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Mission Control: Filtering and Saved Filters

Cavallo Support - 2024-11-22 - [Mission Control Documentation](#)

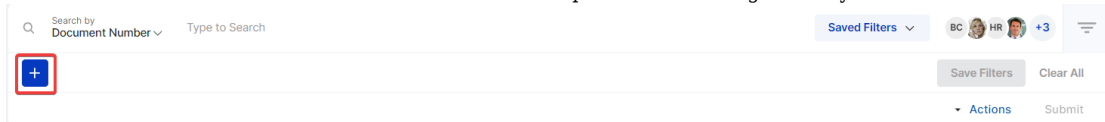
Filters enable users to quickly and easily limit the data shown in a grid by a variety of criteria. Applied filters can also be saved and reused later, without having to completely rebuild the filter from scratch.

In this documentation, we'll explore where and how users can make the most of filters to improve their workflow and surface relevant data more effectively.

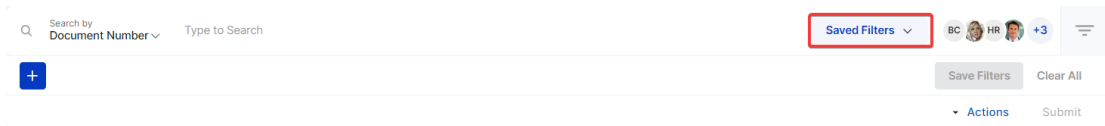
Accessing Filters

Users can access filters two different ways:

Add Filter Button: When users click the filters icon (*funnel icon*), the filters row is revealed, which prominently features a blue "+" icon. This button allows users to add specific filters using a variety of conditions.

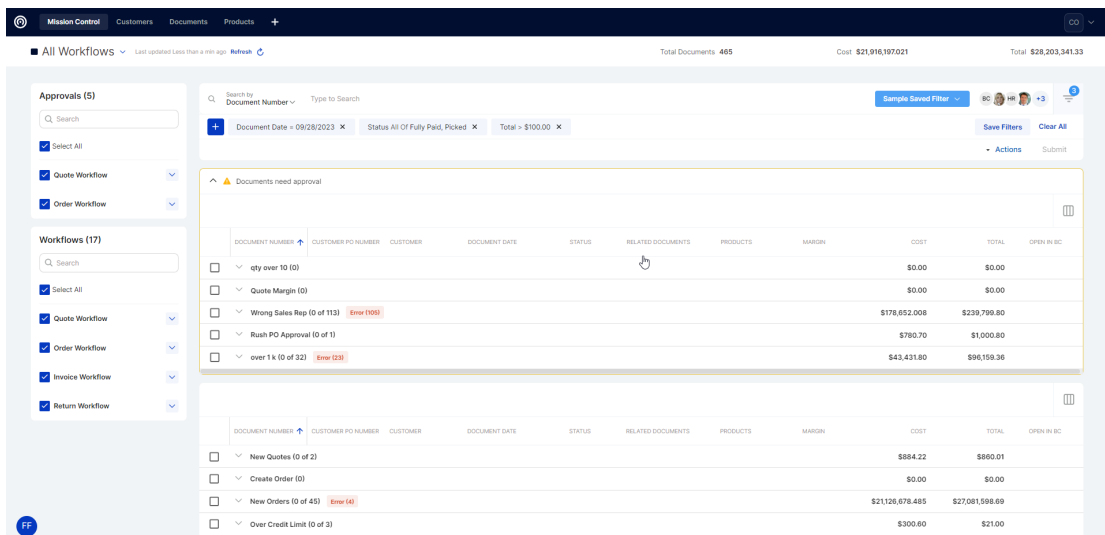


Saved Filters: A dropdown menu in the upper right of the screen containing all the users saved filter sets.



