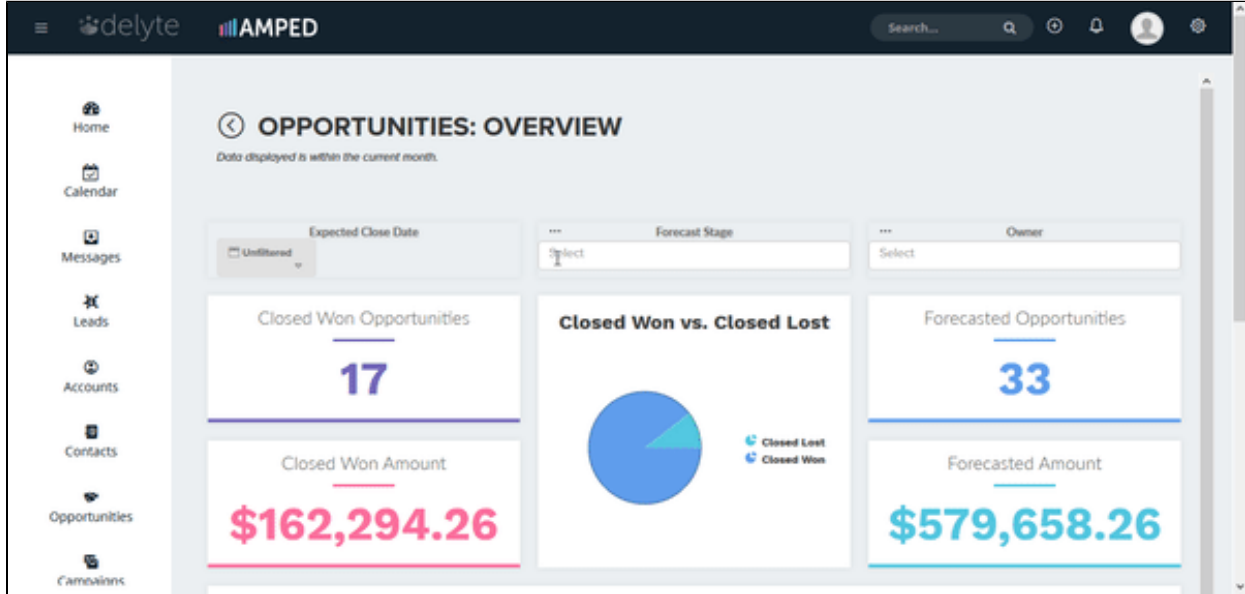


Filtering

Activity reports are defaulted to display data within the current week. Opportunity reports are defaulted to display data within the current month. Each report has date selector and multi-select filters that allow users to dig further into their data. Multi-select filters have the option to "Exclude Selection" which removes that data from the reports. Selected filters can be cleared by clicking "Reset Filters".

[Filtering \[Video\]](#)

Excluding a Selection



Excluding a selection allows you to filter out certain aspects of your data. Multi-select pick lists allow you to exclude multiple values at once.

Historical Filtering

The screenshot shows the historical filtering interface. It includes three radio buttons for 'Today', 'Yesterday', and 'Year-To-Date'. Below these are three main filtering options: 'Current' (selected), 'Within the', and 'Between'. The 'Current' option has a dropdown menu with 'Day' selected. The 'As of' checkbox is checked, and its dropdown menu is open, showing options: 'Last Week', 'Last Month', 'Last Quarter', and 'Last Year'. The 'Within the' option has a dropdown for 'last', a text input '2', and another dropdown. The 'Between' option has two text input fields and a calendar icon. At the bottom, there are 'Close' and 'Apply' buttons.

Historical filtering allows you to dive deeper into your data. When you select the "As of" check box, you can choose to see the Current Day, Week, Month or Quarter "As of" a historical period of time. For example, the month is August 2018 and you want to compare your closed opportunities from August of 2017. Simply choose to see the Current Month "As of" Last Year to display the details from August 2017.