

Navigate to Tasks Tab

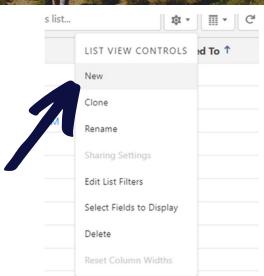
Click Gear Icon for "List View Controls"

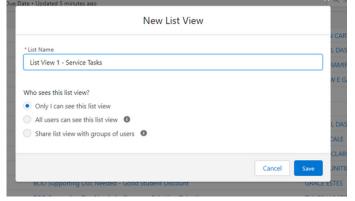
Click "New"

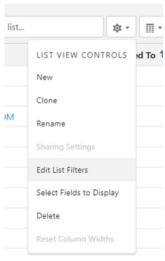
Name the List as shown

After list is created, go back to the list view controls (Gear Icon)

Select "Edit List Filters"









List View 1 Notes

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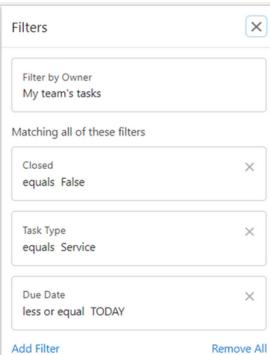
Clear out (via the X) all existing filters

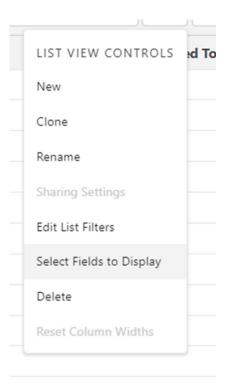
Add ONLY these as shown

After clicking "Save" the list will populate

After List populates, navigate back to List view controls

Click Select Fields to Display







List View 1 Notes



Use the arrows in between the two boxes to move ONLY the fields listed here into the "Visible Fields" Section

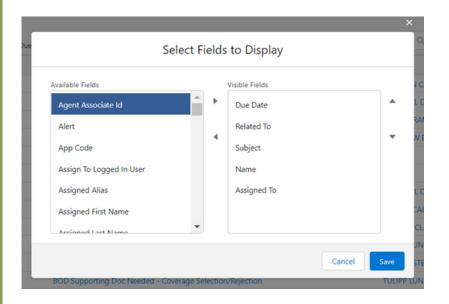
Use the Left arrow to move all other fields out

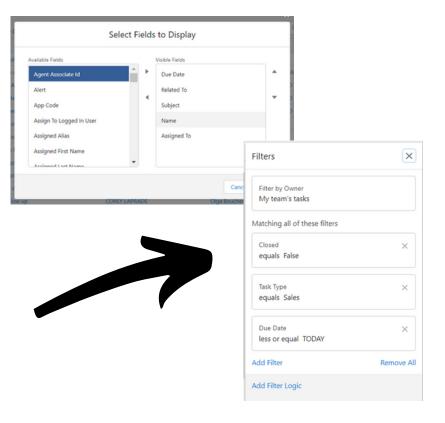
Use the Up/Down arrows on the right to arrange them in this order

After clicking Save, this list is complete
- Must be done on every team member's
ECRM

Repeat the same process to create a new list, but use these filters and call it

"LIST VIEW 3 - SALES TASKS"







List View 1/3 Notes

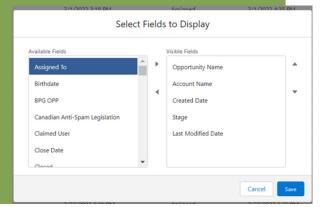


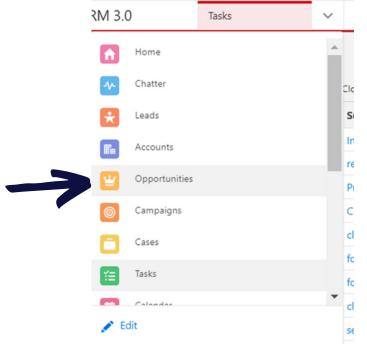
List View 2 is an opportunity list
Complete the same process to create
a new list, but it must start from the
"Opportunities" Tab instead of the
"Tasks" Tab

