



Grids Filtering and Customizing

Megan De Freitas - 2024-11-22 - System

Overview

All columned grids throughout SalesPad are customizable. Individual users can choose to display only certain information and changes will remain for the individual user on subsequent logins.

Some individual grid customizations require proper security. Refer to the [SalesPad Security Settings](#) guide for more information (example: Can Export Grid sub-setting).

Arranging Columns

Click and drag column headers to organize their position on the grid:

Phone 1	Email	Phone 1	Sales Person ID
	steveharrison4...		PAUL W.
	steve2@salespa...		GREG E.
	steve@salespad...		PAUL W.
	steve@salespad...		IAN M.
(616) 455-6788	ryans@abbott.com		GREG E.
(316) 555-0161	jwhitson@bya.com		SANDRA M.

Adding and Removing Columns

To remove a column, click and drag the column header down until the “X” appears:

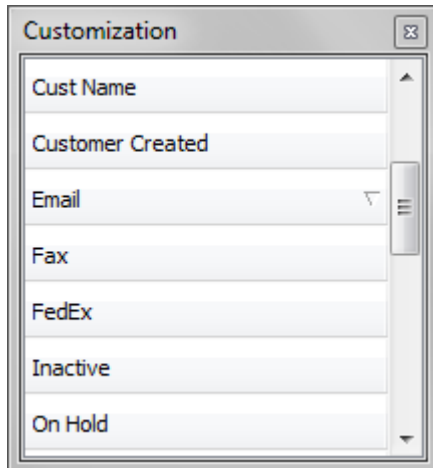
Email	Sales Person ID	Address 1
steveharrison4...	PAUL W.	1234 Ma...
steve2@salespa...	GREG E.	1234 Main
steve@salespad...	PAUL W.	1234 Ma...
steve@salespad...	IAN M.	123 Mai...
ryans@abbott.com	GREG E.	123 S. 6...

To add a column, right-click on the header and select “Column Chooser”:

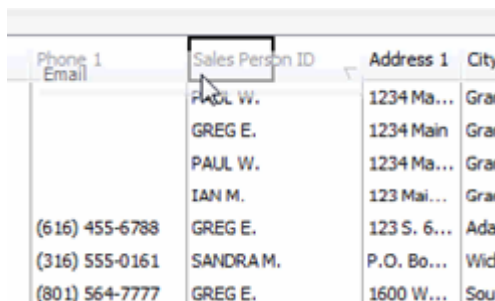
10	09	JTVASCU01	YOND0001	TMED01
		(616) 45	(316) 55	(801) 56
				(801) 56


- Sort Ascending
- Sort Descending
- Clear Sorting
- Group By This Column
- Group By Box
- Column Chooser
- Best Fit

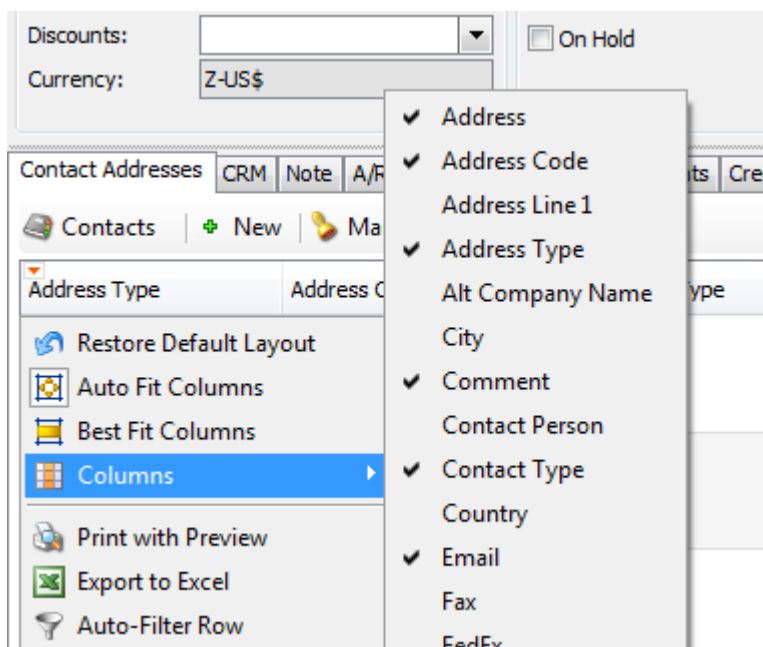
A customization box opens:



Find the desired column and drag it from the box to the desired location on the header:



You can also click the orange triangle () drop-down in the top left corner and choose columns to display from the “Columns” drop-down:



Orange Triangle / Filtering

In addition to adding columns, the orange triangle drop-down also allows printing and exporting of grid information (“Print with Preview” or “Export to Excel”), default layout and fit options, and access to the auto-filter row, where you can filter the grid display by an

entered search term:

Address Type	Address Code	Contact Type	Address	Phones	Web Site
	TEMP		Robert Fitz 11403 45 St. South Redmond, WA 98052-6399	P1:(312) 555-0102 P2:(312) 555-0102 FX:(425) 876-9988	www.afe.com
SHIP	WAREHOUSE		Robert Fitz 11403 45 St. South Chicago, IL 60603-0776	P1:(312) 555-0102 P2:(312) 555-0102 FX:(312) 555-0102	www.afe.com

Wildcards

Use the % and * wildcards with the filter line:

For example, typing "andr" will return results for Andrew, but "%andr" or "*andr" will return anything containing those letters, and would return both Andrew and Sandra.

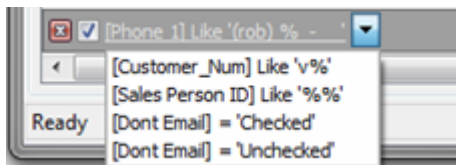
Removing Filters

If you remove the auto-filter row, the grid display will still be filtered by any entered search term until the filter is removed. Remove the filter either by selecting "Remove Filters" from the orange triangle drop-down, or by unselecting the search term check box or closing the display on the bottom of the screen:

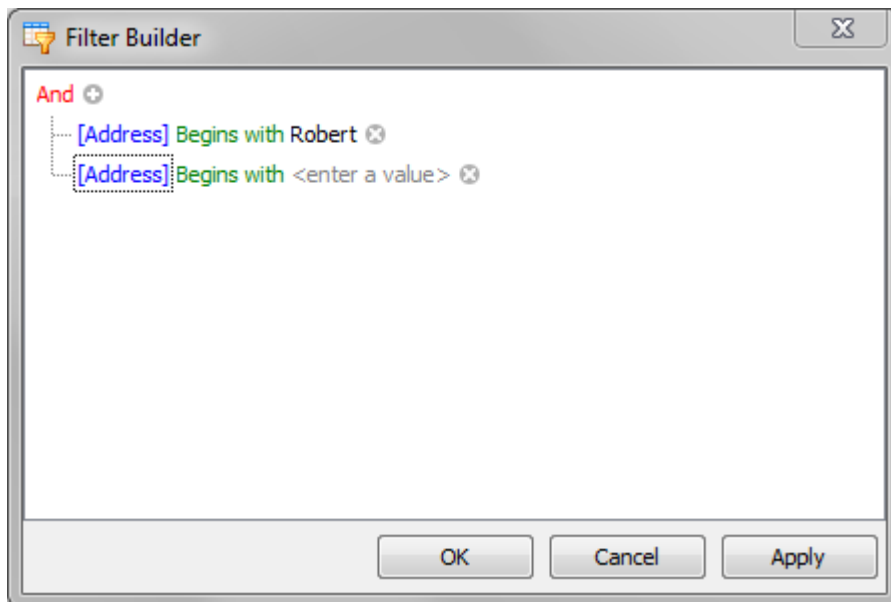


Editing Filters

If more than one filter was used, you can click the down arrow on the bottom display and choose a filter to re-apply:

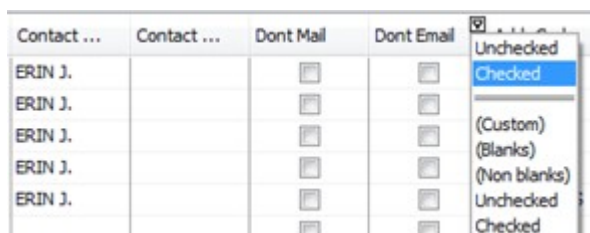


You can also click "Edit Filter" on the right side of this display and change the current filter by clicking the "+" or "x" symbols, entering any values, and clicking "Apply":



