



Mission Control: Filtering and Saved Filters

Megan De Freitas - 2024-11-22 - Mission Control Documentation

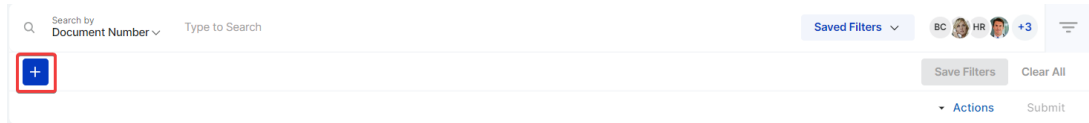
Filters enable users to quickly and easily limit the data shown in a grid by a variety of criteria. Applied filters can also be saved and reused later, without having to completely rebuild the filter from scratch.

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.

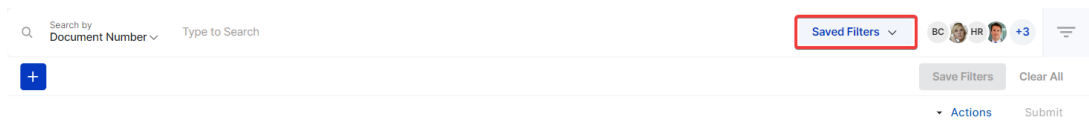
Accessing Filters

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.

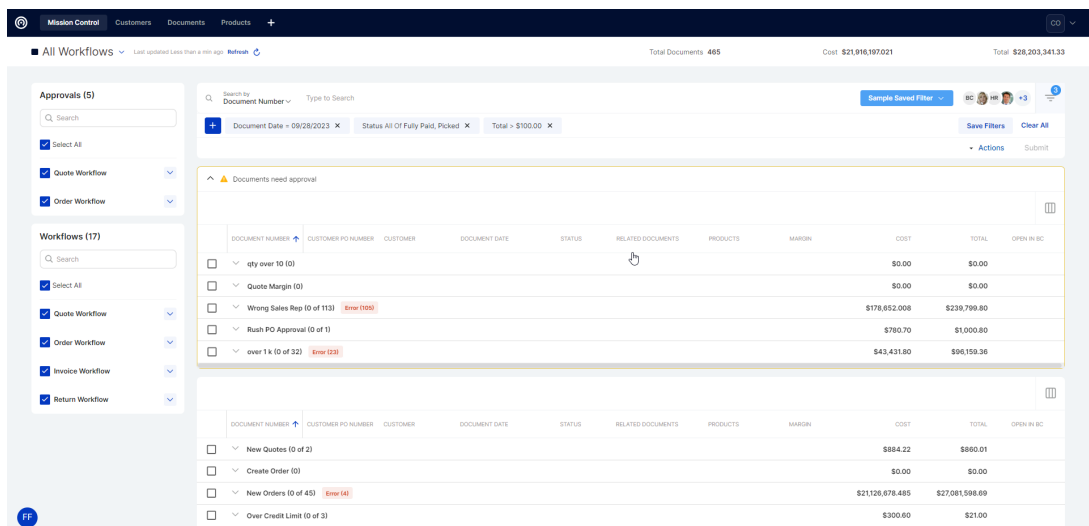


Saved Filters: A dropdown menu in the upper right of the screen containing all the users saved filter sets.



Filtering is available in the below areas of the application:

Mission Control



Document Search

Mission ControlCustomersDocumentsProducts+

Documents (239)

