



[Knowledgebase](#) > [Settings](#) > [Grid Reports](#)

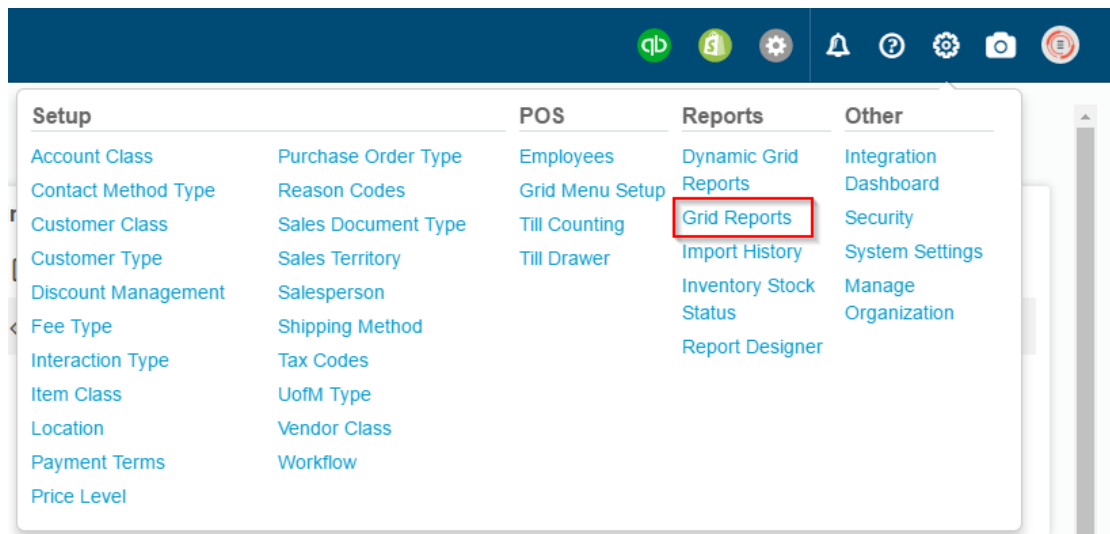
# Grid Reports

Cavallo IT - 2025-08-06 - [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.



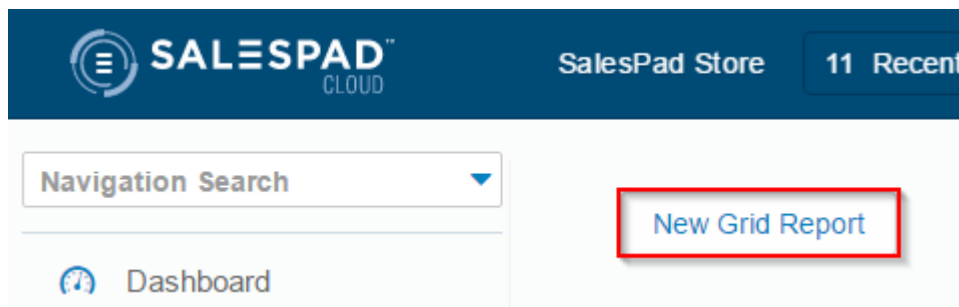
## Navigation Menu

- [Grid Reports](#)
  - [Create a Grid Report](#)
  - [Set Advanced Filters](#)
  - [Delete a Grid Report](#)
- [Run a Grid Report](#)
- [Export a Grid Report](#)

## 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.

## New Report

 Feedback



Name

Report Source

Group by

Select columns to show

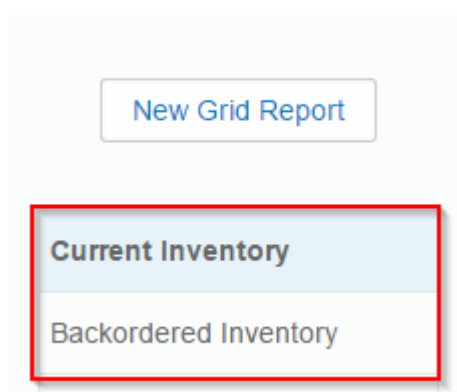
Please select a Report Source to see available columns.

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

[Back to Navigation Menu](#)

### 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.

## Set Advanced Filters

 Feedback

✕




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.

[Back to Navigation Menu](#)

### 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.





More Actions ▾

Download PDF

Run and Save Report

Run Report

Delete

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

Delete Report

Are you sure you want to delete report Current Inventory ?

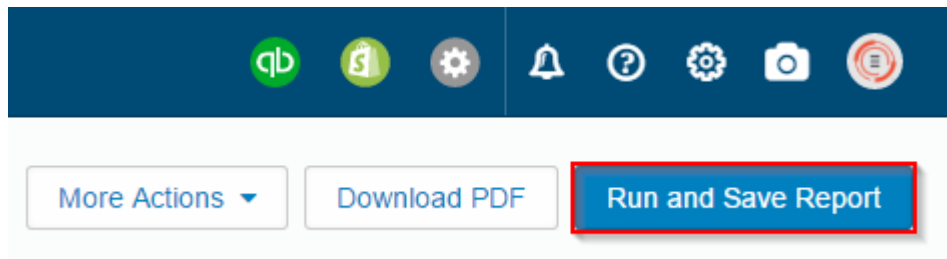
No

Yes

[Back to Navigation Menu](#)

#### 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](#).

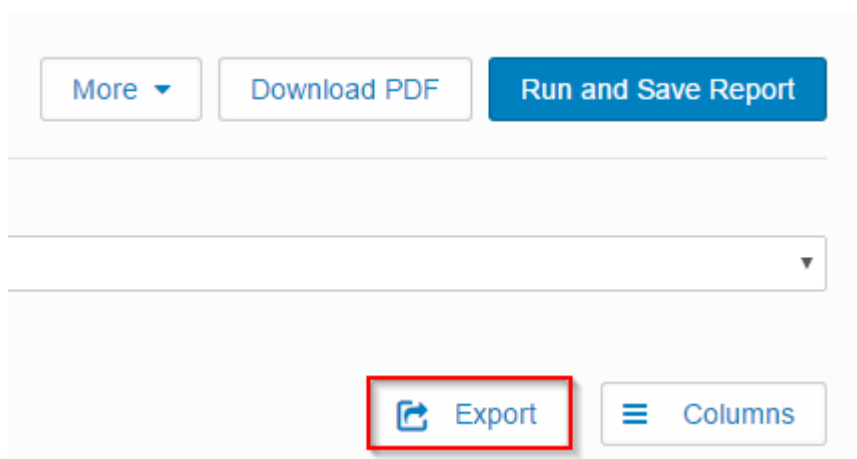
[Back to Navigation Menu](#)

#### 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.



[Back to Navigation Menu](#)