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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.

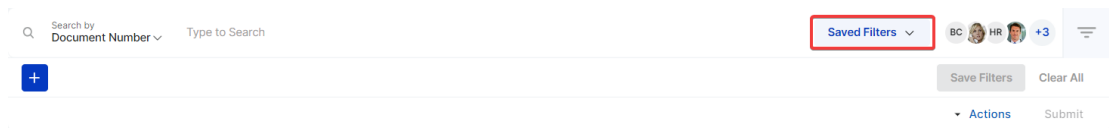
Accessing Filters

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.

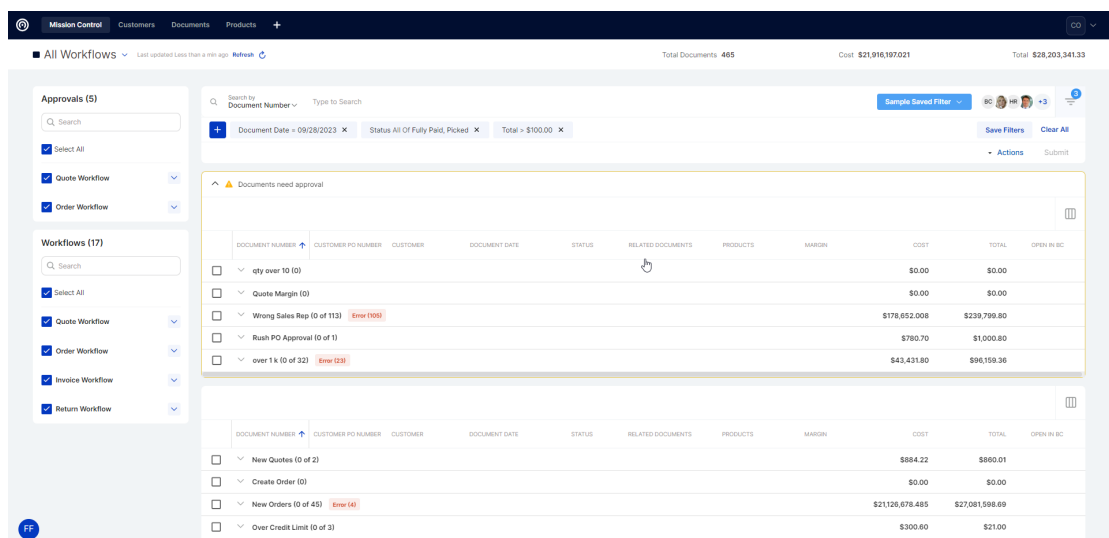


Saved Filters: A dropdown menu in the upper right of the screen containing all the users saved filter sets.



Filtering is available in the below areas of the application:

Mission Control



Document Search

Product Card

Mission Control

Customers

Documents

Products

+

GO

Products > ATHENS Desk

ATHENS Desk

Description

ATHENS Desk

Type

Inventory

Base UoM

PCS

Unit Price

1000.0

Unit Cost

780.7

Item Tracking

Replenishment

Open Documents (204)