Filtering is available in the below areas of the application:

Mission Control



Document Search

Mission Control Customers Documents Products +

Documents (239) New Document

Search by Document Number Type to Search Saved Filters 1

+ Document Type is Order X Save Filters Clear All

Actions Submit

DOCUMENT NUMBER	CUSTOMER	DOCUMENT DATE	QUEUE	STATUS	RELATED DOCUMENTS	PRODUCTS	MARGIN	COST	TOTAL	SUBTOTAL	OPEN IN BC
S-ORD101005	School of Fine A	Jul 19, 2023	over 1k	Released +3	2	4	22%	\$2,492.40	\$3,418.86	\$3,195.20	🔗
S-ORD101013	Adatum Corporati	Oct 14, 2022	over 1k	Shipped +1	1	1	22%	\$780.70	\$1,060.85	\$1,000.80	🔗
S-ORD101017	Adatum Corporati	Oct 14, 2022	Rush Pick	Partially... +2	1	2	10%	\$931.00	\$1,101.17	\$1,093.52	🔗
S-ORD101023	Adatum Corporati	Oct 14, 2022	Rush Pick	Released +4	3	1	22%	\$780.70	\$1,060.85	\$1,000.80	🔗
S-ORD101025	Adatum Corporati	Sep 19, 2023	Ready To Invoice	Released +3	3	3	22%	\$1,269.20	\$1,724.83	\$1,627.20	🔗
S-ORD101026	Adatum Corporati	Oct 14, 2022	Wrong Sales Rep	Partially... +2	3	3	22%	\$3,903.50	\$5,004.00	\$5,004.00	🔗
S-ORD101031	Adatum Corporati	Oct 14, 2022	over 1k	Released +2	1	1	22%	\$780.70	\$1,060.85	\$1,000.80	🔗
S-ORD101041	Adatum Corporati	Sep 19, 2023	Ready To Invoice	Released +4	2	1	22%	\$780.70	\$1,060.85	\$1,000.80	🔗
S-ORD101071	Adatum Corporati	Oct 27, 2022	Ready To Invoice	Pending Pr... +3	2	1	22%	\$780.70	\$1,060.85	\$1,000.80	🔗
S-ORD101072	Adatum Corporati	Oct 31, 2022	Wrong Sales Rep	Pending Pr... +2	2	2	22%	\$931.00	\$1,265.22	\$1,193.60	🔗

Rows per page: 10 1-10 of 239 1 2 3 ... 24 >

Product Card

Mission Control Customers Documents Products +

Products > ATHENS Desk

ATHENS Desk 🔗

Description: ATHENS Desk
Type: Inventory
Base UoFM: PCS
Unit Price: 1000.8
Unit Cost: 780.7
Item Tracking
Replenishment

Open Documents (204) Inventory Archived Documents Posted Invoices Variants

Search by Document Number Type to Search Saved Filters 1

+ Total > \$100.00 X Save Filters Clear All

Actions Submit

DOCUMENT NUMBER	CUSTOMER	DOCUMENT DATE	QUEUE	STATUS	MARGIN	COST	DOCUMENT TYPE	OPEN IN BC
S-INV102007	Adatum Corporati	Jan 24, 2021	New Invoice	Released	22%	\$8,559.30	Invoice	🔗
S-INV102012	School of Fine A	Jan 30, 2021	New Invoice	Released	22%	\$8,335.40	Invoice	🔗
S-INV102020	Adatum Corporati	Feb 22, 2021	New Invoice	Released	22%	\$10,120.70	Invoice	🔗
S-INV102024	School of Fine A	Feb 26, 2021	New Invoice	Released	22%	\$8,559.10	Invoice	🔗
S-INV102033	Adatum Corporati	Mar 24, 2021	New Invoice	Released	22%	\$13,219.30	Invoice	🔗
S-INV102038	School of Fine A	Mar 30, 2021	New Invoice	Released	22%	\$12,216.10	Invoice	🔗
S-INV102044	Adatum Corporati	Apr 22, 2021	New Invoice	Released	22%	\$15,542.20	Invoice	🔗
S-INV102049	School of Fine A	Apr 26, 2021	New Invoice	Released	22%	\$11,033.20	Invoice	🔗
S-INV102059	Adatum Corporati	May 24, 2021	New Invoice	Released	22%	\$12,139.40	Invoice	🔗
S-INV102064	School of Fine A	May 30, 2021	New Invoice	Released	22%	\$11,285.10	Invoice	🔗

