

# About Grids

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## Overview

In serviceminder, a **Grid** refers to an interactive list or spreadsheet. These are pages that can contain vast amounts of data but deliver it in ways that make it easy to search, filter, and perform an action such as sending an email campaign or removing a tag.

The image below shows the Proposal Grid.

Proposals

Filter

All

Won

Open

Accepted

Unscheduled

Projects

Actions

25

Page 1 of 1 (6 items)

< 1 of 1 >

Date	Status	Name	Service	Subtotal	Tax	Total	Accepted Date	Options	Title	Visits	Duration	Value	Deposit	Progress %	Invoice	Actions
7/19/2024	Open	Dracula 1 (old)	Ghost Removal	\$500.00	\$0.00	\$500.00			Ghost Removal		30 mins	\$500.00	\$0.00			<a href="#">Q</a>   <a href="#">Edit</a>   <a href="#">Schedule</a>   <a href="#">Print</a>
7/19/2024	Open	Dracula 1 (old)	Ghost Removal	\$500.00	\$0.00	\$500.00			Ghost Removal		30 mins	\$500.00	\$0.00			<a href="#">Q</a>   <a href="#">Edit</a>   <a href="#">Schedule</a>   <a href="#">Print</a>
7/2/2024	Open	Ned Neighborly	Monster Slaying	\$1,185.00	\$0.00	\$1,185.00			Vampire		30 mins	\$1,185.00	\$0.00			<a href="#">Q</a>   <a href="#">Edit</a>   <a href="#">Schedule</a>   <a href="#">Print</a>
5/31/2024	Open	Fred the Gardener	Honeybadger Removal	\$260.00	\$0.00	\$260.00		5 Year Warranty	Ghost Removal		30 mins	\$260.00	\$0.00			<a href="#">Q</a>   <a href="#">Edit</a>   <a href="#">Schedule</a>   <a href="#">Print</a>
5/3/2024	Open	Fred the Gardener	Honeybadger Removal	\$260.00	\$0.00	\$260.00			Honeybadger Removal		30 mins	\$260.00	\$0.00			<a href="#">Q</a>   <a href="#">Edit</a>   <a href="#">Schedule</a>   <a href="#">Print</a>
5/3/2024	Open	Molly Baker	Honeybadger Removal	\$260.00	\$0.00	\$260.00			Honeybadger Removal		30 mins	\$260.00	\$0.00			<a href="#">Q</a>   <a href="#">Edit</a>   <a href="#">Schedule</a>   <a href="#">Print</a>
				\$2,965.00								\$2,965.00				

Create Filter

Views

Default

view name...

Save



All of the grids have some common, basic capabilities. Many of the specialized grids also have more extensive filtering and searching capabilities.

There are several pages that contain Grids. The four most used are:

1. Contacts Grid
2. Appointments Grid
3. Proposal Grid
4. Invoice Grid

This article will cover all the things you can do with any grid.

## Settings and Navigation

Navigating to the different grid pages are as follows:

- Contacts and Appointments grids - located in the top blue menu
- Proposal and Invoices grids - located in the side panel under Snapshots

Each grid has corresponding Permissions for Users. You can **Grant** or **Deny** a User these permissions by going to **Control Panel > Users > Edit > select the Permissions tab**.

Appointments:Grid:All	<input checked="" type="radio"/> Grant	<input type="radio"/> Deny
Appointments:Grid:Backlog	<input checked="" type="radio"/> Grant	<input type="radio"/> Deny
Appointments:Grid:InProgress	<input checked="" type="radio"/> Grant	<input type="radio"/> Deny
Appointments:Grid:Last	<input checked="" type="radio"/> Grant	<input type="radio"/> Deny
Appointments:Grid:Reworks	<input checked="" type="radio"/> Grant	<input type="radio"/> Deny
Appointments:Grid:Upcoming	<input checked="" type="radio"/> Grant	<input type="radio"/> Deny

This example shows the permissions for the Appointments Grid.

## Sorting Grid Columns

You can change the order of the columns by clicking on the header and dragging the column to the new position. Arrow markers will display between the two columns where the column you are dragging will be moved to. You can also change the width of the columns by clicking on the divider line between two columns and dragging left or right to change the width of the column to the left.

Contacts					
25 ▾					
Name	Phone	Email	Service Address	City	State
<a href="#">Bobby Booter</a>	(000) 000-0000 (Home)		516 6th St	Saint Albans	WV
<a href="#">Dracula 1 (old)</a>	(000) 000-0000 (Mobile)		Green Monster Lane	Pence Springs	WV
<a href="#">Fred the Gardener</a>	(000) 000-0000		815 Cunningham Ln	Saint Albans	WV
<a href="#">Holly Helper</a>	(000) 000-0000		Saint Albans Loop Tacketts Creek	Saint Albans	WV
<a href="#">Kendall the Golfer</a>	(000) 000-0000		99 Fairway Dr	Charleston	WV
<a href="#">Molly Baker</a>	(000) 000-0000	heatherg@serviceminder.com	2308 Cleveland Ave	Saint Albans	WV

## Drag and Drop

You can change the order of the columns by clicking on the header and dragging the column to the new position. Arrow markers will display between the two columns where the column you are dragging will be moved to. You can also drag and drop column headers to resort the grid to your preferences. You can also change the width of the columns by clicking on the divider line between two columns and dragging left or right to change the width of the column to the left.

