

Grid Filtering and Custom Filters

11/04/2024 11:12 am CST

Overview

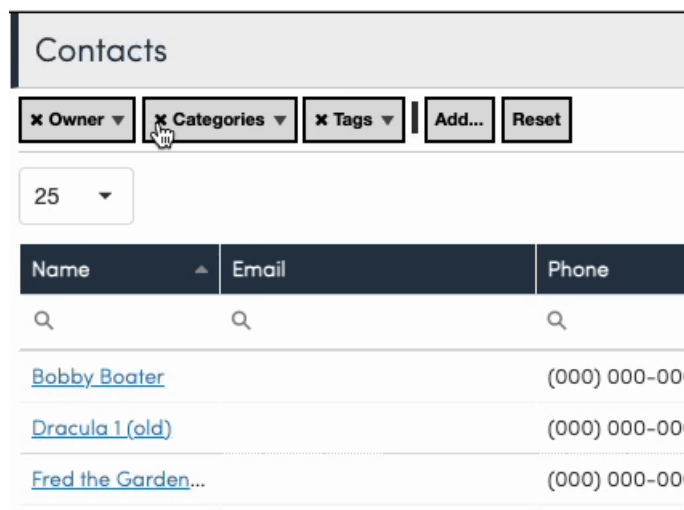
ServiceMinder has four useful grids that provide crucial information about your business - Contacts, Appointments, Proposals, and Invoices. In order to leverage this information in the most powerful way, we provide built-in and custom filtering on each of these grids.

This article will review:

- [Default Filters](#)
- [Filtering Appointments](#)
- [Custom In-Grid Filtering](#)
- [Saving a View](#)
- [FAQs](#)

Default Filters

When working with large numbers of contacts, it's always a good idea to filter using the **Filter** button first, then fine tune your results if needed using in grid filtering. If you click **Apply**, that condition will be applied to the grid. You can click on other terms without clicking **Apply** to set up multiple conditions before applying the filter.



The screenshot shows the 'Contacts' grid interface. At the top, there are filter buttons: 'x Owner', 'x Categories', and 'x Tags', followed by 'Add...' and 'Reset'. Below these is a dropdown menu showing '25'. The grid itself has columns for 'Name', 'Email', and 'Phone'. The first row shows search icons for each column. The second row shows a link for 'Bobby Boater' and the phone number '(000) 000-00'. The third row shows a link for 'Dracula 1 (old)' and the phone number '(000) 000-00'. The fourth row shows a link for 'Fred the Garden...' and the phone number '(000) 000-00'.

Name	Email	Phone
🔍	🔍	🔍
Bobby Boater		(000) 000-00
Dracula 1 (old)		(000) 000-00
Fred the Garden...		(000) 000-00

Adding Default Filters

To add more terms, click the **Add...** button and then choose from the dropdown list of terms. To remove an existing term, click the **X** on the term. The filter will be automatically applied when you do this.

× Categories ▾ × Tags ▾ × GeoZones ▾ × Next Appt ▾ Add... Reset

Term

Apply Cancel

⏪ ⏩

You can add as many terms as you would like. Keep in mind that each term is "anded" with the other terms and the checkbox lists are "any of" or "not any of" conditions.

For example, by using a Tags term and choosing a few tags with **contains** and another Tags term and choosing a few other tags with the **doesn't contain** condition, you can find all contacts who have any tags in the first list and no tags in the second list.

Once you've filtered as much as you can with the main Filter menu, you can find tune your results with In-grid Filtering.

Filtering Appointments

When on the **Appointments Grid**, you may want to view appointments within a certain date range, not just upcoming. If you click the **All** quick filter, this will display unfiltered results just for today - this limits the amount of data that is requested at one time. Some locations can have hundreds of thousands of appointments, causing the site to time out. This way, the appointments will load for you quickly and give you the option to filter to a range without being disrupted.

To view older appointments, click **Filter**, and move to the **Services** dropdown.

Scroll below your services, and enter your desired dates in the input fields.

