# **About Grids**

05/16/2025 9:14 am CDT

## Overview

In ServiceMinder, a **Grid** refers to an interactive, spreadsheet-style list used to display and manage large sets of data. Grids allow you to quickly sort, filter, and take action on items—such as launching an email campaign, tagging contacts, or generating proposals.

You'll find Grids across many parts of the system, but these are the most frequently used:

- Contacts Grid
- Appointments Grid
- Proposals Grid
- Invoices Grid

All grids share a set of core features for customization, filtering, and bulk actions. This guide walks through the common tools available across all grids, so you can work more efficiently.

#### This article will review:

- Settings and Navigation
- Universal Grid Features
- Actions Menu
- Saving Views
- FAQs

### **Settings and Navigation**

The Contacts and Appointments grids can be accessed directly from the top navigation bar.



The Snapshots section of the left-side navigation menu will take you to filtered versions of the **Appointments**, **Proposals** and **Invoices** grids.

Snapshots					
Pulse					
At a Glance					
Open Invoices	35				
Unapproved Invo	bices 4				
Projects	31				
Accepted Propos	als 8				
Open Proposals 0					
Backlog \$1,000 / 2					
Expiring Service	3				

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. This is an example of the available permissions for the Appointments Grid.

-	-
Grant	<ul> <li>Deny</li> </ul>
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# **Universal Grid Features**

### **Column Customization**

- Drag & Drop: Rearrange columns by dragging headers to your preferred position.
- Resize Columns: Hover between columns and drag left or right to adjust width.
- **Fix Columns**: Right-click on a column header to "Fix" it to the left or right side of the grid—ideal for keeping key info visible while scrolling.

Contac	ts									Fil	ter Upload		*	Actions ¥
50 •											Page 1 of 1	(37 items)	< 1	of 1 >
Add	Name 🗕	Phone	Email	Service Address	City	State	Zip	Community	Category	Та	Channel	Campaign	API	Key Ov
	Q	Q	=	Q,	Q	Q,	Q	Q	Q,		Q		Q	Q
Edit	Albert Einstein	(000) 00	eequalsmcquared	4613 Some St	Brem	WA	98		Prospect		Referral		Onli	ne _
Edit	Anna Arendelle	(123) 123-1	annawaitwhat@are	211 Bella Cima	Austin	TX	78	Costa Bella	Customer		Referral			
Edit	Arthur Dent	(333) 333	arthurd@hitchhiker	5836 Westslo	Austin	TX	78	Cat Mount	Customer		Internet			
Edit	Barb Dwyer	(444) 444	barbara@fakeemail	1640 Riversid	Austin	TX	787	East River	Customer		Referral			
Edit	Bella Notte	(888) 888	beautifulnight@fak	4222 Clinton	Austin	TX	78	Downtow	Customer	Ex	Referral			
Edit	Billy Kidd	(987) 654	billythekidd@testin	11813 Shimmer	Austin	TX	787	Onion Cre	Customer		Referral			
< Edit	Bob Geiger	(000) 00	kamerona@service_	1648 Some St.	Plano	TX	75		Customer		Referral		Onli	ne _
Edit	Bob Smith	(222) 333	anotherfakeemail@	7213 Poulain Dr	Austin	TX	78		Customer	Ex	Referral			Kat
Edit	Brighton Early	(999) 999	brightonearly@fake	17 Cherry Tree	Austin	TX	123		Customer		Referral			
Edit	Brooke Trout	(656) 565	brooketrout@fakee	186 Fleet Street	Austin	TX	787	Bauerle R	Customer		Referral			
Edit	Butch Cassidy	(123) 456	butchcassidy@testi	108 Piazza Vet	Austin	TX	78	Bella Mont	Prospect		Referral			
Edit	Carrie Bradshaw	(555) 555	sexandthecity@bra	24522 E Davi	Aurora	co	80	Tallyn's Re	Customer	Bl	Internet			

### **Column Sorting**

- Click any column header to sort:
  - First click = ascending order
  - Second click = descending order
  - Right click = choose sort order
- A small arrow in the column header shows the sort direction.

