

About Grids

11/12/2025 4:22 pm CST

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**

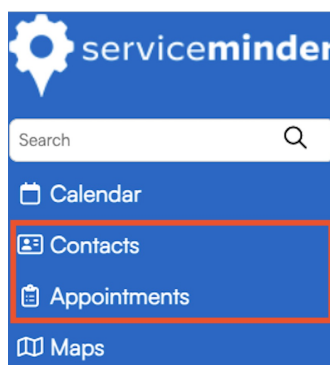
All grids share a set of core features for customization, filtering, and bulk actions. This guide walks through the common tools available across all grids, so you can work more efficiently.

This article will review:

- [Settings and Navigation](#)
- [Universal Grid Features](#)
- [Actions Menu](#)
- [Saving Views](#)
- [FAQs](#)

Settings and Navigation

The primary grids can be accessed directly from the Navigation menu.



The **Snapshots** section has quick access links to many pre-filtered grids for common purposes, like reviewing open proposals or backlog appointments.

Snapshots	
Pulse	
At a Glance	
QuickBooks Errors	121
Open Invoices	48
Projects	3
Open Proposals	5
Backlog	\$0 / 1
Expired Service	26
Tasks	2

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.

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

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.

Contacts														
50														
Page 1 of 1 (37 items)														
Address	Name	Phone	Email	Service Address	City	State	Zip	Community	Category	Ta...	Channel	Campaign	API Key	On
	Albert Einstein	(000) 00...	eequalsmcquared...	4613 Some St	Brem...	WA	98...		Prospect		Referral		Online ...	
Edit	Anna Arendelle	(123) 123-1...	annawhwhwh@are...	211 Bella Cima...	Austin	TX	78...	Costa Bella	Customer		Referral			
Edit	Arthur Dant	(333) 333...	arthurd@hitchhiker...	5836 Westsl...	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...	beautifulinight@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		Online ...	
Edit	Bob Smith	(222) 333...	anotherfakeemail@...	7213 Poulain Dr	Austin	TX	78...		Customer	Ex...	Referral			Kar
Edit	Brighton Early	(999) 999...	brightonearly@fake...	17 Cherry Tree...	Austin	TX	123...		Customer		Referral			
Edit	Brooke Trout	(656) 565...	brooketroutr@fakee...	186 Fleet Street	Austin	TX	787...	Bauerle R...	Customer		Referral			
Edit	Butch Cassidy	(123) 456...	butchcassidy@resti...	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 All Open Paid Unapproved

25 Page 1 of 2 (27 items) < 1 of 2 >

	Number	Date	Age (D...)	Status	Service	Subtotal	Total	Balance Due	Date Paid	Name	Address	City	Zip
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 Nothe	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	138621	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		Brooks Trout	186 Fleet S...	Aus...	78
Pay 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
Pay Resend	138621	3/11/20...	31	Open	Test Service	(\$100.00)	(\$100.00)	(\$100.00)		Fred Rogers	4802 E 5t...	Aus...	78
Pay Resend	BI01234	3/20/2...	22	Open	Test Service	\$1,000.00	\$1,000.00	\$1,000.00		Elsa Arendelle	110 Sender...	Lak...	78
Pay Resend	BI01237	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	BI01232	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.

Proposals

Filter All Won Open Accepted Unsubmitted Projects

25 Page 1 of 1 (8 items) < 1 of 1 >

Actions	Date	Status	Name	Service	Subtotal	Tax	Total	Accepted Date	Options	Title	Visits	Duration
Q Edit Schedule Print	4/9/2025	Open	Gale Forcwind	Test Service	\$1,000.00	\$86.30	\$1,086.30			Perfect Proposal	1 hour	30 mi
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 mi
Q Edit Schedule Print	2/13/2025	Open	Brooks Trout	Test Service	\$1,275.00	\$0.00	\$1,275.00			Example Template	1 hour	50 mi
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 mi
Q Edit Schedule Print	2/13/2025	Open	Brooks Trout	Test Service	\$1,275.00	\$0.00	\$1,275.00			Example Template	1 hour	50 mi
Q Edit Schedule Print	2/13/2025	Open	Stacey Fakenname	Test Service	\$1,275.00	\$0.00	\$1,275.00			Example Template	1 hour	50 mi
Q Edit Schedule Print	2/13/2025	Open	Anna Arendelle	Test Service	\$700.00	\$0.00	\$700.00		TEST OPTIO...		1 hour	20 mi
Q Edit Schedule Print	2/13/2025	Open	Ken Tucky	Test Service	\$600.00	\$0.00	\$600.00			Example Template	1 h	c
					\$8,100.00							

[Create Filter](#)

Views [Default](#) [Save](#)

- 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.

