



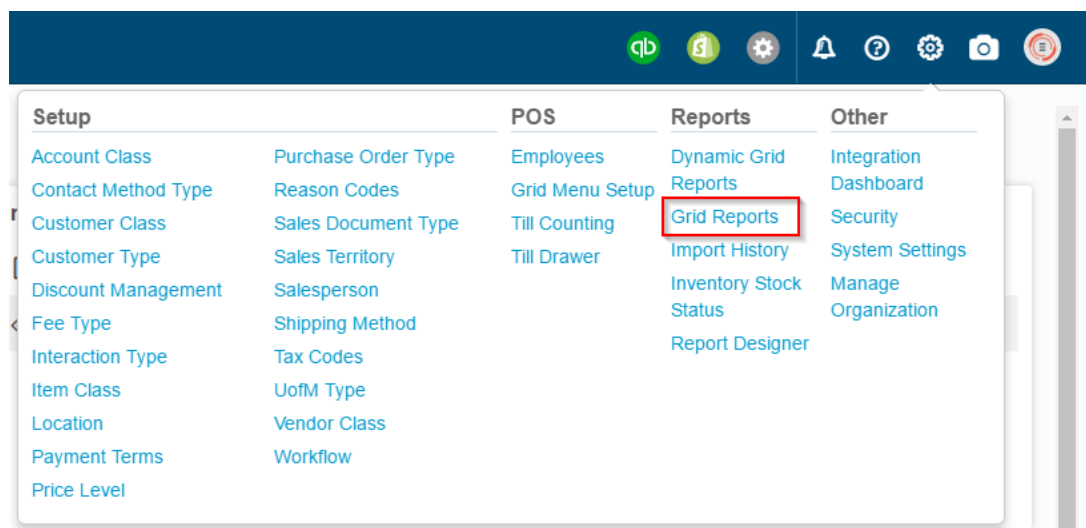
Grid Reports

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.

 **SALESPAD™**
CLOUD

SalesPad Store

11 Recent

Navigation Search

Dashboard

New Grid Report

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

Feedback

New Report

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.

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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.

New Grid Report

Current Inventory

Backordered Inventory

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

×

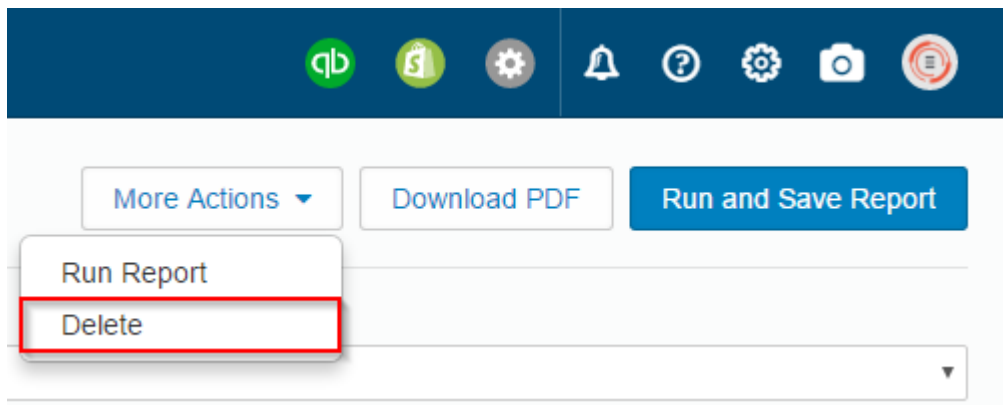
Item Class	<input type="text"/>
Sku	<input type="text"/>
Upc	<input type="text"/>
Item Number	<input type="text"/>
Item Description	<input type="text"/>
Warehouse Name	<input type="text"/>
Unit Cost	<input type="text" value="Add Filter"/>
Qty	<input type="text" value="Add Filter"/>
Uofm	<input type="text"/>
Abbreviation	<input type="text"/>
Extended Cost	<input type="text" value="Add Filter"/>

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

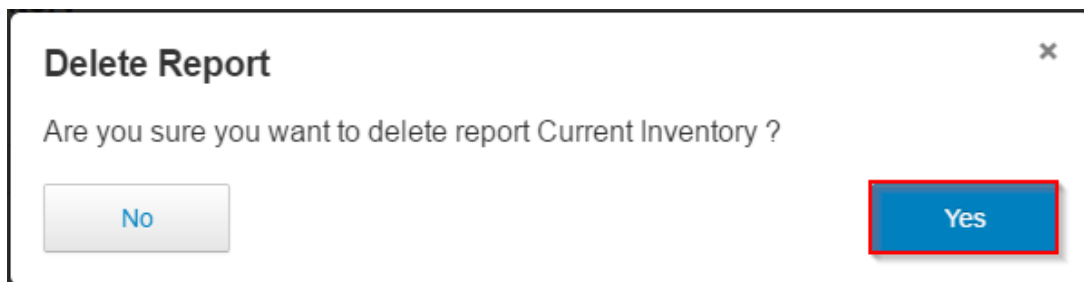
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Delete a Grid Report

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.



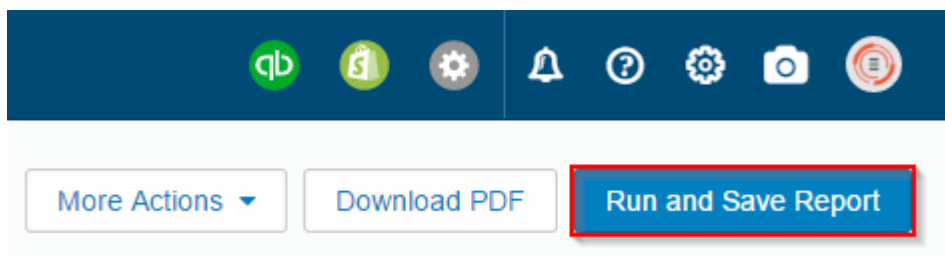
Click **Yes** in the Delete Report window that appears.



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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](#).

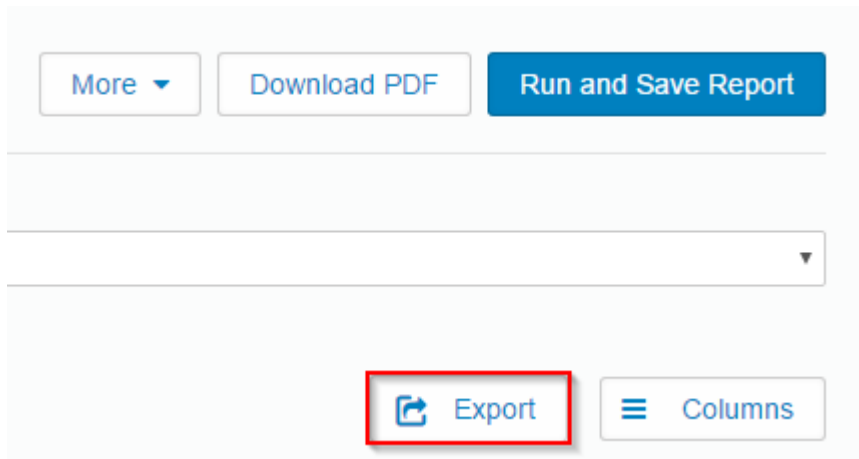
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Export a Grid Report

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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