Inventory

Archived Documents

Posted Invoices

Variants

Search by Document Number

Type to Search

Save Filters

1

+

Total > \$100.00

×

Save Filters

Clear All

Actions

Submit

	DOCUMENT NUMBER	CUSTOMER	DOCUMENT DATE	QUEUE	STATUS	MARGIN	COST	DOCUMENT TYPE	OPEN IN BC
<input type="checkbox"/>	S-INV102007	A Adatum Corporati 10000	Jan 24, 2021	New Invoice	Released	22%	\$8,559.30	Invoice	
<input type="checkbox"/>	S-INV102012	A School of Fine A 30000	Jan 30, 2021	New Invoice	Released	22%	\$8,335.40	Invoice	
<input type="checkbox"/>	S-INV102020	A Adatum Corporati 10000	Feb 22, 2021	New Invoice	Released	22%	\$10,120.70	Invoice	
<input type="checkbox"/>	S-INV102024	A School of Fine A 30000	Feb 26, 2021	New Invoice	Released	22%	\$8,559.10	Invoice	
<input type="checkbox"/>	S-INV102033	A Adatum Corporati 10000	Mar 24, 2021	New Invoice	Released	22%	\$13,229.30	Invoice	
<input type="checkbox"/>	S-INV102038	A School of Fine A 30000	Mar 30, 2021	New Invoice	Released	22%	\$12,216.10	Invoice	
<input type="checkbox"/>	S-INV102044	A Adatum Corporati 10000	Apr 22, 2021	New Invoice	Released	22%	\$15,542.20	Invoice	
<input type="checkbox"/>	S-INV102049	A School of Fine A 30000	Apr 26, 2021	New Invoice	Released	22%	\$11,033.20	Invoice	
<input type="checkbox"/>	S-INV102059	A Adatum Corporati 10000	May 24, 2021	New Invoice	Released	22%	\$12,139.40	Invoice	
<input type="checkbox"/>	S-INV102064	A School of Fine A 30000	May 30, 2021	New Invoice	Released	22%	\$11,285.10	Invoice	

204 Documents

\$151,537.47

Customer Card

Mission Control

Customers

Documents

Products

+

Customers > Adatum Corporation

New Document

A

Adatum Corporation

General Business Posting Group

DOMESTIC

Website

cavelfo.com

Tax Area

AVATAK

Currency

US dollar (\$)

Balance

\$62,245.51

Payment Terms

1M/BD

Payment Method

CARD

Address

Primary Address

2 Lanes Road
Atlanta, GA, 31772, US

Shipping Address

2 Lanes Road
Atlanta, GA, 31772, US

Open Documents (281)

Products

Posted Invoices

Archived Documents

Notes (13)

Addresses

Contacts

Wallet

About

Search by

Document Number

Type to Search

Saved Filters

+

Document Type is Order

×

Save Filters

Clear All

Actions

Submit

<input type="checkbox"/>	DOCUMENT NUMBER	DOCUMENT DATE	STATUS	MARGIN	COST	TOTAL	DOCUMENT TYPE	OPEN IN BC
<input type="checkbox"/>	S-ORD101013	Oct 14, 2022	Shipped +1	22%	\$780.70	\$1,060.85	Order	🔗
<input type="checkbox"/>	S-ORD101017	Oct 14, 2022	Partially... +2	10%	\$931.00	\$1,101.17	Order	🔗
<input type="checkbox"/>	S-ORD101023	Oct 14, 2022	Released +4	22%	\$780.70	\$1,060.85	Order	🔗
<input type="checkbox"/>	S-ORD101025	Sep 19, 2023	Released +3	22%	\$1,269.20	\$1,724.83	Order	🔗
<input type="checkbox"/>	S-ORD101026	Oct 14, 2022	Partially... +2	22%	\$3,903.50	\$5,004.00	Order	🔗
<input type="checkbox"/>	S-ORD101031	Oct 14, 2022	Released +2	22%	\$780.70	\$1,060.85	Order	🔗
<input type="checkbox"/>	S-ORD101041	Sep 19, 2023	Released +4	22%	\$780.70	\$1,060.85	Order	🔗
<input type="checkbox"/>	S-ORD101071	Oct 27, 2022	Pending Prc. +3	22%	\$780.70	\$1,060.85	Order	🔗
<input type="checkbox"/>	S-ORD101072	Oct 31, 2022	Pending Prc. +3	22%	\$931.00	\$1,265.22	Order	🔗
<input type="checkbox"/>	S-ORD101073	Nov 01, 2022	Pending Prc. +3	22%	\$2,342.10	\$3,182.54	Order	🔗

Rows per page: 10

1 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.