## Alphabetical Order

All grids have a default sort order, typically the Name or a pertinent date column. You can sort by a different column by clicking on the column header. Clicking once will sort the column in ascending order. Clicking a second time will sort descending. A small arrow indicator will be displayed in the header to indicate the sort order.

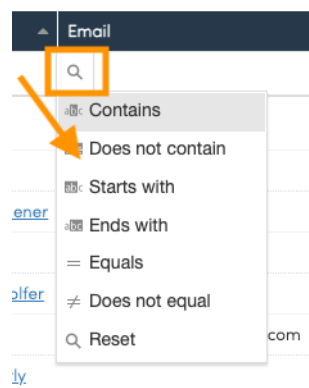
Proposals				
25 ▾				
Date	Status	Name	Service	
🔍	📅	🔍	🔍	🔍
<a href="#">7/19/2024</a>	Open	<a href="#">Dracula 1 (old)</a>	<a href="#">Ghost Removal</a>	
<a href="#">7/19/2024</a>	Open	<a href="#">Dracula 1 (old)</a>	<a href="#">Ghost Removal</a>	
<a href="#">5/3/2024</a>	Open	<a href="#">Fred the Gardener</a>	<a href="#">Honeybadger Removal</a>	
<a href="#">5/3/2024</a>	Open	<a href="#">Molly Baker</a>	<a href="#">Honeybadger Removal</a>	
<a href="#">5/31/2024</a>	Open	<a href="#">Fred the Gardener</a>	<a href="#">Honeybadger Removal</a>	
<a href="#">7/2/2024</a>	Open	<a href="#">Ned Neighborly</a>	<a href="#">Monster Slaying</a>	

## Fix Columns

Right click on the column header to see the "Fix" option appear. Hover over it to see the secondary options of "Left" or "Right". This means you can freeze the columns at the left-hand side or the right-hand side of the grid.

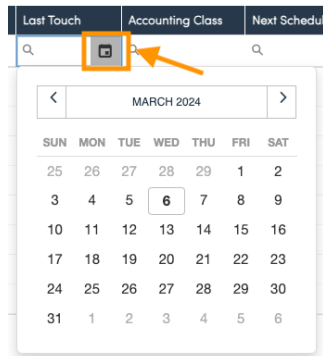
## Search Icon

Clicking on the magnifying glass displays additional filtering options. Or you can click into the search box next to the icon and just start typing and the tool will help you find what you're looking for.



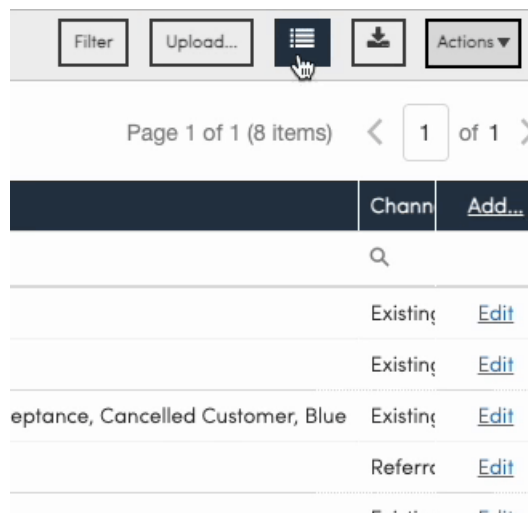
## Calendar Icon

Clicking on the calendar icon lets you filter by a certain date range.



## Column Chooser

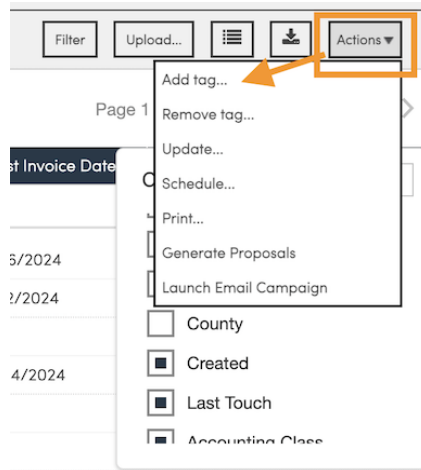
In the top-right corner of the page, there are buttons for various actions. To get started, organize the columns the way you would like. Click the **Column Chooser** button and select the fields that are most helpful, but you can change this at any time. Your "Default" view will be remembered.



When you select or deselect options, the Grid will automatically update.

## Actions

The **Action** button allows you more options like Tagging Contacts or Removing Tags. Depending on which grid page you are on, the type of actions you can perform may be different than what is shown on this example image.