204 Documents \$151,537.47

Rows per page: 10 1-10 of 204 1 2 3 ... 21 >

Customer Card

Mission Control Customers Documents Products +

Customers > Adatum Corporation

Adatum Corporation 🔗

General Business Posting Group: DOMESTIC
Website: cavallo.com
Tax Area: AVATAX
Currency: US dollar (\$) \$62,245.51
Balance: \$62,245.51
Payment Terms: TM(BD)
Payment Method: CARD

Address

Primary Address
2 Levees Road
Alpharetta, GA, 31712, US

Shipping Address
2 Levees Road
Alpharetta, GA, 31712, US

Open Documents (231) Products Posted Invoices Archived Documents Notes (13) Addresses Contacts Wallet About

Search by Document Number Type to Search Saved Filters 1

+ Document Type is Order X Save Filters Clear All

Actions Submit

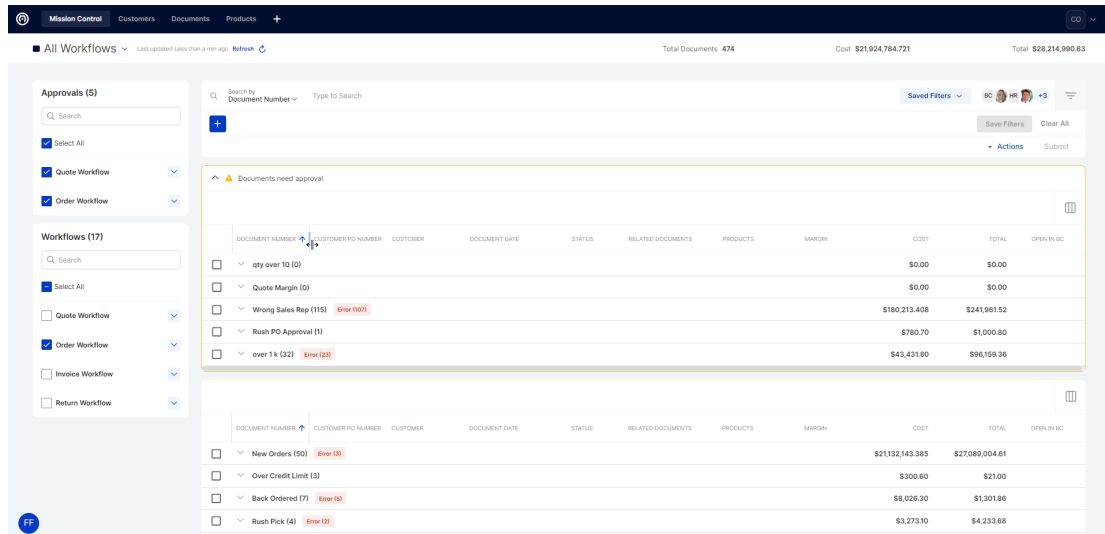
DOCUMENT NUMBER	DOCUMENT DATE	STATUS	MARGIN	COST	TOTAL	DOCUMENT TYPE	OPEN IN BC
S-ORD101013	Oct 14, 2022	Shipped +1	22%	\$780.70	\$1,060.85	Order	🔗
S-ORD101017	Oct 14, 2022	Partially... +2	10%	\$931.00	\$1,101.17	Order	🔗
S-ORD101023	Oct 14, 2022	Released +4	22%	\$780.70	\$1,060.85	Order	🔗
S-ORD101025	Sep 19, 2023	Released +3	22%	\$1,269.20	\$1,724.83	Order	🔗
S-ORD101026	Oct 14, 2022	Partially... +2	22%	\$3,903.50	\$5,004.00	Order	🔗
S-ORD101031	Oct 14, 2022	Released +2	22%	\$780.70	\$1,060.85	Order	🔗
S-ORD101041	Sep 19, 2023	Released +4	22%	\$780.70	\$1,060.85	Order	🔗
S-ORD101071	Oct 27, 2022	Pending Pr... +3	22%	\$780.70	\$1,060.85	Order	🔗
S-ORD101072	Oct 31, 2022	Pending Pr... +3	22%	\$931.00	\$1,265.22	Order	🔗
S-ORD101073	Nov 01, 2022	Pending Pr... +3	22%	\$2,342.10	\$3,192.54	Order	🔗

Rows per page: 10 1-10 of 231 1 2 3 ... 24 >

Saving a Filter Set

To save a set of filters for later use, users can click the "Save Filter" button located on the far right side of the screen. After clicking the button, a pop-up window will appear, allowing users to name their new filter set. Once

the name is saved, it will be applied to the saved filters dropdown, confirming the successful save. The below video illustrates how to save a filter in Cavallo.

