



Mission Control: Grid Controls

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

Tables are a key part of Cavallo's user experience, and understanding all of their functionality can enable users to use their data to their fullest. The following document will cover some common table functionality inside of Cavallo.

Cavallo Table Functionality

The below sections go into detail around each of the unique functions in our tables. It is worth noting that although one screen is used in the examples, all of the tables within the application mirror this functionality.

Table Visualization

Cavallo's tables combine key components to enable users to take actions at any point in their process. Alongside an intuitive user interface, the tables include checkboxes for [bulk actions](#), filtering including [saved filters](#) and an "Open in BC" column for quick navigation to the corresponding page in Business Central. Here's an overview of the table structure:

Doc Number	CUSTOMER	DOC DATE	QUEUE	STATUS	RELATED DOCS	PRODUCTS	MARGIN	COST	TOTAL	SUBTOTAL	OPEN IN BC
S-INV102001	Trey Research	Jan 19, 2021	New Invoice	0	1	22%	\$128.40	\$172.84	\$164.70		
S-INV102002	Adatum Corporati	Jan 20, 2021	New Invoice	0	1	22%	\$601.20	\$817.47	\$771.20		
S-INV102003	School of Fine A	Jan 21, 2021	New Invoice	0	1	22%	\$150.30	\$206.30	\$192.80		
S-INV102004	Relectcloud	Jan 22, 2021	New Invoice	0	1	22%	\$296.20	\$403.01	\$380.20		
S-INV102005	Alpine Ski House	Jan 23, 2021	New Invoice	0	1	22%	\$300.60	\$412.59	\$385.60		
S-INV102006	Trey Research	Jan 24, 2021	New Invoice	0	3	22%	\$1,797.00	\$2,420.78	\$2,305.50		
S-INV102007	Adatum Corporati	Jan 24, 2021	New Invoice	0	3	22%	\$8,559.30	\$11,631.80	\$10,973.40		
S-INV102008	Relectcloud	Jan 26, 2021	New Invoice	0	1	22%	\$2,029.20	\$2,757.70	\$2,601.60		
S-INV102009	School of Fine A	Jan 27, 2021	New Invoice	0	1	22%	\$299.60	\$411.20	\$384.30		
S-INV102010	Alpine Ski House	Jan 27, 2021	New Invoice	0	4	22%	\$2,997.20	\$4,113.51	\$3,844.40		

Column Chooser

The column chooser allows users to decide which data they would like to view within any of the screens in Cavallo. Each screen will have unique options based on the business object and any custom fields that may have been added. Simply check a field to add it to the grid and deselect to remove. Fields are added in the order they appear in the chooser and can be moved via click and drag functionality. To reset the grid to Cavallo's default view, uncheck all the columns as seen in the walkthrough below:

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Search by
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<input type="checkbox"/>	DOC NUMBER	CUSTOMER	DOC DATE	QUEUE	STATUS	RELATED DOCS	PRODUCTS	MARGIN	COST	TOTAL	SUBTOTAL	OPEN IN BC	Actions
<input type="checkbox"/>	S-INV102001	Trey Research	Jan 19, 2021	New Invoice		0	1	22%	\$128.40	\$172.94	\$164.70		
<input type="checkbox"/>	S-INV102002	Adatum Corporati	Jan 20, 2021	New Invoice		0	1	22%	\$601.20	\$817.47	\$771.20		
<input type="checkbox"/>	S-INV102003	School of Fine A	Jan 21, 2021	New Invoice		0	1	22%	\$150.30	\$206.30	\$192.80		
<input type="checkbox"/>	S-INV102004	Relectcloud	Jan 22, 2021	New Invoice		0	1	22%	\$296.20	\$403.01	\$380.20		
<input type="checkbox"/>	S-INV102005	Alpine Ski House	Jan 23, 2021	New Invoice		0	1	22%	\$300.60	\$412.59	\$385.60		
<input type="checkbox"/>	S-INV102006	Trey Research	Jan 24, 2021	New Invoice		0	3	22%	\$1,797.00	\$2,420.78	\$2,305.50		
<input type="checkbox"/>	S-INV102007	Adatum Corporati	Jan 24, 2021	New Invoice		0	3	22%	\$8,559.30	\$11,631.80	\$10,973.40		
<input type="checkbox"/>	S-INV102008	Relectcloud	Jan 26, 2021	New Invoice		0	1	22%	\$2,029.20	\$2,757.70	\$2,601.60		
<input type="checkbox"/>	S-INV102009	School of Fine A	Jan 27, 2021	New Invoice		0	1	22%	\$299.60	\$411.20	\$384.30		
<input type="checkbox"/>	S-INV102010	Alpine Ski House	Jan 27, 2021	New Invoice		0	4	22%	\$2,997.20	\$4,113.51	\$3,844.40		

