stored in a table. Here are ways you can work with a report:

- Search records in the table
- Sort or group records
- Filter records
- Select one or more records and perform actions

Search a report

To search a report, start typing in the Search These Records field. The report produces search results matching your search string.



☐	CITY	STATE
☐	Boston	Massachusetts
☐	Bombay	Maharashtra

Sort or group a report

To organize the information in a report, you can sort or group the information. You can sort a report based on the information in a record field, for example, alphabetically or from low to high values. Or, you can group information in a report so that all the records sharing a common record value appear organized together, for example, all the tenants in an apartment building can be grouped by the apartment building name. You can add one or more sorting or grouping options to change the report presentation.

There are two ways to start sorting or grouping a report:

- Select the Sort & Group Icon
- Select the arrow on a report column

Sort & Group icon

The Sort & Group icon lets you choose grouping and sorting options together.

1. Select the Sort & Group icon at the top of the report. A Sort & Group dialog appears.
2. In the Group section, select the By box to choose a field by which to group. Your choice appears in the Group section. If you want to add another Group choice, click the Then By box and choose another field.
3. In the Sort section, there is probably a default sort option. You can click the arrow to change the sort order, or click the X to remove the default sort.
4. To add another sort, select the By or Then By box to choose a field on which to sort.
5. Select Apply to save your grouping and/or sorting choices to the report.

Sorting and grouping via report columns

To sort a report:

1. Choose a column in the report and select the down arrow. A menu appears with sorting and grouping choices.
2. Select the sorting option you want. For example, a column with text values has the alphabetical sorting choices Sort A to Z and Sort Z to A.

To group a report:

1. Choose a column in the report and select the down arrow. A menu appears with sorting and grouping choices.
2. Select the grouping option you want. For example, a column with text values has the alphabetical sorting choices Group A to Z and Group Z to A.

Removing sorting or grouping

To remove a sorting or grouping choice:

1. Select the Sort & Group icon at the top of the report. The Sort & Group dialog appears.
2. Select the X next to an existing group or sort choice, then select Apply. The sorting or

grouping is removed from the report.

Filter a report

You can limit the contents of a report by filtering on one or more field values.

Adding a filter

To filter a report:

1. Select the Filter icon at the top of the report. A menu appears lists the report fields for filtering.
2. Select the field on which you want to filter. The field values appear.
3. Select the field value on which you want to filter. The report updates to limit the information, showing the records matching the field on which you chose to filter. Your filter value choice also appears next to the Filter icon.

Removing a filter

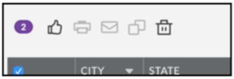
By removing a filter from a report, the information updates to show all the records again. To remove a filter from a report:

- Select the filter choice next to the Filter icon, or
- Select the Filter icon and then deselect the filter choice checked with a green check mark.

Select records in a report

To select records in a report, use the check box in the first column to select one or more records.

Once you select one or more records, different icons appear at the top of the report:



With the icons, you can perform different actions, such as:

- Edit
- Approve
- Print
- Email
- Copy
- Delete

App Building Platform

Collaboration Apps
Customizable Apps
Workflow Automation Software
Dashboard Tools
Rapid App Development
Rapid Prototyping Software
Low & No Code Development
Online Database Software

App Building Solutions

Project Management Apps
CRM & Sales Software Apps
HR & Talent Management Apps
Training Management Apps
Customer Service Apps
IT & Task Management Apps
Build Your Own App

Support & Community

Submit a Support Case
Check Support Case Status
Ask the User Community
Find a Quick Base Add-On
Access Online Help
Database
Download Quick Start Guide
Integrate Data with the API

Blogs

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