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: 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
city over 10 (0)								\$0.00	\$0.00	
Quote Margin (0)								\$0.00	\$0.00	
Wrong Sales Rep (115)				Error 1007				\$180,213.408	\$241,961.52	
Rush PO Approval (1)								\$780.70	\$1,000.80	
over 1k (32)				Error 128				\$43,431.80	\$96,158.36	

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)

Q Search

Select All

Quote Workflow

Order Workflow

Workflows (17)

Q Search

Select All

Quote Workflow

Order Workflow

Invoice Workflow

Return Workflow

Q Search by Document Number

Type to Search

Save 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 10000	Jul 27, 2023	Released	+1	0	2	-4%	\$286.40	\$286.50	ff
<input type="checkbox"/>	S-ORD101653	-	A Adatum Corporati 10000	Jul 25, 2023	Released	+1	0	2	22%	\$286.40	\$382.90	ff
<input type="checkbox"/>	S-ORD101654	-	A Adatum Corporati 10000	Jul 25, 2023	No Products		0	0	0%	\$0.00	\$0.00	ff
<input type="checkbox"/>	S-ORD101655	-	A Adatum Corporati 10000	Jul 25, 2023	Allocated	+1	0	1	22%	\$148.10	\$190.10	ff
<input type="checkbox"/>	S-ORD101656	-	A Adatum Corporati 10000	Jul 27, 2023	Released	+2	0	1	-1331%	\$150.30	\$10.50	ff
<input type="checkbox"/>	S-ORD101657	-	A Adatum Corporati 10000	Jul 27, 2023	Allocated	+1	0	1	-1331%	\$150.30	\$10.50	ff
<input type="checkbox"/>	S-ORD101666	-	A Adatum Corporati 10000	Aug 02, 2023	Needs Paymen...		0	1	-1331%	\$150.30	\$10.50	ff
<input type="checkbox"/>	S-ORD101676	-	A Adatum Corporati 10000	Aug 11, 2023	No Products		0	0	0%	\$0.00	\$0.00	ff
<input type="checkbox"/>	S-ORD101679	-	A Adatum Corporati 10000	Aug 16, 2023	Released	+5	8	3	-10000%	\$1,621.235	\$9.50	ff
<input type="checkbox"/>	S-ORD101680	-	A Adatum Corporati 10000	Aug 16, 2023	Released	+3	2	1	-48%	\$1,172.92	\$700.00	ff

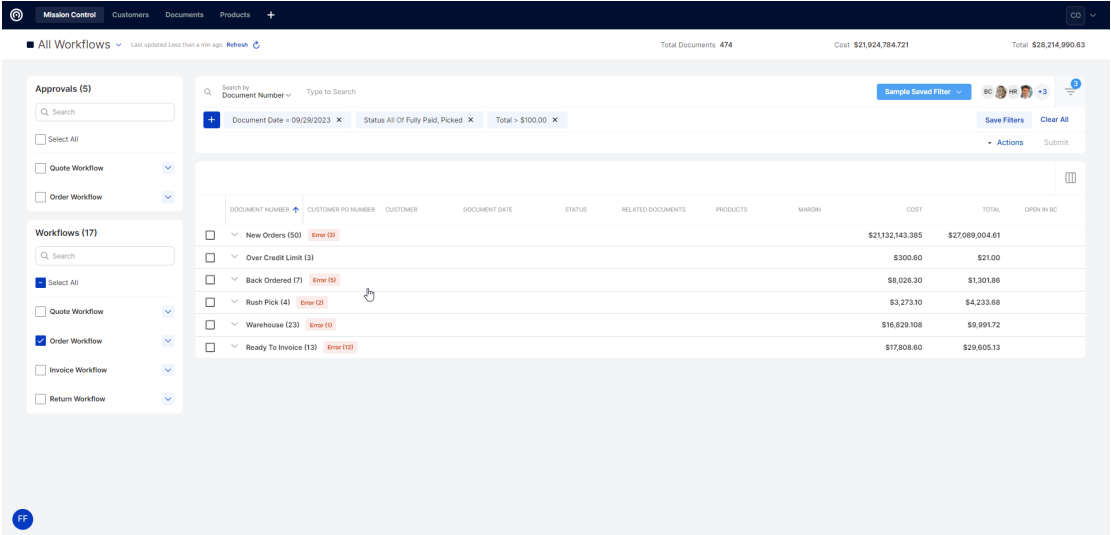
Enabling a Saved Filter

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."

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:

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.