New Document

Search by Document NumberType to Search

Document Type is Order

Save FiltersClear All

ActionsSubmit

| 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 | 22% | \$2,492.40 | \$3,418.86 | \$3,195.20 | |
| S-ORD101013 | Adatum Corporati | Oct 14, 2022 | over 1k | Shipped | +1 | 1 | 22% | \$780.70 | \$1,060.85 | \$1,000.80 | |
| S-ORD101017 | Adatum Corporati | Oct 14, 2022 | Rush Pick | Partially | +2 | 1 | 10% | \$931.00 | \$1,101.17 | \$1,093.52 | |
| S-ORD101023 | Adatum Corporati | Oct 14, 2022 | Rush Pick | Released | +4 | 3 | 22% | \$780.70 | \$1,060.85 | \$1,000.80 | |
| S-ORD101025 | Adatum Corporati | Sep 19, 2023 | Ready To Invoice | Released | +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 | 22% | \$3,903.50 | \$5,004.00 | \$5,004.00 | |
| S-ORD101031 | Adatum Corporati | Oct 14, 2022 | over 1k | Released | +2 | 1 | 22% | \$780.70 | \$1,060.85 | \$1,000.80 | |
| S-ORD101041 | Adatum Corporati | Sep 19, 2023 | Ready To Invoice | Released | +4 | 2 | 22% | \$780.70 | \$1,060.85 | \$1,000.80 | |
| S-ORD101071 | Adatum Corporati | Oct 27, 2022 | Ready To Invoice | Pending Pl. | +3 | 2 | 22% | \$780.70 | \$1,060.85 | \$1,000.80 | |
| S-ORD101072 | Adatum Corporati | Oct 31, 2022 | Wrong Sales Rep | Pending Pl. | +3 | 2 | 22% | \$931.00 | \$1,265.22 | \$1,193.60 | |

Rows per page: 101-10 of 239123...24

Product Card

Mission ControlCustomersDocumentsProducts+

Products > ATHENS Desk

ATHENS Desk

DescriptionATHENS DeskTypeInventoryBase UPMPCSSuit Price1000.8Unit Cost780.7Item TrackingReplenishment

Open Documents (204)InventoryArchived DocumentsPosted InvoicesVariants

Search by Document NumberType to Search

Total > \$100.00

Save FiltersClear All

ActionsSubmit

| 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% | \$13,229.30 | 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 Documents1-10 of 204123...21

Customer Card

Mission ControlCustomersDocumentsProducts+

Customers > Adatum Corporation

Adatum Corporation

General Business Posting GroupDOMESTICWebsitecavaleo.comTax AreaAVATAXCurrencyUS dollar (\$)Balance\$62,245.51Payment Terms1M(BD)Payment MethodCARD

Address

Primary Address2 Lanes RoadAtlanta, GA, 31172, USShipping Address2 Lanes RoadAtlanta, GA, 31172, US

Open Documents (281)ProductsPosted InvoicesArchived DocumentsNotes (13)AddressesContactsWalletAbout

Search by Document NumberType to Search

Document Type is Order

Save FiltersClear All

ActionsSubmit

| 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 Pl. | +3 | 22% | \$780.70 | \$1,060.85 | Order | |
| S-ORD101072 | Oct 31, 2022 | Pending Pl. | +3 | 22% | \$931.00 | \$1,265.22 | Order | |
| S-ORD101073 | Nov 01, 2022 | Pending Pl. | +3 | 22% | \$2,342.10 | \$3,182.54 | Order | |

Rows per page: 101-10 of 281123...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.

The screenshot shows the Cavallo Mission Control interface. On the left, there are panels for 'Approvals (5)' and 'Workflows (17)'. The main area displays a table of documents that need approval. The table has columns for Document Number, Customer PO Number, Customer, Document Date, Status, Related Documents, Products, Margin, Cost, Total, and Open in BC. The table is filtered by 'Documents need approval'.

| DOCUMENT NUMBER | CUSTOMER PO NUMBER | CUSTOMER | DOCUMENT DATE | STATUS | RELATED DOCUMENTS | PRODUCTS | MARGIN | COST | TOTAL | OPEN IN BC |
|-----------------------|--------------------|----------|---------------|------------|-------------------|----------|--------|---------------|--------------|------------|
| Qty over 10 (0) | | | | | | | | \$0.00 | \$0.00 | |
| Quote Margin (0) | | | | | | | | \$0.00 | \$0.00 | |
| Wrong Sales Rep (115) | | | | Error 1027 | | | | \$180,213.408 | \$241,981.52 | |
| Rush PO Approval (1) | | | | | | | | \$780.70 | \$1,000.80 | |
| over 1k (32) | | | | Error 128 | | | | \$43,431.80 | \$98,159.36 | |

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.