Appointments

Filter All

Status Categories Services Parts Service Agents Tags GeoZones Add... Reset

Page 1 of 6 (128 items)

Add... Scheduled Status

06/01/2022

06/30/2022

Apply

First Available	Duration	Service Name	Total
No	30 mins	Recurring Service with promo...	\$904
No	2 hours	Annual Maintenance	\$2,115
No	8 hours / M...	Installation	\$0
No	2 hours / Ma...	Residential Cleaning	\$183
No	1 hour 45 mins	Carpet/Tile Cleaning	\$0
No	2 hours / Ma...	Residential Cleaning	\$235
No	8 hours / M...	Installation	\$0
No	8 hours / M...	Installation	\$20
No	30 mins	Recurring Service with promo...	\$149
No	30 mins	Recurring Service with promo...	\$85
No	1 hour 45 mins	Carpet/Tile Cleaning	\$183
No	2 hours / Ma...	Residential Cleaning	\$0
No	8 hours / M...	Installation	\$0
No	2 hours	Annual Maintenance	\$199
No	30 mins	Recurring Service with promo...	\$135
No	2 hours / Ma...	Residential Cleaning	\$0
No	1 hour 45 mins	Carpet/Tile Cleaning	\$183

Custom In-Grid Filtering

Many grids also support filtering directly on any single column (in-grid filtering). You can click the little funnel icon in the column header. It will display options for showing only rows that contain a specific value or rows that are empty or not empty. Some grids also have the ability to perform much more complicated filtering. If the bottom grid has a **Create filter...** then the grid supports compound filtering.

 [Create Filter](#)

When you click the link, a dialog will be displayed in the middle of the grid. You can click on the + icon and select a field to filter on. The next link will let you select the comparison (such as equal, not equal, greater than, between, etc.) Then depending on the comparison you selected, you'll be able to enter values.

Filter Builder

And

OK Cancel

Select the comparison (such as equal, not equal, greater than, between, etc.) Then depending on the comparison you selected, you'll be able to enter values.

Getting Rid of Custom Filter

If you have used a Custom Filter, then it will stay on until you turn it off or delete the filter.



If you have an unselected filter at the bottom and don't Clear it, the next time you use a custom grid filter it will automatically add that to the existing, unselected filter.



1. You can either Uncheck the box. This will keep the filter if you ever want to use it again.
2. Or click on the filter link (it is blue and underlined). Just as you clicked the green + to add a filter, click the red X to delete the filter. Then click Ok.

Filter Builder

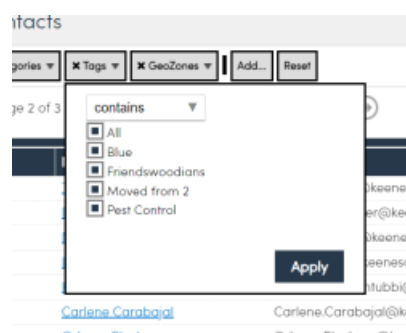


Special Considerations

Multiple Values - The custom column filters aren't as good at filtering where there may be multiple values.

For example, if filtering on Tags, you may want to filter on just one, but the filter will narrow it down to contact that have that tag *only* - excluding contacts that may have the tag but also another; it works as an either/or in that way.

Using the Filter button and selecting the Tags you want there will give you more accurate results.



Saving a View

After setting your filters, at the bottom of the screen you can type in a name and hit Save, and this creates a new View for you.

[Views](#)

Default ▼

Customers

Save

Click **Views** to see any saved views that you have.

Checking the box for **Shared** will allow other users in that org to see the saved view.

The **Shortcut** box will add it into the left sidebar in the Shortcut section for easy access.

Manage Views for Contacts

Action	Name	Shared	Shortcut
Reset	Default	<input type="checkbox"/>	<input type="checkbox"/>
Rename Delete	Customers	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Rename Delete	Example View	<input type="checkbox"/>	<input type="checkbox"/>

[Return to Contacts](#)

Shortcuts

Add a Contact

Schedule an Appointment

My Schedule

Sales Process

Customers

Texting

FAQs

I only see a fraction of my contacts, what happened?

You may have a filter on. Look at the bottom of the grid and look for a funnel icon. If you see a custom filter turned on, then you need to uncheck the box or delete the filter. Don't forget that there are default filters so if that isn't the issue, check the filters at the top of the grid and make sure you don't have data filtered by category or date.

My grid view is stuck. How can I restore it?

You may not noticeably have any filters set, but you can tell you aren't seeing all of the contacts you should. If the default view ever seems "stuck," you can go into Views (at the bottom) and Reset the Default view to get it back to neutral.

Home > Contacts > Manage Views

Manage Views for Contacts

Action	Name
Reset	Default

[Return to Contacts](#)



Make sure you don't accidentally reset any custom views you've saved - only do this for the Default if the grid is stuck.