Invoices									Filter	Open	Paid Unapproved	) 🔳 🛓	Action	ŧΨ
25 •											Page 1 of 2 (2	?7 items) <	1 of 2	>
	Number	Date	Age (D	Status	Service		Sybtotal	Total	Balance Due	Date Paid	Name	Address	City	Zip
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Pay   Resend	138621	10/3/2	190	Open	Initial Service (one time)		\$408.00	\$408.00	\$208.00		Dennis Mitchell	2251 Pine	Aus	78
Pay   Resend	13862149	10/7/2	186	Open	Test Service		\$1,000.00	\$1,000.00	\$500.00		Bella Notte	4222 Clint	Aus	78
Pay   Resend	138621	10/22/	171	Open	Test Service		\$4,257.00	\$4,257.00	\$4,257.00		Justin Thyme	221 Baker	Aus	78
Pay   Resend	138621	10/29/	164	Open	Test Service		\$4,257.00	\$4,257.00	\$4,257.00		Justin Thyme	221 Baker	Aus	78
Pay   Resend	<u>138621</u>	2/21/2_	49	Open	Step 1		\$400.00	\$400.00	\$200.00		Jane Doe	7213 Jume	Aus	78
Pay   Resend	138621	2/25/2_	45	Open	Test Service		\$51.78	\$51.78	\$51.78		Brooke Trout	186 Fleet S	Aus	78
2ay   Resend	138621	2/25/2_	45	Open	Test Service		\$1,000.00	\$1,000.00	\$1,000.00		Fred Rogers	4802 E 5t	Aus	78
	138621	3/11/20_	31	Open	Test Service		(\$100.00)	(\$100.00)	(\$100.00)		Fred Rogers	4802 E 5t	Aus	78
Pay   Resend	BI01236	3/20/2	22	Open	Test Service		\$1,000.00	\$1,000.00	\$1,000.00		Elsa Arendelle	110 Sender	Lak	78
Pay   Resend	BIO1237	3/27/2	15	Open	Test Service		\$700.00	\$700.00	\$700.00		Fred Rogers	4802 E 5t	Aus	78
Pay   Resend	BI01238	4/2/20	9	Open	Test Service		\$900.00	\$900.00	\$900.00		Bob Smith	7213 Poulai	Aus	78
Pay   Resend	BI01239	4/2/20	9	Open	Test Service		\$1,000.00	\$1,000.00	\$1,000.00		Bob Smith	7213 Poulai	Aus	78

### **Filtering Options**

- Search Bar: Any column that has a magnifying glass icon below the header has search capabilities. Start typing in the search field to filter results quickly.
- Magnifying Glass: Click directly on the magnifying glass to open advanced filtering (options vary by column).
- Calendar Icon: Filter the Date column by a specific date range by clicking on the calendar icon.

25 -										Page 1 of 1 (8 ite	ims) <	1 of 1 >
Actions	Date -	Status	Name	Service	Subtotal	Тах	Total	Accepted Date	Options	Title	Visits	Dur
	۹ 🖬		Q,	Q.	>	Q,	Q	۹ 🖬		Q	Q,	Q
Q   Edit   Schedule   Print	4/9/2025	Open	Gale Forcewind	Test Service	\$1,000.00	\$86.30	\$1,086.30			Perfect Proposal		1 hour 30
Q   Edit   Schedule   Print	3/3/2025	Open	Fred Rogers	Test Service	\$700.00	\$60.41	\$760.41		Option A	Portfolio Demo Proposal		1 hour 20 i
Q   Edit   Schedule   Print	2/13/2025	Open	Brooke Trout	Test Service	\$1,275.00	\$0.00	\$1,275.00			Example Template		1 hour 50 i
Q   Edit   Schedule   Print	2/13/2025	Open	Justin Thyme	Test Service	\$1,275.00	\$51.00	\$1,326.00			Example Template		1 hour 50 i
Q   Edit   Schedule   Print	2/13/2025	Open	Brooke Trout	Test Service	\$1,275.00	\$0.00	\$1,275.00			Example Template		1 hour 50 r
Q   Edit   Schedule   Print	2/13/2025	Open	Stacey Fakename	Test Service	\$1,275.00	\$0.00	\$1,275.00			Example Template		1 hour 50
Q   Edit   Schedule   Print	2/13/2025	Open	Anna Arendelle	Test Service	\$700.00	\$0.00	\$700.00		TEST OPTIO_			1 hour 20 i
Q   Edit   Schedule   Print	2/13/2025	Open	Ken Tucky	Test Service	\$600.00	\$0.00	\$600.00			Example Template		1
					\$8,100.00							

- Filter Builder: Click the Filter button at the top of the page to build a custom combination of filters.
  - To add more terms, click **Add** and choose from the dropdown list of terms. Click the **X** on the term to remove it from the set.