Mission Control

Customers

Documents

Products

+

All Workflows

Last updated Less than a min ago

Refresh

Total Documents

474

Cost

\$21,924,784.721

Total

\$28,214,990.63

Approvals (5)

Search

Select All

Quote Workflow

Order Workflow

Workflows (17)

Search

Select All

Quote Workflow

Order Workflow

Invoice Workflow

Return Workflow

Search by Document Number

Type to Search

Saved Filters

Save Filters

Clear All

Actions

Submit

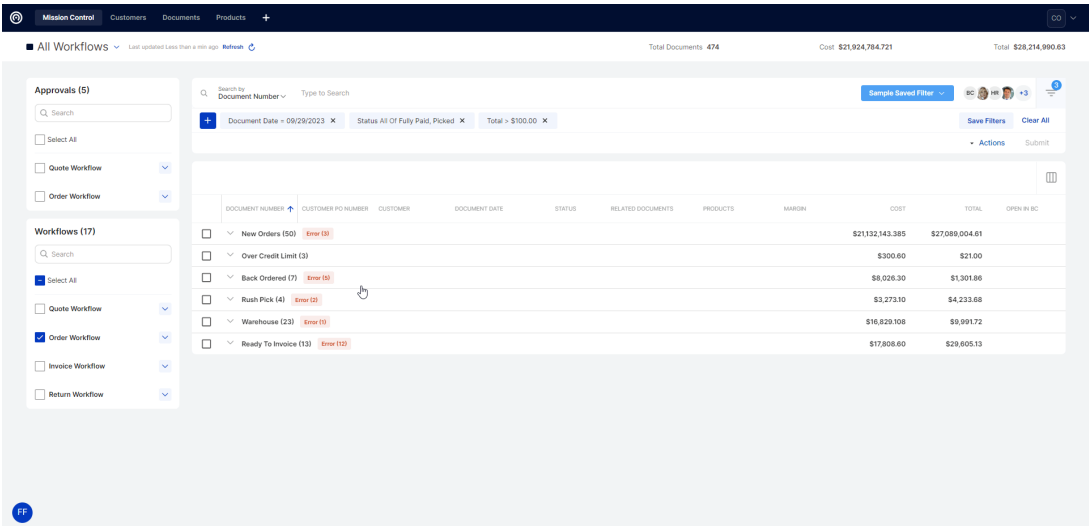
| | DOCUMENT NUMBER | CUSTOMER PO NUMBER | CUSTOMER | DOCUMENT DATE | STATUS | RELATED DOCUMENTS | PRODUCTS | MARGIN | COST | TOTAL | OPEN IN BC |
|--------------------------|-------------------|--------------------|--------------------|---------------|------------------|-------------------|----------|--------|------------------|-----------------|------------|
| <input type="checkbox"/> | ^ New Orders (50) | Error 131 | | | | | | | \$21,132,143.385 | \$27,089,004.61 | |
| <input type="checkbox"/> | S-ORD101652 | - | A Adatum Corporati | Jul 27, 2023 | Released | +1 | 02 | -4% | \$298.40 | \$286.50 | ff |
| <input type="checkbox"/> | S-ORD101653 | - | A Adatum Corporati | Jul 25, 2023 | Released | +1 | 02 | 22% | \$298.40 | \$382.90 | ff |
| <input type="checkbox"/> | S-ORD101654 | - | A Adatum Corporati | Jul 25, 2023 | No Products | | 00 | 0% | \$0.00 | \$0.00 | ff |
| <input type="checkbox"/> | S-ORD101655 | - | A Adatum Corporati | Jul 25, 2023 | Allocated | +1 | 01 | 22% | \$148.10 | \$190.10 | ff |
| <input type="checkbox"/> | S-ORD101656 | - | A Adatum Corporati | Jul 27, 2023 | Released | +2 | 01 | -133% | \$150.30 | \$10.50 | ff |
| <input type="checkbox"/> | S-ORD101657 | - | A Adatum Corporati | Jul 27, 2023 | Allocated | +1 | 01 | -133% | \$150.30 | \$10.50 | ff |
| <input type="checkbox"/> | S-ORD101666 | - | A Adatum Corporati | Aug 02, 2023 | Needs Payment... | | 01 | -133% | \$150.30 | \$10.50 | ff |
| <input type="checkbox"/> | S-ORD101676 | - | A Adatum Corporati | Aug 11, 2023 | No Products | | 00 | 0% | \$0.00 | \$0.00 | ff |
| <input type="checkbox"/> | S-ORD101679 | - | A Adatum Corporati | Aug 16, 2023 | Released | +5 | 63 | -1086% | \$1,621.235 | \$9.50 | ff |
| <input type="checkbox"/> | S-ORD101680 | - | A Adatum Corporati | Aug 16, 2023 | Released | +3 | 21 | -68% | \$1,172.92 | \$700.00 | ff |

