Grids Filtering and Customizing

Cavallo Support - 2025-12-04 - System

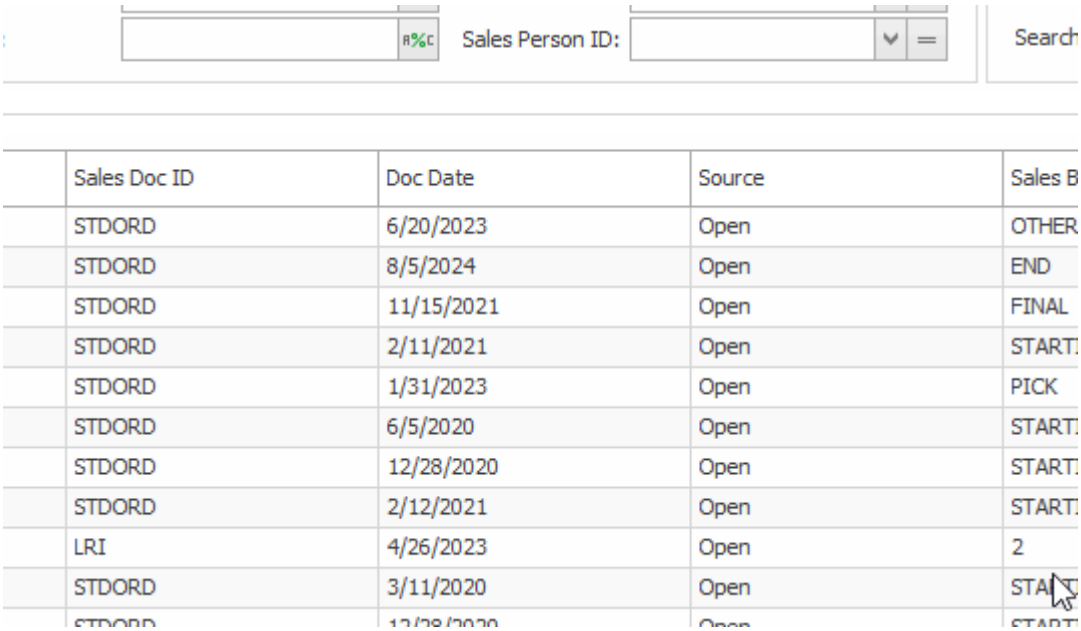
Overview

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 Security Editor Managing Users and Groups guide for more information (example: Can Export Grid sub-setting).