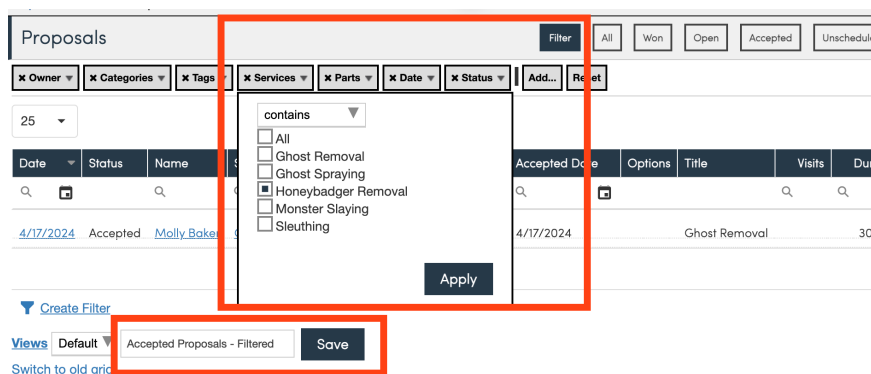


For instance, on the Contacts grid you can:

- The **Add tag...** option enables you to add tags to all contacts in the result set (meaning that contacts that you've filtered out are not affected).
- The **Remove tag...** option has the inverse functionality of *Add tag...*
- The **Launch Email Campaign** option allows you to create an email campaign with all contacts in the result set targeted.
- The **Generate Proposals** option allows you to send proposals to all contacts in the result set.

## Saving Views

Create a shortcut for a grid that you've organized with specific views. All grids have the option to save "Custom Views" and also to update, by user, the "Default View" so a user or a team can easily access the grid information they find most important.



You can create and save as many Views as you would like for Proposals, Contacts, Invoices, and Appointments. Wherever you see the blue Views link, you can use this functionality.

Proposals

Filter

All

Won

Open

Accepted

Unscheduled

Projects

Actions

Owner

Categories

Tags

Services

Parts

Date

Status

Add

Reset

25

Page 1 of 1 (4 items)

1

Date	Status	Name	Service	Subtotal	Tax	Total	Accepted Date	Options	Title	Visits	Duration	Value	Actions
7/19/2024	Open	Dracula I (old)	Ghost Removal	\$500.00	\$0.00	\$500.00			Ghost Removal		30 mins	\$500.00	<a href="#">Q</a>   <a href="#">Edit</a>   <a href="#">Schedule</a>   <a href="#">Print</a>
7/19/2024	Open	Dracula I (old)	Ghost Removal	\$500.00	\$0.00	\$500.00			Ghost Removal		30 mins	\$500.00	<a href="#">Q</a>   <a href="#">Edit</a>   <a href="#">Schedule</a>   <a href="#">Print</a>
7/2/2024	Open	Ned Neighbourly	Monster Slaying	\$1185.00	\$0.00	\$1185.00			Vampire		30 mins	\$1185.00	<a href="#">Q</a>   <a href="#">Edit</a>   <a href="#">Schedule</a>   <a href="#">Print</a>
5/31/2024	Open	Fred the Gardener	Honeybadger Removal	\$260.00	\$0.00	\$260.00	5 Year Warranty		Ghost Removal		30 mins	\$260.00	<a href="#">Q</a>   <a href="#">Edit</a>   <a href="#">Schedule</a>   <a href="#">Print</a>
												\$2,445.00	
												\$2,445.00	

Create Filter

Views

Default

view name...

Save

You can even Save these views in your Navigation panel for easy access. Click on **Views** and check the **Shortcut** box.

Manage Views for Proposals			
Action	Name	Shared	Shortcut
<a href="#">Reset</a>	<a href="#">Default</a>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Rename   Delete</a>	<a href="#">Delayed Acceptance</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Rename   Delete</a>	<a href="#">Open Proposals</a>	<input type="checkbox"/>	<input type="checkbox"/>

Then it will appear in your Shortcuts section.

Shortcuts
<a href="#">Add a Contact</a>
<a href="#">Schedule an Appointment</a>
<a href="#">My Schedule</a>
<a href="#">Backlog</a>
<a href="#">Delayed Acceptance</a>
<a href="#">Texting</a>

## FAQs

### Is there a way to display contacts in alphabetical order?

If you click on the column header "Name", it should sort by alphabetical order by ascending. If you click it a second time it will sort by descending. The arrow indicator on the right side of the column will indicate which setting it is on (up or down arrow).

### Do custom fields show?

Yes, if you have custom fields attached to your Contacts, they can be displayed on this grid to assist with adding tags, emailing, or sending proposals.

## **When I use filters, will this page remember my settings if I exit the Contacts Grid?**

For the top filtering options, yes, the Contacts Grid will remember your prior settings. However, there is a better way of making sure that your specific views are saved. If you look at the bottom of the screen under the Contacts Grid, you will see options for “Views”. You can specifically organize everything the way you want it and save it as a “View”. You can also edit the “Default” view.

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