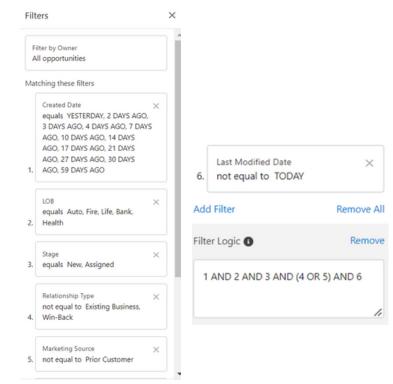
Create a new Opportunity list and call it "List View 2 – Leads No Contact"

Use these filters and add filter logic to EXACTLY match

Use these fields to display







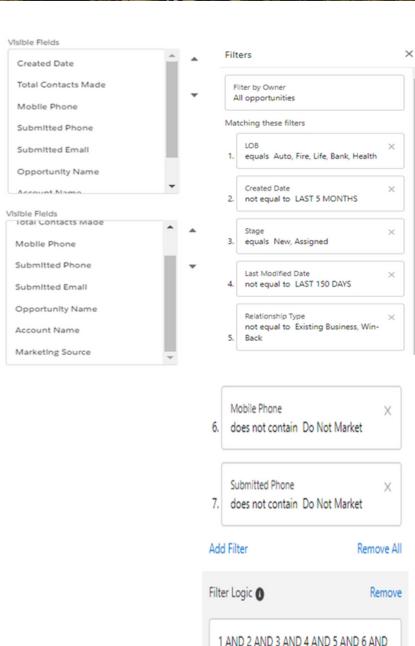


List View 2 Notes



Old Leads 60+ Days

Create another opportunity list called "Old Leads 60+ Days" and use the filters and views as shown





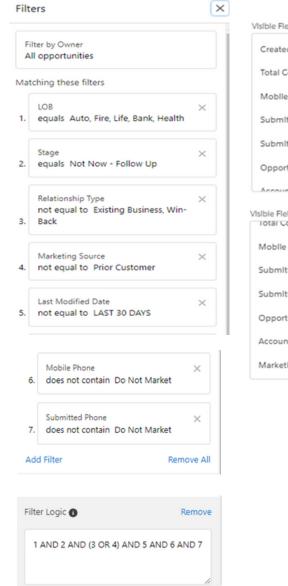
Old Leads Notes

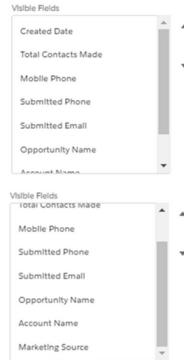


Ghosted Leads

Create another opportunity list view

This list will contain tasks that we have followed up with but have lost contact with the customer







Ghosted Leads Notes

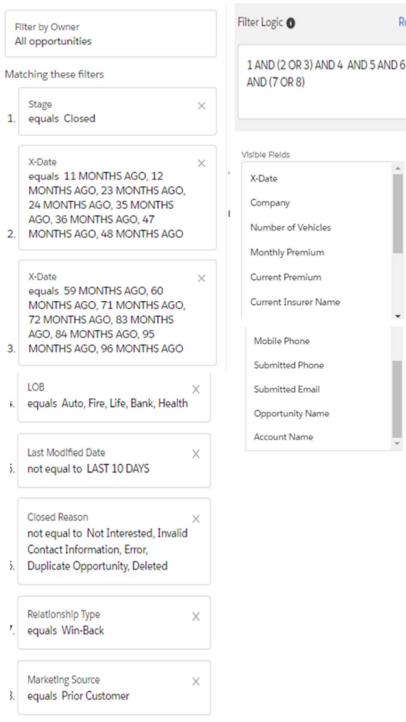
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dd Filter

Win-backs

Create another opportunity list view and name it Win-backs



Remove All

Remove



Win-Backs Notes

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Sales Notes



Service Notes

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