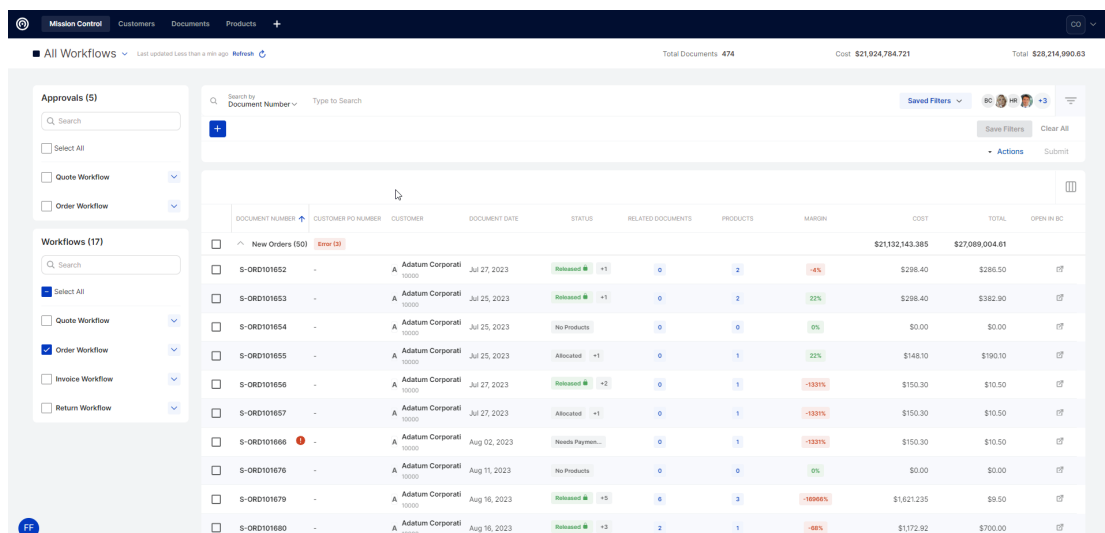


Saving a filter

Enabling a Saved Filter

After a filter set has been saved, it will become accessible within the saved filters dropdown menu. To activate a filter set, users should follow the below steps:

1. Click the dropdown menu, and from the list, select the desired filter set.
2. Upon selection, the chosen filter set's name will replace the "Saved Filters" text on the dropdown menu.
3. If the saved filters bar is currently visible, you will observe the filter chips displayed within the bar.
4. In case the filters bar is collapsed, a noticeable blue bar will extend across the screen to inform the user that a filter has been applied.



