Deals & Tasks: Filters & Views

Your **Deals** and **Tasks** screens in TargetCRM/Notify360 contain a variety of filtering tools that allow you to narrow your display to only the most relevant records. Many of these filtering tools are **Persistent**, meaning that your TargetCRM/Notify360 system will remember how you configured them, even after leaving and returning to the program.

Deals:

Search Bar – This field at the top of the **Deals** screen lets you search by Customer Name, Assigned Salesperson, or Deal Title. The *Search* field accepts partial entries, and the displayed records will update as you type.

Select Pipeline Drop-down Menu – If you have multiple **Deals** pipelines, this menu will allow you to select the one you want to view. By default a user will view the first pipeline that is configured for their department/location. As soon as you select a pipeline from this menu, that is the pipeline that will display when you open the **Deals** screen until you select another.

Filters – The Filter button opens the Filter Deals drawer, where you have 3 options for filtering your **Deals**:

> *Assignment* – This drop-down menu allows you to select one or more users, to view **Deals** that are assigned to any of them.
>
> *Age* – This drop-down menu allows you to view **Deals** based on their entry date. You can choose from: All Time, Past year, Past 6 months, Past 90 days, or Past 30 days.
>
> *Status* – This drop-down menu will switch the deals that display on the pipeline: Open deals, Won deals, Lost deals, or Archived deals.
>
> The filters you choose will remain in effect until you change them.

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Tasks:

Search Bar – This field at the top of the **Tasks** screen lets you search by Subject or Customer. The *Search* field accepts partial entries, and the displayed records will update as you type.

<u>Date Range</u> Button – By default, all **Tasks** will display, but this date range button allows you to limit the display to **Tasks** that are scheduled during a specific time period. Note these <u>Date Range</u> selections remain until you change them. You can select a date range using the calendar display, or use one of the available buttons:

<u>Today</u> – Displays **Tasks** scheduled for today.

<u>This Week</u> – Displays **Tasks** scheduled this calendar week, Sunday to Saturday.

<u>Next Week</u> – Displays **Tasks** scheduled for next calendar week.

<u>Reset</u> – Resets the display to include all **Tasks**, regardless of due date.

<u>Filters</u> – The <u>Filter</u> button opens the Filters drawer, where you have 5 options for filtering your **Tasks**:

Location – This drop-down menu allows you to select a location to view only **Tasks** for that location.

Assignment – This drop-down menu allows you to select one or more users, to view **Tasks** that are assigned to any of them.

Task Type – This drop-down menu allows you to select one task category (call, appointment, etc.) to view.

Task Status – This drop-down menu allows you to view tasks that are due, completed, or overdue.

Archived Tasks – This checkbox will let you view tasks that have been archived when their related **Deal** was archived.

<u>Reset Filter</u> – This button will reset all filters to their default values. This is important because filters settings are kept until changed or reset.