

Pivot Grids

11/19/2025 3:03 pm CST

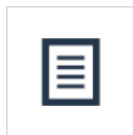
Overview

The **Pivot Grid** is a dynamic reporting tool in serviceminder that allows you to interactively analyze, filter, and group data. It's especially helpful for identifying trends and comparing key business metrics, such as:

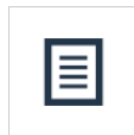
- **Repeat Revenue vs. Initial Revenue**, year over year
- **Proposal Values** across campaigns and time periods

Settings and Navigation

In the Reports section, you will find a **Proposal Pivot Grid** and a **Revenue Pivot Grid**.



☆ [Proposal Pivot Grid](#)
Interactive pivot grid of proposal data.



☆ [Revenue Pivot Grid](#)
Interactive pivot grid of invoice data.

Using a Pivot Grid

The interface is divided into four key areas that determine how your data is displayed:

Revenue Pivot Grid

Page 1 of 24 (591 items)

1

2

3

4

5

6

7

...

22

23

24

Part Category

Invoice Number

Channel

Campaign

Repeat

Qty

Count

Zip

Subtotal

Year

Qtr

Month

Service

Part

Qtr 4

Qtr 4 Total

2024 Total

2025

Qtr 1

October

November

December

January

February

March

Area Rug

Bathroom

BB3-2

BB7

Bedroom

Bundle Assembly

\$0.00

\$150.00

\$0.00

\$150.00

\$150.00

\$100.00

\$0.00

\$0.00

\$0.00

1. Filter Header Area

Located at the top, this section is where you can drag field headers to control how your data is grouped into **rows** or **columns**.

- To create a **column group**, drag a field to the **Column Headers** section.
- To create a **row group**, drag a field to the **Row Headers** section.
- You can also remove groupings by dragging fields back up to the Filter Header Area.

2. Column Header Area

This section defines the **columns** of your grid. The fields placed here determine how data is grouped and displayed horizontally.

3. Data Header Area

Found adjacent to the column headers, this area contains the **summarized values**—such as totals or counts—you want to analyze. Typically, each Pivot Grid offers:

- A **line-level header** (e.g., invoice line items)
- A **document-level header** (e.g., the invoice or proposal itself)

Choose one depending on the level of detail you need. Using both may result in duplicated data if not configured carefully.

4. Row Header Area

This section determines how your data is grouped **vertically**. Common use cases include:

- Grouping by **Service**
- Grouping by **Part**

Both fields are included by default. If you only want one, simply drag the other to the Filter Header Area to exclude it.

FAQs

Q: What's the difference between line-level and document-level data headers?

A: Line-level headers show individual service or part items within a document. Document-level headers summarize entire proposals or invoices. Use one or the other depending on the level of detail you need.

Q: Can I save my custom Pivot Grid layout?

A: Yes! After customizing your grid, scroll down and save it as a **View**. You can also mark it as a **Shortcut** so it appears in your sidebar for quick access.

Q: Why is my data repeating or duplicating?

A: This usually happens when both line-level and document-level headers are used together. Choose one based on whether you want detailed or summarized data.

Q: Can I export Pivot Grid results?

A: Absolutely. Use the download icon to export your current view to Excel for further analysis or sharing.

Q: Are Pivot Grids available on the mobile app?

A: No. Pivot Grids are available only in the desktop interface.
