

How to Filter all Leads?

Lead filtering helps you quickly narrow down your lead list and focus on specific groups of leads. This makes it easier to find relevant records, monitor lead activity, and perform targeted follow-ups without manually searching through all leads.

Steps

1. Navigate to the **CRM** page.

Filter by Recent Activity

1. Locate the **Recent Active** filter on the CRM page.
2. Click the filter to view recently active leads.
3. You can also filter leads based on activity from the last seven days.

Filter by Email Status

1. In the **Email** column, click the filter icon.
2. Select one of the available options:
 - Good
 - Bad
 - Empty
 - All

The CRM will display leads matching the selected email status.

Filter by Phone Status

1. In the **Phone** column, click the filter icon.
2. Select one of the available options:
 - Good
 - Bad
 - Empty
 - All

The CRM will display leads matching the selected phone status.

Filter by Created Date

1. In the **Created Date** column, click the filter icon.
2. Select a predefined date range or specify a custom date range.
3. Apply the filter.

The CRM will display leads created within the selected date range.

Filter by Tags

1. In the **Tags** column, click the filter icon.
2. Select one or more tags.
3. Apply the filter.

The CRM will display leads assigned to the selected tags.

Filter by Stage

1. In the **Stage** column, click the filter icon.
2. Select one or more stages.
3. Apply the filter.

The CRM will display leads assigned to the selected stages.

Filter by Source

1. In the **Source** column, click the filter icon.
2. Select one or more sources.
3. Apply the filter.

The CRM will display leads associated with the selected sources.

“ **Note:** When filtering by source, the CRM has an option to include the leads those currently have the selected source as well as leads that have had the selected source at any point in their source history. The option can be enabled by selecting the checkbox for "Include Previous sources".

Result

The CRM will display only the leads that match the selected filter criteria, making it easier to locate, organize, and manage specific groups of leads.

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