



Grid Reports

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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.



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



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.



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



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



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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