



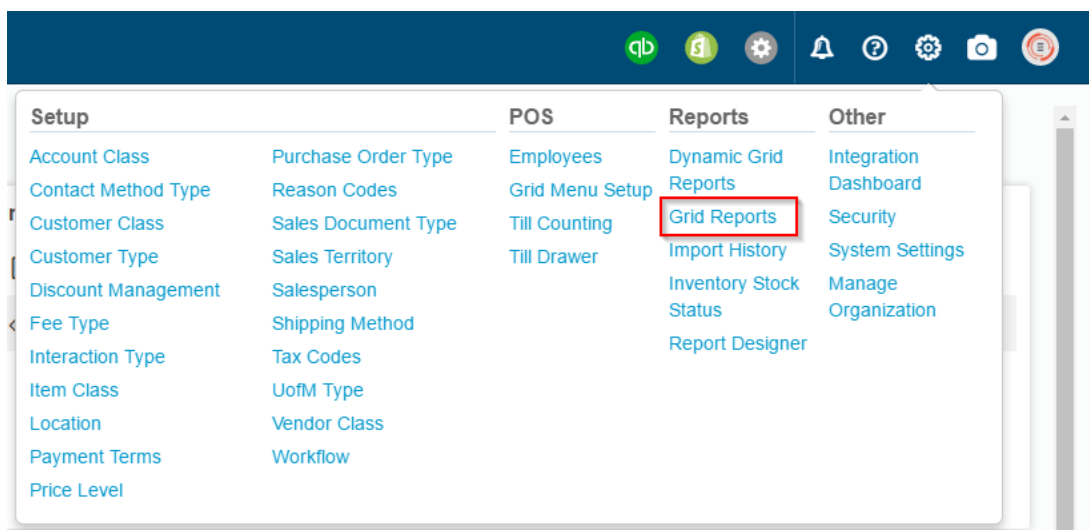
Grid Reports

Cavallo IT - 2024-12-02 - Settings

Overview

Grid Reports allows you to assemble customized reports in seconds. If it's in SalesPad, it's available to display on a Grid Report.

To get started, select **Grid Reports** from the Settings menu.



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Grid Reports

Create a Grid Report

To create a new Grid Report, click the **New Grid Report** button in the upper left-hand corner of the screen.

The image shows the top navigation bar of the SalesPad Cloud interface. On the left is the SalesPad Cloud logo. In the center is the text "SalesPad Store". On the right is a button labeled "11 Recent". Below the navigation bar is a "Navigation Search" dropdown menu. To the right of the search bar is a button labeled "New Grid Report" which is highlighted with a red rectangular border. Below the search bar is a "Dashboard" link with a clock icon.

Name your new report, select a Report Source, and choose Group by criteria in the New Report drawer that appears.

The image shows a "New Report" drawer. At the top right of the drawer is a "Feedback" button with a speech bubble icon. The title "New Report" is on the left, and a close button "x" is on the right. The form contains the following fields: "Name" (text input), "Report Source" (dropdown menu), "Group by" (dropdown menu), and "Select columns to show" (text input). Below the "Select columns to show" field is a light blue message box that says "Please select a Report Source to see available columns."

Click **Save** to add your new Grid Report to the existing Grid Reports.

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Set Advanced Filters

To further refine your Grid Report, you can set advanced filters. First select the Grid Report from the list on the left-hand side of the Grid Reports window.

The image shows a window titled "New Grid Report" at the top. Below the title is a list of reports. The first report, "Current Inventory", is highlighted with a light blue background and a red rectangular border. The second report, "Backordered Inventory", is listed below it.

Once you've selected the Grid Report you want to edit, click **Set Advanced Filters**.

Report: Current Inventory

Report Source

Inventory Stock Views

[Set Advanced Filters](#)

Last Ran:

Create your filter settings in the Set Advanced Filters drawer that appears.

[Feedback](#)

Set Advanced Filters ✕

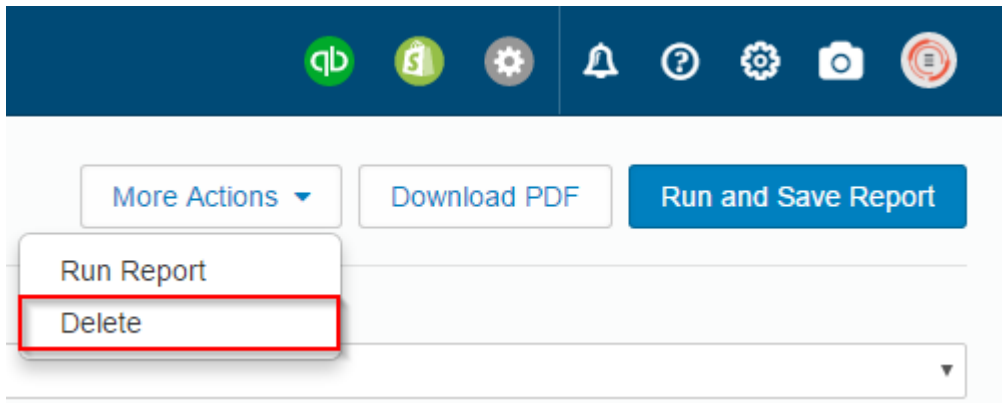
Item Class	<input type="text"/>
SKU	<input type="text"/>
UPC	<input type="text"/>
Item Number	<input type="text"/>
Item Description	<input type="text"/>
Warehouse Name	<input type="text"/>
Unit Cost	<input type="text" value="Add Filter"/>
Qty	<input type="text" value="Add Filter"/>
UoFM	<input type="text"/>
Abbreviation	<input type="text"/>
Extended Cost	<input type="text" value="Add Filter"/>