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."

Mission Control Customers Documents Products +

■ All Workflows Last updated Less than a min ago Refresh

Total Documents 474 Cost \$21,924,784.721 Total \$28,214,990.63

Search by Document Number Type to Search

Save Filters Clear All

Actions Submit

| | DOCUMENT NUMBER | CUSTOMER PO NUMBER | CUSTOMER | DOCUMENT DATE | STATUS | RELATED DOCUMENTS | PRODUCTS | MARGIN | COST |
|--------------------------|-----------------------|--------------------|----------|---------------|--------|-------------------|----------|------------------|----------|
| <input type="checkbox"/> | New Orders (50) | Error (3) | | | | | | \$21,132,143.385 | \$27,086 |
| <input type="checkbox"/> | Over Credit Limit (3) | | | | | | | \$300.60 | |
| <input type="checkbox"/> | Back Ordered (7) | Error (3) | | | | | | \$8,026.30 | \$1 |
| <input type="checkbox"/> | Rush Pick (4) | Error (2) | | | | | | \$3,273.10 | \$4 |
| <input type="checkbox"/> | Warehouse (23) | Error (1) | | | | | | \$16,829.108 | \$1 |
| <input type="checkbox"/> | 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:

Mission Control Customers Documents Products +

■ All Workflows Last updated Less than a min ago Refresh

Total Documents 474 Cost \$21,924,784.721 Total \$28,214,990.63

Search by Document Number Type to Search

Save Filters Clear All

Actions Submit

| | DOCUMENT NUMBER | CUSTOMER PO NUMBER | CUSTOMER | DOCUMENT DATE | STATUS | RELATED DOCUMENTS | PRODUCTS | MARGIN | COST |
|--------------------------|-----------------------|--------------------|----------|---------------|--------|-------------------|----------|------------------|----------|
| <input type="checkbox"/> | New Orders (50) | Error (3) | | | | | | \$21,132,143.385 | \$27,086 |
| <input type="checkbox"/> | Over Credit Limit (3) | | | | | | | \$300.60 | |
| <input type="checkbox"/> | Back Ordered (7) | Error (3) | | | | | | \$8,026.30 | \$1 |
| <input type="checkbox"/> | Rush Pick (4) | Error (2) | | | | | | \$3,273.10 | \$4 |
| <input type="checkbox"/> | Warehouse (23) | Error (1) | | | | | | \$16,829.108 | \$1 |
| <input type="checkbox"/> | 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.