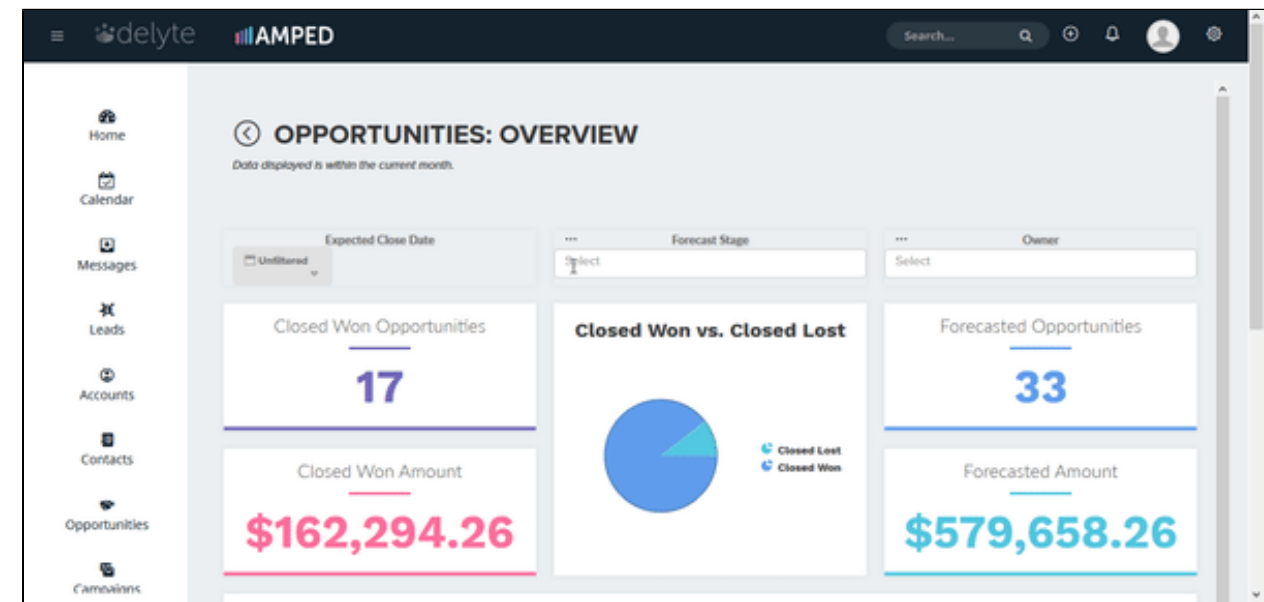


Filtering

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. At the top, there are three tabs: "Today", "Yesterday", and "Year-To-Date". Below the tabs, there are three radio buttons: "Current", "Within the", and "Between". The "Current" radio button is selected. To the right of the "Current" radio button, there are two dropdown menus: "Day" and "As of". The "As of" dropdown menu is open, showing a list of options: "Last Week", "Last Month", "Last Quarter", and "Last Year". The "Last Week" option is highlighted. Below the "As of" dropdown menu, there are two input fields: "last" and "2". The "Within the" radio button is also visible. Below the "Within the" radio button, there are two input fields: "last" and "2". The "Between" radio button is also visible. Below the "Between" radio button, there are two input fields: "and" and "and". At the bottom of the form, there are two buttons: "Close" and "Apply".

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.