Recently Contacted Smart View Filter List

You can create a smart view filter that will give you a list view of your recently contacted records. Leads or contacts will be more likely to close a deal with frequent communication because you stay top-of-mind.

In the filter settings below, two advanced filters are used: **Last Activity > Greater or equal > 9-1-2020** and **Last Activity > Less or equal > 10-31-2020.**

- Using **Greater or equal** in the first advanced filter will include all records who's last activity was reported on/after 9-1-2020.
- Using **Less or equal** in the second advanced filter will include all records who's last activity was reported before/on 10-31-2020.

The combination of both of these advanced filters will give the user a view of leads who's last activity was reported on/after 9-1-2020 and before/on 10-31-2020.

The dates must be entered as MM-DD-YYYY and not MM/DD/YYYY.

Click here for a video tutorial.

Leads > Edit Custom View   ✕

DETAILS
*View Name: | Not recently Contacted |

☐ Set as Default (Personal)   ☐ Set as Public - Share company wide

CHOOSE COLUMNS

| ✕ First Name ▼ | ✕ Last Name ▼ | ✕ Company ▼ | ✕ Last Activity ▼ |
| ✕ Owner ▼ | Select a column ▼ | Select a column ▼ | Select a column ▼ |

SORT ORDER

| ✕ Last Activity ▼ | ● Ascending   ○ Descending   *[NOTE: Selecting sort field can slow down the loading of list view for this filter]*

STANDARD FILTERS

Select a column:	Select Duration:	Start Date:	End Date:
Select a column ▼	Select Duration ▼	📅	📅
		(mm-dd-yyyy)	(mm-dd-yyyy)

ADVANCED FILTERS

Set the search conditions to further restrict the list.

- You can use "or" filters by entering multiple items in the third column.
- You can enter as many item as you like, separated by commas. For example: CA, NY, TX, FL searches for CA or NY or TX or FL.

✕ Last Activity ▼	✕ Greater or equal ▼	9-1-2020	And
✕ Last Activity ▼	✕ Less or equal ▼	10-31-2020	And
✕ Owner ▼	✕ Equals ▼	ampedsupport@vantage.com	And