Click **Set Filters** when you're finished.

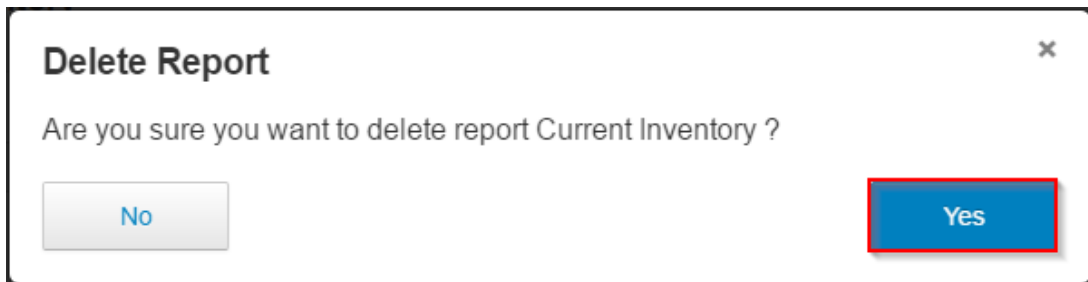
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Delete a Grid Report

To delete existing Grid Report, first select the Grid Report from the list on the left-hand side of the screen, then click **Delete** from the More Actions dropdown in the upper right-hand corner of the screen.



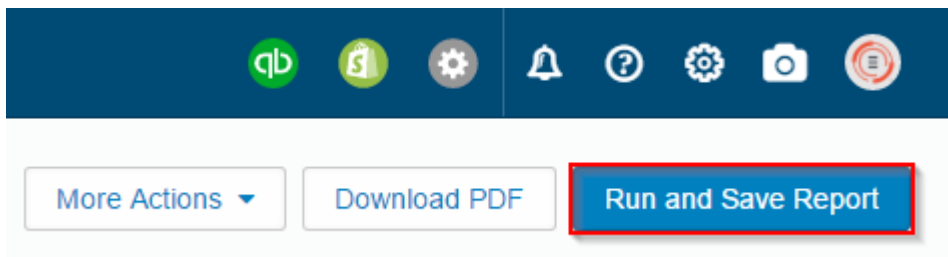
Click **Yes** in the Delete Report window that appears.



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Run a Grid Report

To run a Grid Report, click **Run and Save Report** in the upper right-hand corner of the screen.



Your Grid Report will appear in the Grid Reports window. Remember, every grid found in SalesPad Cloud is fully customizable. To review how to customize a grid, read the Auto Filter Row and Column Chooser section of [Introduction to SalesPad Cloud](#).

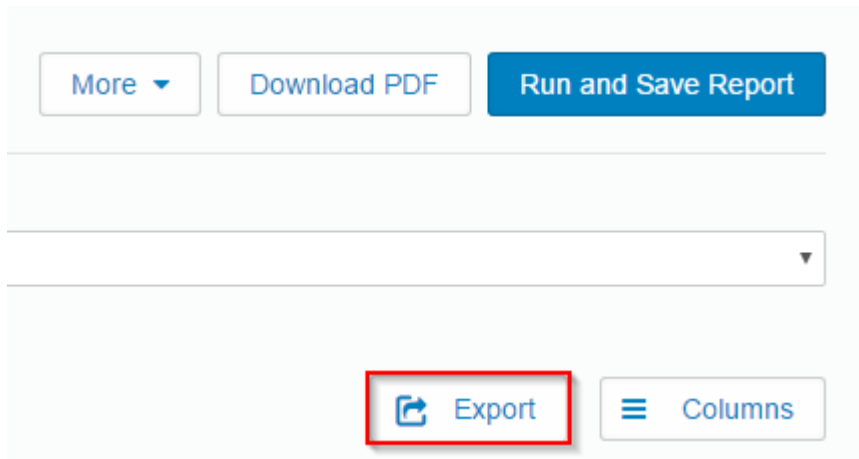
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Export a Grid Report

To export your report as a PDF, click the **Download PDF** button.



To export your report as a CSV file, click the **Export** button just above the upper right-hand corner of your report.



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