What's New: Grid Custom Fields and the Grid Report

08/14/2026 10:50 am CDT

Overview

Grid Custom Fields give you a structured way to capture repeatable information on appointments. With the latest enhancements, grids can collect more flexible data and feed that information into a dedicated Grid Report for compliance, audit, and operational reporting.

This article will review:

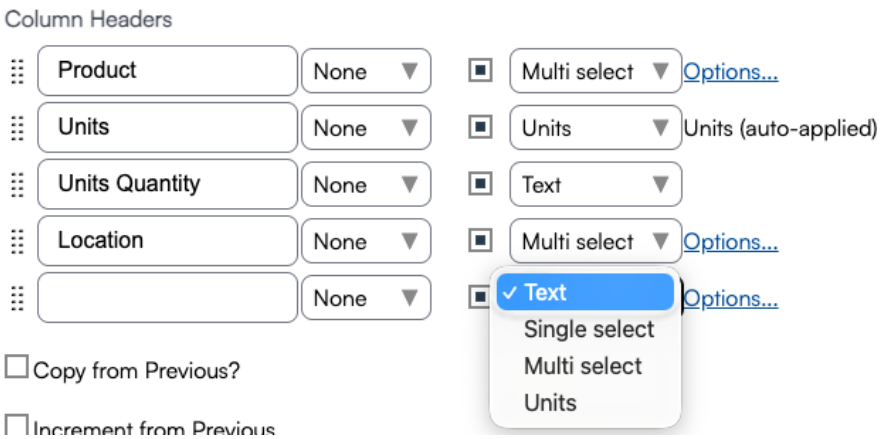
- Configuring Grid Custom Fields
- Using a Grid Custom Field on an Appointment
- Grid Report

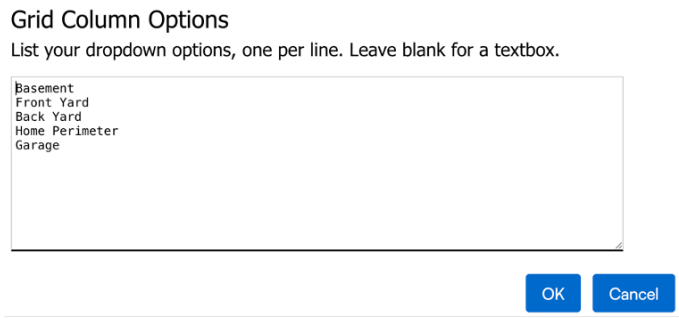
Configuring Grid Custom Fields

Enter a header for each piece of information you want to gather. Each grid column can be configured to match the type of data you want Service Agents to record.

- Text - enter free-form information.
- Single Select - choose one value from a predefined list.
- Multi Select - choose more than one value in the same grid cell.
- Units - select a unit of measure for a quantity that you want to capture (see below for more info)

For Single Select or Multi Select columns, click Options and list the choices you want to display in the dropdown menu, one item per line.





Capture Quantities with Units of Measure

For grids that capture measurable quantities - such as product application amounts - you can configure a column as Units. The available unit choices are managed by ServiceMinder and include supported volume and mass measurements.



When you add a Units column, ServiceMinder automatically creates a paired Quantity (Sum) column immediately after it. This pairing lets the Grid Report understand which quantity belongs to which unit and makes standardized unit conversion possible later in the reporting workflow. Keep reading to learn more about how to standardize measurements with unit conversion in the Grid Report.

Important: Unit conversion only combines compatible measurements. Volume measurements can be standardized with other volume measurements, and mass measurements with other mass measurements. ServiceMinder will not combine measurements across those categories.