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Column Functions

As previously stated, each set of tables includes a column chooser. After these columns are added to the grid, Cavallo enables users to customize their screen based on their requirements. Users can easily rearrange columns through click-and-drag, adjust column sizes, and sort various data sets, ensuring that the grid functions optimally for their purposes.

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Search by
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<input type="checkbox"/>	DOC NUMBER	CUSTOMER	DOC DATE	RELATED DOCS	STATUS	QUEUE	PRODUCTS	MARGIN	COST	TOTAL	SUBTOTAL	OPEN IN BC	Actions
<input type="checkbox"/>	S-INV102001	Trey Research	Jan 19, 2021	0		New Invoice	1	22%	\$128.40	\$172.94	\$164.70		
<input type="checkbox"/>	S-INV102002	Adatum Corporati	Jan 20, 2021	0		New Invoice	1	22%	\$601.20	\$817.47	\$771.20		
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<input type="checkbox"/>	S-INV102009	School of Fine A	Jan 27, 2021	0		New Invoice	1	22%	\$299.60	\$411.20	\$384.30		
<input type="checkbox"/>	S-INV102010	Alpine Ski House	Jan 27, 2021	0		New Invoice	4	22%	\$2,997.20	\$4,113.51	\$3,844.40		

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Pagination

Finally, every grid within the software will incorporate pagination features. This encompasses the capability to increase the number of rows displayed per page and the option to navigate through different result pages.

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New Document

Search by Doc NumberType to Search

	DOC NUMBER	CUSTOMER	DOC DATE	MARGIN	RELATED DOCS	STATUS	QUEUE	PRODUCTS	COST	TOTAL	SUBTOTAL	OPEN IN BC	Actions	Submit
<input type="checkbox"/>	S-QUO1041	A Adatum Corporati10000	Jul 27, 2023	22%	0		New Quotes	1	\$150.30	\$192.80	\$192.80			
<input type="checkbox"/>	S-QUO1044	A Adatum Corporati10000	Aug 16, 2023	-10%	0		New Quotes	2	\$733.92	\$667.21	\$667.21			
<input type="checkbox"/>	S-ORD101005	School of Fine A35000	Jul 19, 2023	22%	2	Released	+3 over 1k	4	\$2,492.40	\$3,418.86	\$3,195.20			
<input type="checkbox"/>	S-ORD101013	A Adatum Corporati10000	Oct 14, 2022	22%	1	Shipped	+1 over 1k	1	\$780.70	\$1,060.85	\$1,000.80			
<input type="checkbox"/>	S-ORD101017	A Adatum Corporati10000	Oct 14, 2022	10%	1	Partially...	+1 Rush Pick	2	\$931.00	\$1,301.17	\$1,093.52			
<input type="checkbox"/>	S-ORD101023	A Adatum Corporati10000	Oct 14, 2022	22%	2	Allocated	+3 Rush Pick	1	\$780.70	\$1,060.85	\$1,000.80			
<input type="checkbox"/>	S-ORD101025	A Adatum Corporati10000	Oct 14, 2022	22%	3	Allocated	+2 Over Credit Limit	3	\$1,269.20	\$1,724.83	\$1,627.20			
<input type="checkbox"/>	S-ORD101026	A Adatum Corporati10000	Oct 14, 2022	22%	2	Partially...	+3 Over Credit Limit	3	\$3,903.50	\$5,004.00	\$5,004.00			
<input type="checkbox"/>	S-ORD101031	A Adatum Corporati10000	Oct 14, 2022	22%	1	Released	+2 over 1k	1	\$780.70	\$1,060.85	\$1,000.80			
<input type="checkbox"/>	S-ORD101041	A Adatum Corporati10000	Oct 19, 2022	22%	2	Released	+4 Over Credit Limit	1	\$780.70	\$1,060.85	\$1,000.80			

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