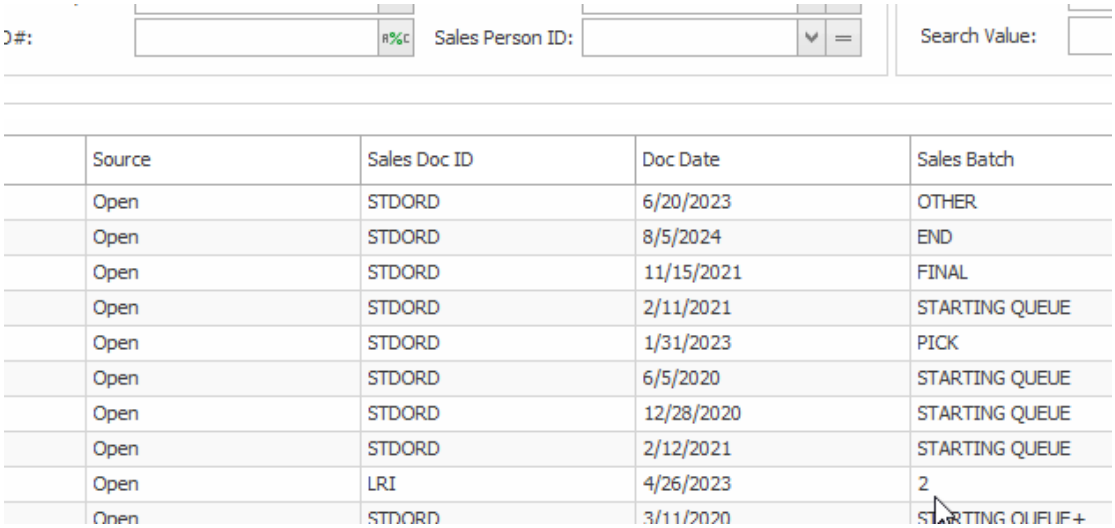
Arranging Columns

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

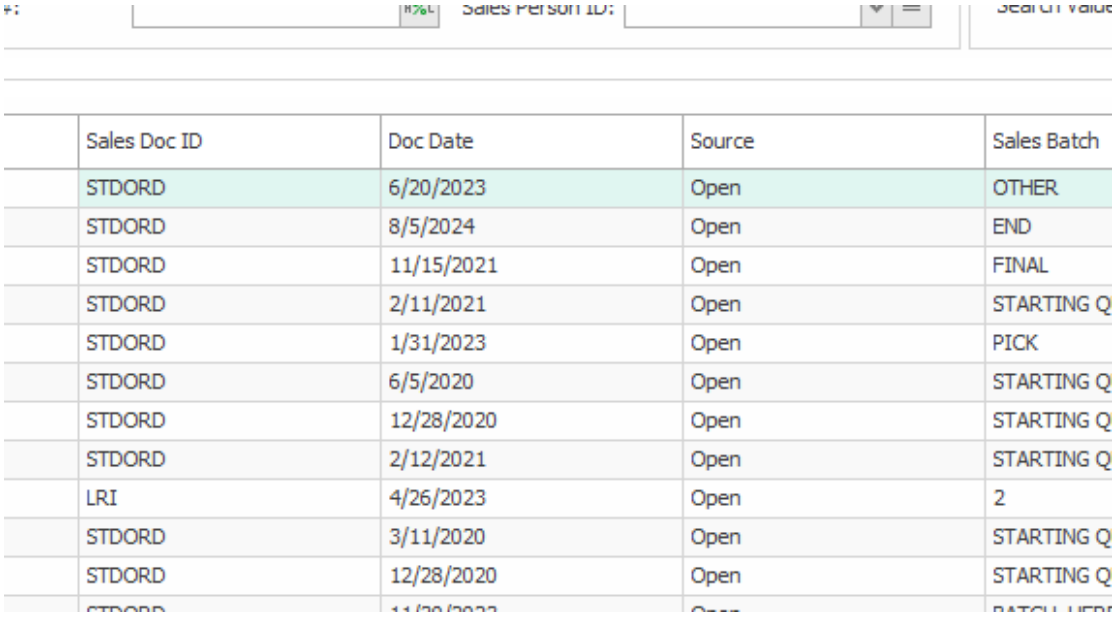


Adding and Removing Columns

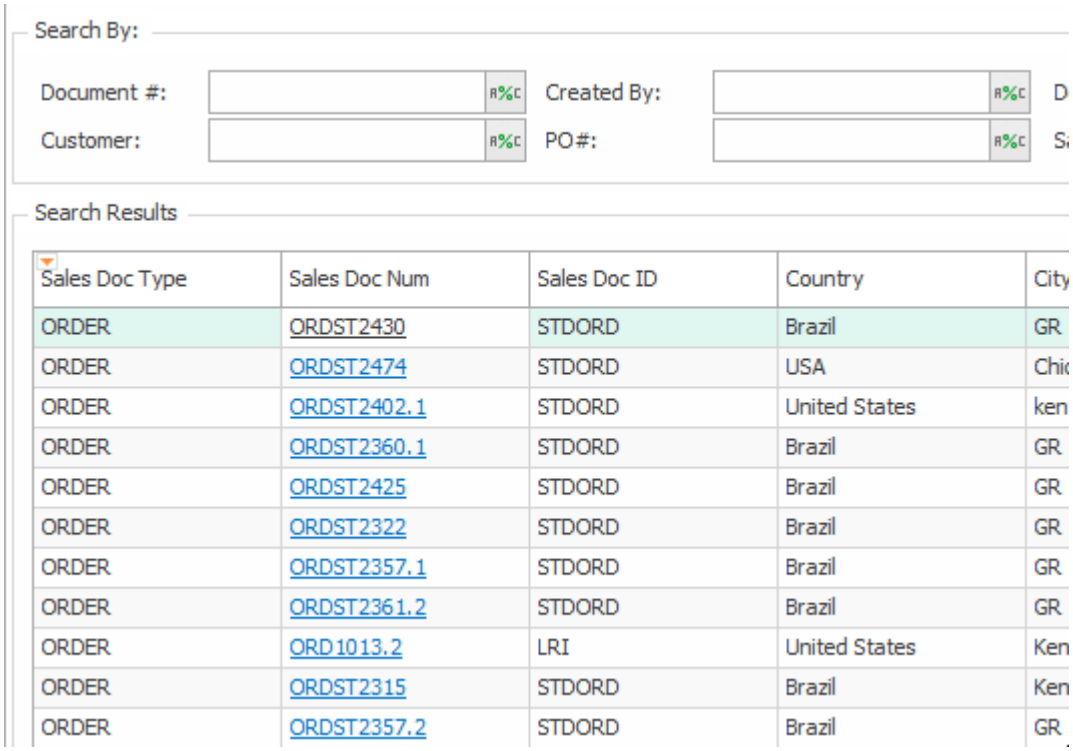
To remove a column, click and drag the column header down until the “X” appears:



To add a column, right-click on the header and select “Column Chooser”. A customization window will open where you may find the desired column and drag it from the box to any location on the header:

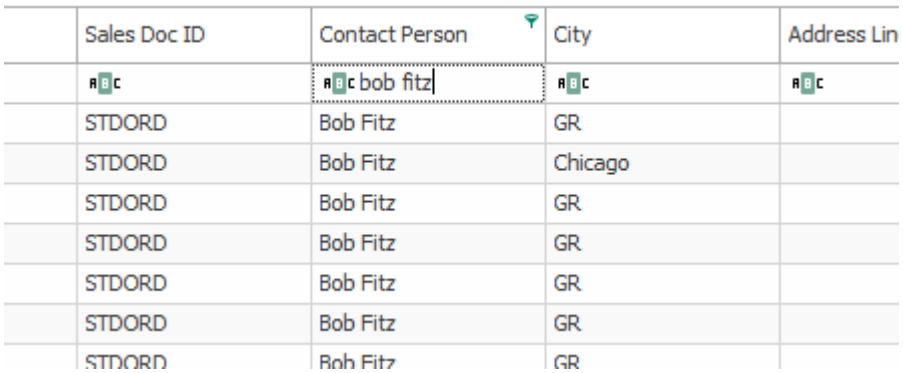


You can also click the orange triangle drop-down in the top left corner of the grid and choose columns to display from the “Columns” drop-down:



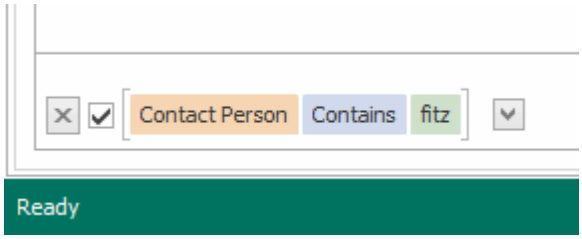
Orange Triangle / Filtering

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:



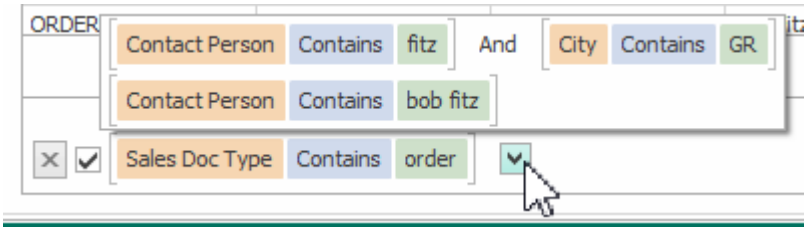
Removing Filters

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:

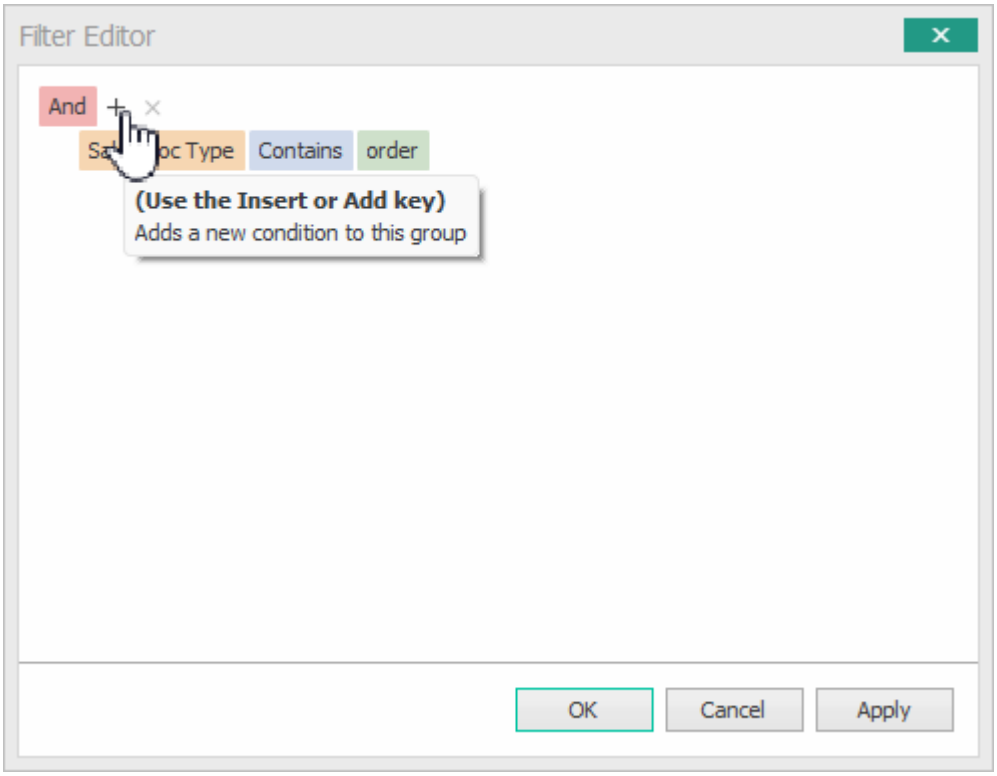


Editing Filters

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

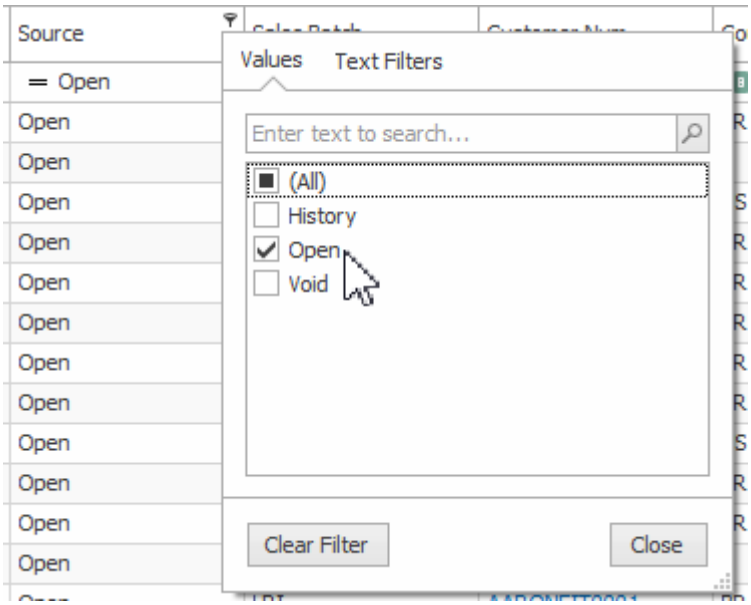


You can also click “Edit Filter” on the right side of this display and change the current filter by clicking the “+” or “x” symbols, entering any values, and clicking “Apply”:

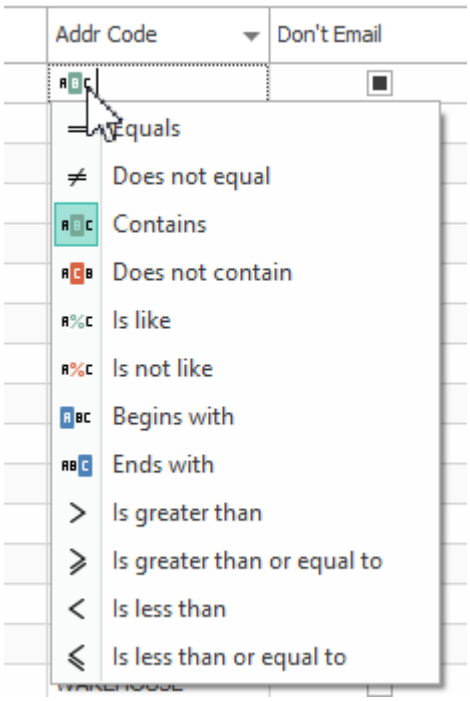


Column Filters

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



You may click the filter icon within the Auto Filter Row to change how your criteria is filtered:



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

Auto Filter Row

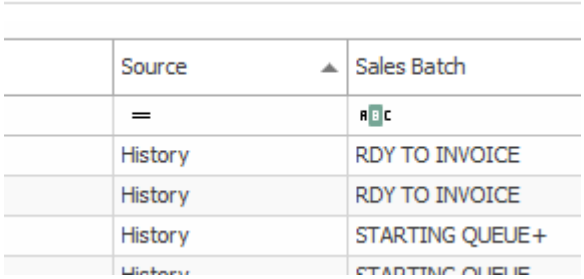
If this is set to “True,” whenever an auto-filter row is used on any grid view and closed the next time the grid-view is opened, the previous value in the auto-filter row will be restored (this is our default behavior).

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.

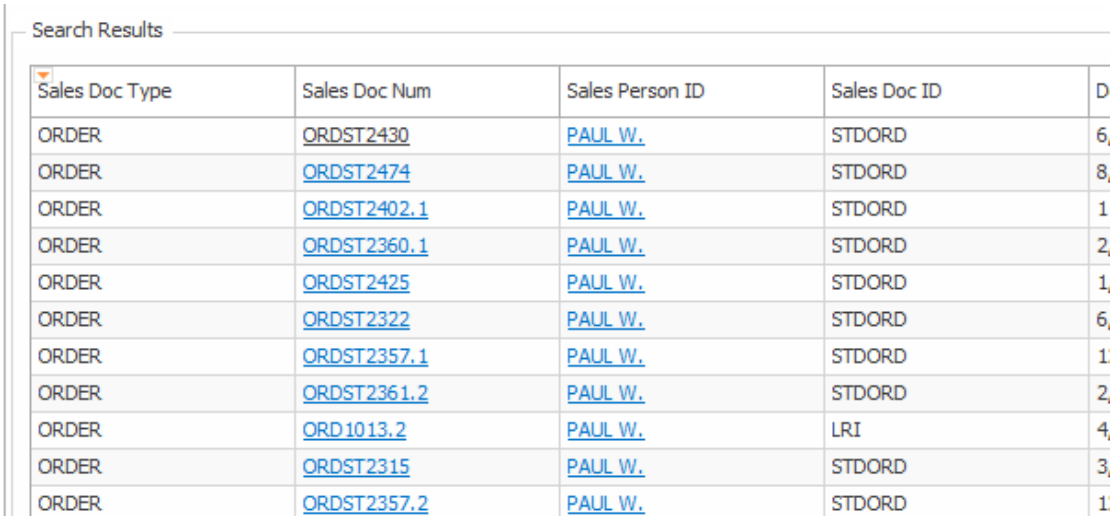
Organizing Results

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:


Search Results

Sales Doc Type	Sales Doc Num	Sales Person ID	Sales Doc ID	D
ORDER	ORDST2430	PAUL W.	STDORD	6,
ORDER	ORDST2474	PAUL W.	STDORD	8,
ORDER	ORDST2402.1	PAUL W.	STDORD	1
ORDER	ORDST2360.1	PAUL W.	STDORD	2,
ORDER	ORDST2425	PAUL W.	STDORD	1,
ORDER	ORDST2322	PAUL W.	STDORD	6,
ORDER	ORDST2357.1	PAUL W.	STDORD	1
ORDER	ORDST2361.2	PAUL W.	STDORD	2,
ORDER	ORD1013.2	PAUL W.	LRI	4,
ORDER	ORDST2315	PAUL W.	STDORD	3,
ORDER	ORDST2357.2	PAUL W.	STDORD	1

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 Contacting Cavallo Support

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

For managing and copying layouts to other users, please see Layout Maintenance.