Column Filters

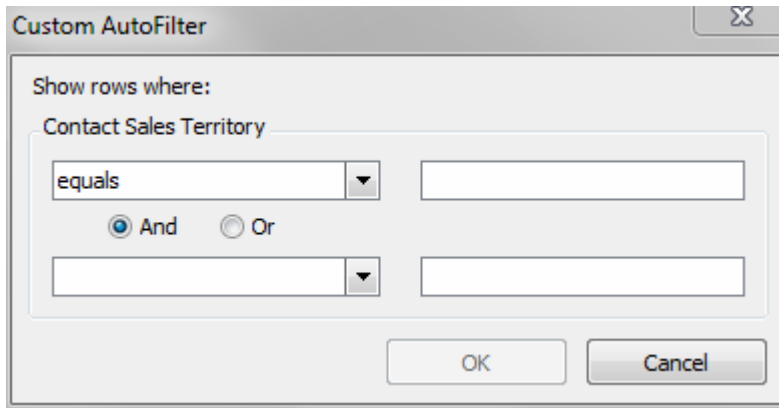
Some columns have an icon indicating that you can filter by results. Click the icon and select a filter from the drop-down:



In the example, the filter choices were “Unchecked” and “Checked.” With “Checked” selected, the results are now filtered so only results with the “Don’t Email” box checked display:

Contact ...	Contact ...	Dont Mail	Dont Email	Addr Code
GREG E.	TERRITORY 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MAIN
GREG E.		<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRIMARY
GREG E.		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
GREG E.	TERRITORY 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	MAIN
GREG E.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	INVOICES

If you select “Custom” from the filter drop-down, you can create a custom filter from the “Custom AutoFilter” popup:



Select a filter and enter a value in the field. The grid will return only results matching the entered filter.

Auto Filter Row

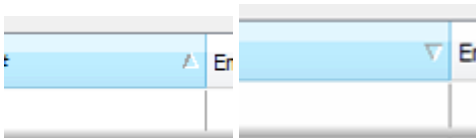
If this is set to “True,” whenever an auto-filter row is used on any grid view and closed the next time the grid-view is opened, the previous value in the auto-filter row will be restored (this is our default behavior).

When set to “False,” whenever an auto-filter row is used on any grid view and closed the next time the grid-view is opened, the auto-filter row will be blank.

This also affects user defined fields that have a quick report view.

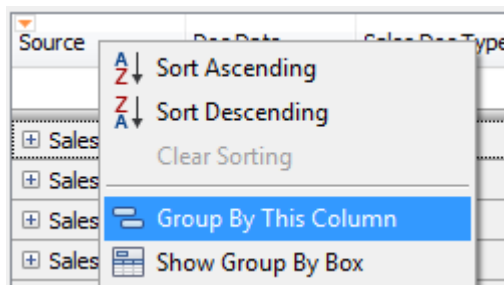
Organizing Results

Click on a column header to toggle the display, sorting in ascending/descending order (for example, alphabetical or reverse alphabetical order). The arrow on the right side of the column will indicate if it is being sorted ascending or descending:



Grouping by Column

Users can right-click on a column header and select “Group By This Column” to change the grid layout to expandable/collapsible sections based on the chosen column header:



Doc#	Doc Date	Customer
[-] Batch: SOP ORDERS		
ORDST2225	05/23/2017	Central Distribu
[-] Batch: SOP INVOICES		
STDINV2260	04/12/2017	Aaron Fitz Elec
STDINV2255	05/23/2017	Laser Messeng
STDINV2256	05/23/2017	Franchise Offic
[-] Batch: ORDERS4/12		
ORDST2228	04/12/2017	Cellular Express
ORDST2227	04/12/2017	Berry Medical C
ORDST2226	04/12/2017	Aaron Fitz Elec
[-] Batch: DOCS		
STDINV2259	04/12/2017	Central Commu
ORDST2229	04/12/2017	Alton Manufact

You can ungroup by selecting "Show Group By Box," right-clicking on the column name in the "Group By Box," and selecting "Ungroup." For more details on using advanced grouping features, please [contact SalesPad support](#).

Any grid organization, position of columns, or filters left upon log out will persist the next time the user logs in.