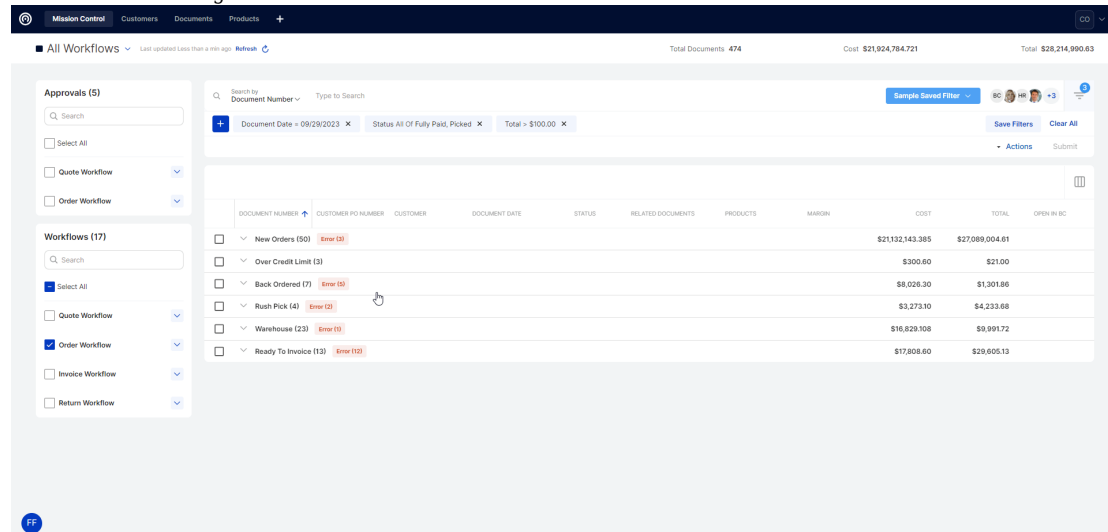
Enabling a Saved Filter

Clearing a Filter

Once users apply a filter or filter set, there are two ways to clear them out:

Individual Removal: To clear filters one by one, users can simply click the "x" icon located on each filter chip.

Bulk Removal: Alternatively, users can clear the entire set of applied filters by utilizing the "clear all" button situated on the far right of the filters bar.



Clearing filters

Editing a Saved Filter

The methods available to edit a saved filter include:

- Renaming the filter set
- Deleting the filter set
- Updating criteria

To rename or delete filter sets, users can navigate to the "Saved Filters" dropdown menu located under the ellipsis. It's important to note that both renaming and deleting filters are single actions, requiring users to perform these tasks individually for each specific saved filter set. In the event that a saved filter, which is presently applied to the tables, is deleted, the filter will be removed from the screen, and the dropdown name will automatically revert to displaying "Saved Filters."

The screenshot shows the 'All Workflows' section in the Mission Control system. It features a search bar at the top with a dropdown for 'Document Number' and a 'Type to Search' field. Below the search bar is a table with the following columns: DOCUMENT NUMBER, CUSTOMER PO NUMBER, CUSTOMER, DOCUMENT DATE, STATUS, RELATED DOCUMENTS, PRODUCTS, MARGIN, and COST. The table contains several rows representing different workflow categories, each with a checkbox, a dropdown arrow, a count, and an error status. The categories and their details are:

Category	Count	Error Status	Margin	Cost
New Orders	50	Error (3)	\$21,132,143.385	\$27,088
Over Credit Limit	3		\$300.60	
Back Ordered	7	Error (3)	\$8,026.30	\$1
Rush Pick	4	Error (2)	\$3,273.10	\$4
Warehouse	23	Error (1)	\$16,829.108	\$1
Ready To Invoice	13	Error (12)	\$17,808.60	\$21

Renaming & Deleting filters

To update a saved filter, users can apply an existing filter, make changes to it, and save it as a new filter. The video below illustrates these steps:

This screenshot is identical to the one above, showing the 'All Workflows' section in the Mission Control system. It features a search bar at the top with a dropdown for 'Document Number' and a 'Type to Search' field. Below the search bar is a table with the following columns: DOCUMENT NUMBER, CUSTOMER PO NUMBER, CUSTOMER, DOCUMENT DATE, STATUS, RELATED DOCUMENTS, PRODUCTS, MARGIN, and COST. The table contains several rows representing different workflow categories, each with a checkbox, a dropdown arrow, a count, and an error status. The categories and their details are:

Category	Count	Error Status	Margin	Cost
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Over Credit Limit	3		\$300.60	
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Rush Pick	4	Error (2)	\$3,273.10	\$4
Warehouse	23	Error (1)	\$16,829.108	\$1
Ready To Invoice	13	Error (12)	\$17,808.60	\$21

Editing a Saved Filter

FAQs

Can role based filter sets be created?

Saved filters are only available at the user level meaning that each individual can save their own sets of filters. These filter sets are company specific and currently can only be saved by individual users rather than groups of users and individual filter sets may not be shared (exported).

How many filters sets can be saved?

Users can save up to 10 filter sets per page where saved filters are supported.

Are there any security settings needed to utilize this feature?

No, additional security settings are needed to use saved filters.

Do filters reset when the page refreshes?

Filters persist even if a page refreshes. Users will have to remove the filter manually in order to reset the grid to a default view.

Can users save duplicate filters?

Yes, duplicate filters with the same name can be saved, although this is not recommended behavior.