

Filtering, sorting and exporting records

Getting started

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Filtering, sorting and exporting records

Narrow a list to what you need, sort it, save the view and export it to a spreadsheet.

Beginner · About 10 minutes · Version 1.0 · Updated 17 November 2026

Overview

Lists can grow to thousands of rows. Filters and sorting let you find exactly what you need, and you can export the result.

Steps

Filter

1. Open a list, for example **Sales Invoice**.
2. Type into the boxes above the table, such as **Customer** or **Status**, for a quick filter.
3. For more control, click **Filter**, then **Add a Filter**. Choose a field, a condition (equals, like, between) and a value, for example *Status equals Overdue*.
4. Click the **x** next to Filter to clear all filters.

Sort

1. Use the **Last Updated On** button at the top right to choose a field.
2. Click the arrow beside it to flip between ascending and descending.

Save a filter

1. With your filters set, find **Save Filter** in the left sidebar.
2. Type a name, such as *Overdue invoices*, and click **Save**. It appears in the sidebar for next time.

Export

1. Click the **...** menu at the top right of the list.
2. Choose **Export**, then pick **Excel** or **CSV**.
3. Choose the columns you want, and click **Download**.

Practical example

To chase late payers: filter **Sales Invoice** by *Status equals Overdue*, sort by **Due Date**, save the filter as *Overdue invoices*, and export to Excel to share with the person making the calls.

Important notes

- The left sidebar of a list also has **Filter By** (Assigned To, Created By, Tags), which count records for you.
- Exports include only what you are allowed to see.

Common mistakes

- Forgetting a saved filter is on, then thinking records are missing. Check for a number beside the Filter button.

Next steps

Read Reports.

Related documentation

- Running and saving reports
- List views and form views