Appoint	ments					Filter Al U	pcoming	Progress	Last Backlog	Actions 🔻
25 •								P	age 1 of 10 (244 items)	< 1 of 10 >
Actions	Scheduled Start	Status	Tentative	First Available?	Duration	Service	Total	Invoice	Name	Address
	۵. 🖬		(All) 👻	(All) -	Q	Q.	Q,	Q	Q	
Edit	a 2/29/2024 8:00a	Completed			8 hours / Man: 8 hours	Installation	\$0.00		Stacey Fakename	5678 Main Street
Edit	■ <u>3/1/2024 8:00a</u>	Completed			30 mins	Monthly Maintenance	\$405.00	138622	Barb Dwyer	1640 Riverside Drive
Edit	3/14/2024 8:00a	Completed			30 mins	Monthly Maintenance	\$0.00	138623	Stacey Fakename	5678 Main Street
Edit	■.3/15/2024 6:00a	Completed			30 mins	Monthly Maintenance	\$450.00		John Doe	1234 Easy Street
Edit	3/22/2024 8:00a	Completed			4 hours	Repair Service	\$0.00		D.S. Example	1234 Main Street
Edit	■ <u>3/22/2024 12:00p</u>	Completed			30 mins	Repair Service	\$0.00		D.S. Example	1234 Main Street
C Edit	3/23/2024 8:00a	Completed			4 hours	Repair Service	\$350.00	138624	D.S. Example	1234 Main Street
Edit	3/23/2024 12:00p	Completed			30 mins	Repair Service	\$350.00	138627	D.S. Example	1234 Main Street
Edit	■.3/26/2024 9:00a	Completed			8 hours / Man: 8 hours	Bathroom Install	\$520.00	1386210	John Doe	1234 Easy Street
Edit	<b>3/27/2024 8:00a</b>	Completed			30 mins	Test Service	\$0.00	138628	Stacey Fakename	5678 Main Street
Edit	3/27/2024 8:00a	Completed			30 mins	Test Service	\$0.00	138629	Barb Dwyer	1640 Riverside Drive
Edit	4/3/2024 6:00a	Completed			30 mins	Monthly Maintenance	\$450.00		Barb Dwyer	1640 Riverside Drive



Each filter condition is combined using **AND** logic, meaning all conditions must be true. However, within a checkbox list (like Tags or Services), multiple selections use **'any of'** or **'none of'** logic—returning results that match at least one (or exclude all) of the selected options

- Custom Filters: Some grids offer a Create Filter link at the bottom for compound filtering:
  - Use the + icon to add multiple conditions
  - Define comparisons like equal, greater than, between, etc.
  - Enter specific values and apply

Filter Builder	×
And	
	OK Cancel

• Column Chooser: Use the Column Chooser in the top-right corner to select which fields to display.

Customize your layout to show only the most relevant data. These settings are remembered per user.



### **Actions Menu**

The **Actions** menu—found at the top right of every grid—gives you powerful tools to apply changes or perform bulk operations on the records currently displayed. The options available will vary depending on which grid you're viewing.

#### Actions Available in All Grids

These core actions are consistent across **Contacts**, **Appointments**, **Proposals**, and **Invoices**:

- Add Tag Apply a tag to all items in the filtered grid.
- Remove Tag Remove a tag from all filtered items.
- Launch Email Campaign Start a targeted Email Campaign using the current filtered results.

#### **Contacts Grid Actions**

- Update Make bulk updates to selected contact records.
- **Schedule** Create appointments for all filtered contacts.
- Print Print the contact list or details.
- Generate Proposals Create proposals for all selected contacts.

#### **Appointments Grid Actions**

- Bump Reschedule appointments to a later date.
- Cancel Cancel multiple appointments at once.
- Count Appointments Get a quick total of how many appointments are in view.
- **Recalculate Durations** Re-run appointment durations if service details have changed.
- Mark Complete Mark all selected appointments as completed.

#### **Proposals Grid Actions**

- Update Edit proposal details in bulk.
- Renew Season Reissue seasonal proposals.
- Generate Generate proposal documents.
- Accept Manually mark proposals as accepted.
- Print Print all proposals currently in view.
- Duplicate Proposals Copy selected proposals to reuse for the same or other contacts.
- Mark Completed Indicate that the proposals have been fulfilled or finalized.

### **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.

I	Propos	als						file	Al Won	Open Accept	ed Una	cheduled	Projects	Actions V
	X Owner v	× Cate	pories v X Taga v	¥ Services * X Parts *	x Date v X	Status v	Add_	Reset						
	25 •											Page	1 of 1 (4 ite	ms) $\langle 1 $ of 1 $\rangle$
	Date -	Status	Nome	Service	Subtotal	Так	Total	Accepted Date	Options	Title	Visits	Duration	Value	Actions
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	7/19/2024	Open	Dracula 1 (old)	Ghost Removal	\$500.00	\$0.00	\$500.00			Ghost Removal		30 mins	\$500.00	Q   Edit   Schedule   Print
	7/19/2024	Open	Dracula 1 (old)	Ghost Removal	\$500.00	\$0.00	\$500.00			Ghost Removal		30 mins	\$500.00	Q   Edit   Schedule   Print
	7/2/2024	Open	Ned Neighborly	Monster Slaving	\$1,185.00	\$0.00	\$1,185.00			Vampire		30 mins	\$1,185.00	Q   Edit   Schedule   Print
L	5/31/2024	Open	Fred the Gordener	Honeybodger Removal	\$260.00	\$0.00	\$260.00		5 Year Warranty	Ghost Removal		30 mins	\$260.00	Q   Edit   Schedule   Print
					\$2,445.00								\$2,445.00	
	Y Create	Filter												
1	Views Def	ut	View name	Sav										
	_													

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
Reset	Default		
Rename   Delete	Delayed Acceptance		
Rename   Delete	Open Proposals		
Return to Proposals			

Then it will appear in your Shortcuts section.

Shortcuts
Add a Contact
Schedule an Appointment
My Schedule
Backlog
Delayed Acceptance
Texting

# 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.