Calculations for Numeric Data

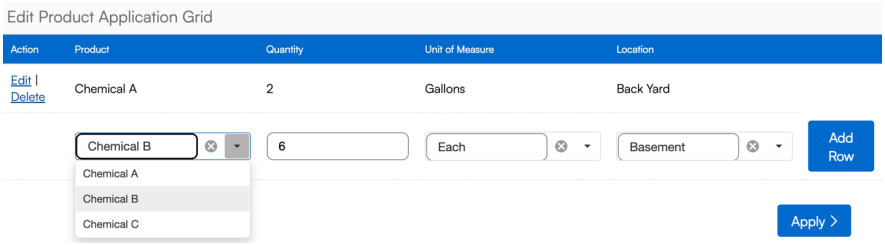
For columns that contain numeric data (and do not require unit conversion), you can choose a calculation that ServiceMinder should display in the Grid Report. Available calculations include:

- Sum
- Minimum
- Maximum
- Average (Mean)
- Count

Calculations are based on the values captured in that column and give you a quick way to summarize report data without calculating it separately.

Using a Grid Custom Field on an Appointment

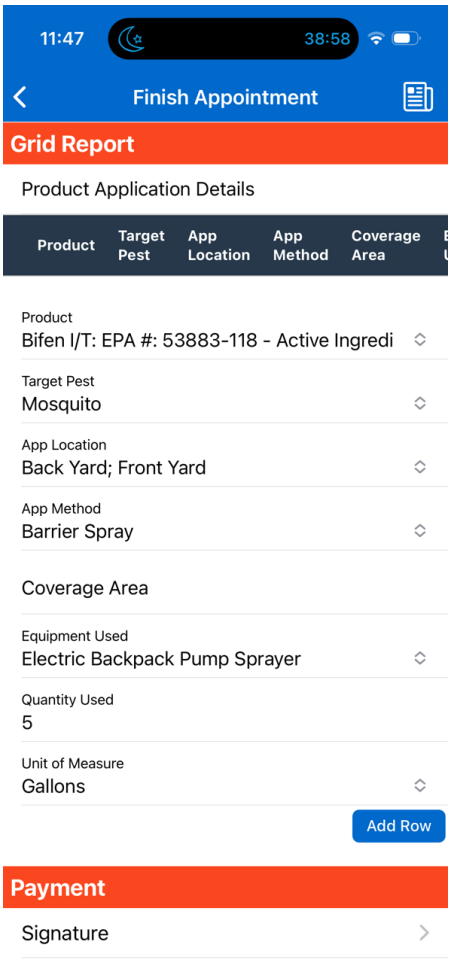
On the web, click Edit beneath the Grid Custom Field. Enter the information for a row, then click Add Row. Add as many rows as needed, then click Apply to save the grid to the appointment.



Web entry supports repeatable rows for structured appointment data.

In the mobile app, grid entry fields appear directly in the appointment flow. Enter the data for the row, tap Add Row, and repeat as needed before continuing with the appointment.

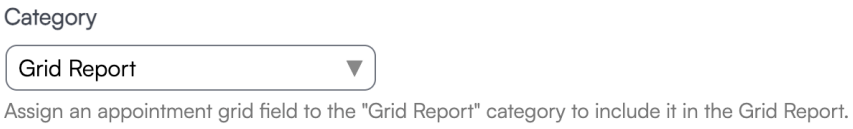
Multi-select columns allow a Service Agent to record more than one predefined value in a single cell - useful for scenarios such as multiple target pests, treatment areas, products used, or other compliance details.



Grid Report

The Grid Report turns the structured data captured on appointments into a dedicated report that can be filtered, summarized, and exported. It is especially useful for compliance, audit, product-application, and status reporting.

To use a Grid Custom Field with the report, assign an appointment-type Grid Custom Field to the Grid Report category. Each row captured in that grid becomes reportable data alongside related organization, contact, appointment, and Service Agent information.



Assign the appointment Grid Custom Field to the Grid Report category.

> **Note**
>
> Only one appointment Grid Custom Field can be designated for the Grid Report at a time.