Appointments										
25		Page 1 of 10 (244 items) < 1 of 10 >								
Actions	Scheduled Start	Status	Tentative	First Available?	Duration	Service	Total	Invoice	Name	Address
Edit	2/29/2024 8:00a	Completed	<input type="checkbox"/>	<input type="checkbox"/>	8 hours / Man: 8 hours	Installation	\$0.00		Stacey Fakename	5678 Main Street
Edit	3/1/2024 8:00a	Completed	<input type="checkbox"/>	<input type="checkbox"/>	30 mins	Monthly Maintenance	\$405.00	I38622	Barb Dwyer	1640 Riverside Drive
Edit	3/14/2024 8:00a	Completed	<input type="checkbox"/>	<input type="checkbox"/>	30 mins	Monthly Maintenance	\$0.00	I38623	Stacey Fakename	5678 Main Street
Edit	3/15/2024 6:00a	Completed	<input type="checkbox"/>	<input type="checkbox"/>	30 mins	Monthly Maintenance	\$450.00		John Doe	1234 Easy Street
Edit	3/22/2024 8:00a	Completed	<input type="checkbox"/>	<input type="checkbox"/>	4 hours	Repair Service	\$0.00		D.S. Example	1234 Main Street
Edit	3/22/2024 12:00p	Completed	<input type="checkbox"/>	<input type="checkbox"/>	30 mins	Repair Service	\$0.00		D.S. Example	1234 Main Street
Edit	3/23/2024 8:00a	Completed	<input type="checkbox"/>	<input type="checkbox"/>	4 hours	Repair Service	\$350.00	I38624	D.S. Example	1234 Main Street
Edit	3/23/2024 12:00p	Completed	<input type="checkbox"/>	<input type="checkbox"/>	30 mins	Repair Service	\$350.00	I38627	D.S. Example	1234 Main Street
Edit	3/26/2024 9:00a	Completed	<input type="checkbox"/>	<input type="checkbox"/>	8 hours / Man: 8 hours	Bathroom Install	\$520.00	I386210	John Doe	1234 Easy Street
Edit	3/27/2024 8:00a	Completed	<input type="checkbox"/>	<input type="checkbox"/>	30 mins	Test Service	\$0.00	I38628	Stacey Fakename	5678 Main Street
Edit	3/27/2024 8:00a	Completed	<input type="checkbox"/>	<input type="checkbox"/>	30 mins	Test Service	\$0.00	I38629	Barb Dwyer	1640 Riverside Drive
Edit	4/3/2024 6:00a	Completed	<input type="checkbox"/>	<input type="checkbox"/>	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.

Filter

Upload...

Actions

Column Chooser

☒ Name

☒ Phone

☒ Email

☒ Service Address

☒ City

☒ State

The appointments grid is designed to optimize performance by limiting the number of custom fields displayed

and loaded at one time. When a user visits the appointments grid for the first time, up to **50 custom fields** are displayed by default. This limit ensures faster load times and smoother navigation.

- To view additional custom fields, use the **Column Chooser** to select the fields you'd like to add.
- Once you customize your grid view, your selections are saved and will be remembered for future visits.
- If you'd like to return to the default view, select **Views > Reset**. This resets your grid to the initial 50-field layout.

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.

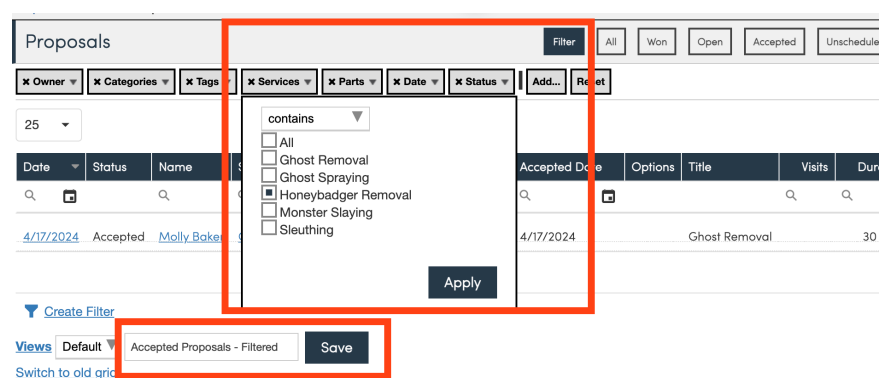
Proposals Grid Actions

- **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.

The screenshot displays the 'Proposals' grid view. It features a table with columns: Date, Status, Name, Service, Subtotal, Tax, Total, Accepted Date, Options, Title, Visits, Duration, Value, and Actions. The table contains several rows of proposal data. At the bottom left, there's a 'Views' link and a 'Default' dropdown menu, along with a 'Save' button.

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	<input type="checkbox"/>	<input type="checkbox"/>
Rename Delete	Delayed Acceptance	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Rename Delete	Open Proposals	<input type="checkbox"/>	<input type="checkbox"/>

[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.