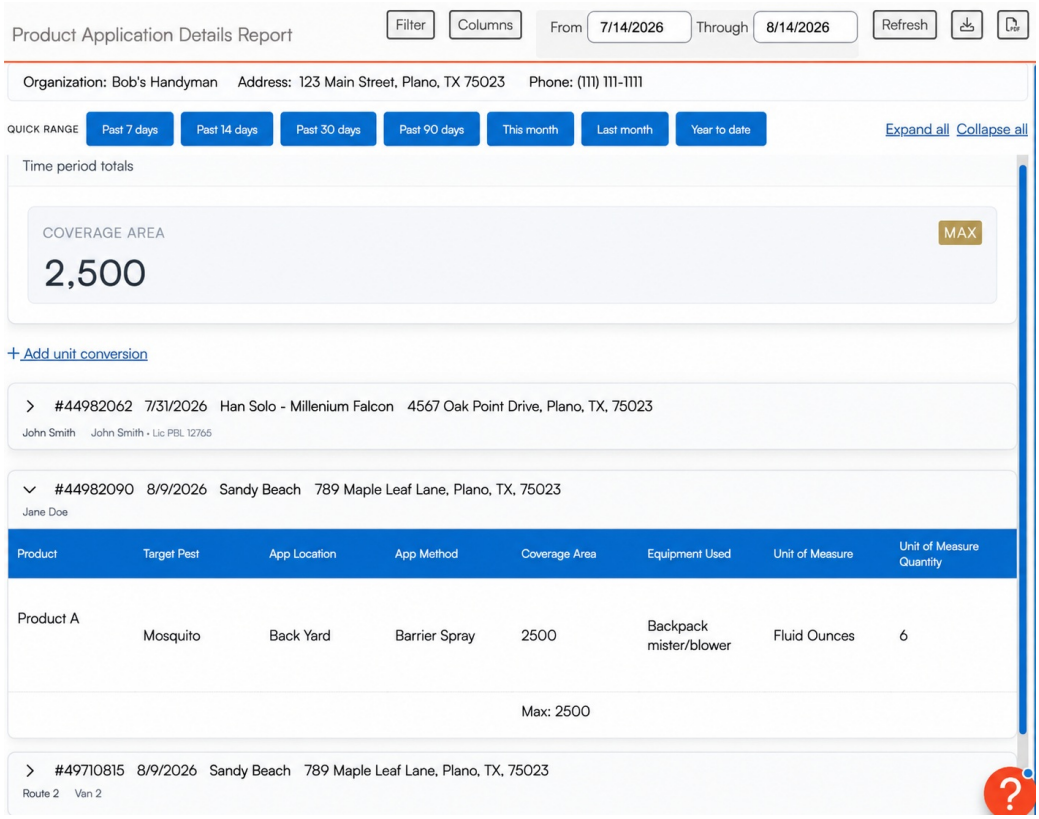
In **Reports**, open the dedicated **Grid Report** to work with the captured data.



Filter and Organize the Report

Use the quick date ranges or a custom From/Through range to control which appointments are included. You can also use Filter to narrow the results by report columns or location information such as state, city, or ZIP code.

Click Columns to control which fields are included in the CSV export. After changing filters or date ranges, click Refresh to update the report.



Standardize Measurements with Unit Conversion

If the grid includes a configured Units column, the Grid Report can standardize quantities that were entered using different units of measure. This prevents totals from combining raw numbers that represent different measurements.

Select **+ Add Unit Conversion** in the Grid Report, then choose the standard unit you want to use for volume and/or mass. You can also choose how you want the converted results grouped.



When conversion is applied, the report adds:

- Converted Quantity - the quantity expressed in the selected standard unit.
- Standard Unit - the unit used for the converted quantity.
- Standardized totals - totals calculated from converted values, respecting the selected group-by.

> Rows with a blank or unrecognized unit, or a quantity that cannot be interpreted as a number, are excluded from converted totals. ServiceMinder displays a warning when report rows could not be included so those records are not silently combined or misrepresented.

Unit conversion is applied on the reporting side only. Service Agents can continue entering appointment data in the unit that accurately reflects the work performed; the report can standardize those measurements later when you need comparable totals.

Exporting the Grid Report

CSV Export

Use Columns to choose the report fields you want to include, then export the data to CSV. If unit conversion is applied, Converted Quantity and Standard Unit are included as report data in the CSV so you can continue working with the standardized values outside ServiceMinder.

The report's visual totals card and group-by presentation are not reproduced in the CSV export; the export contains the underlying row-level data and selected columns.