

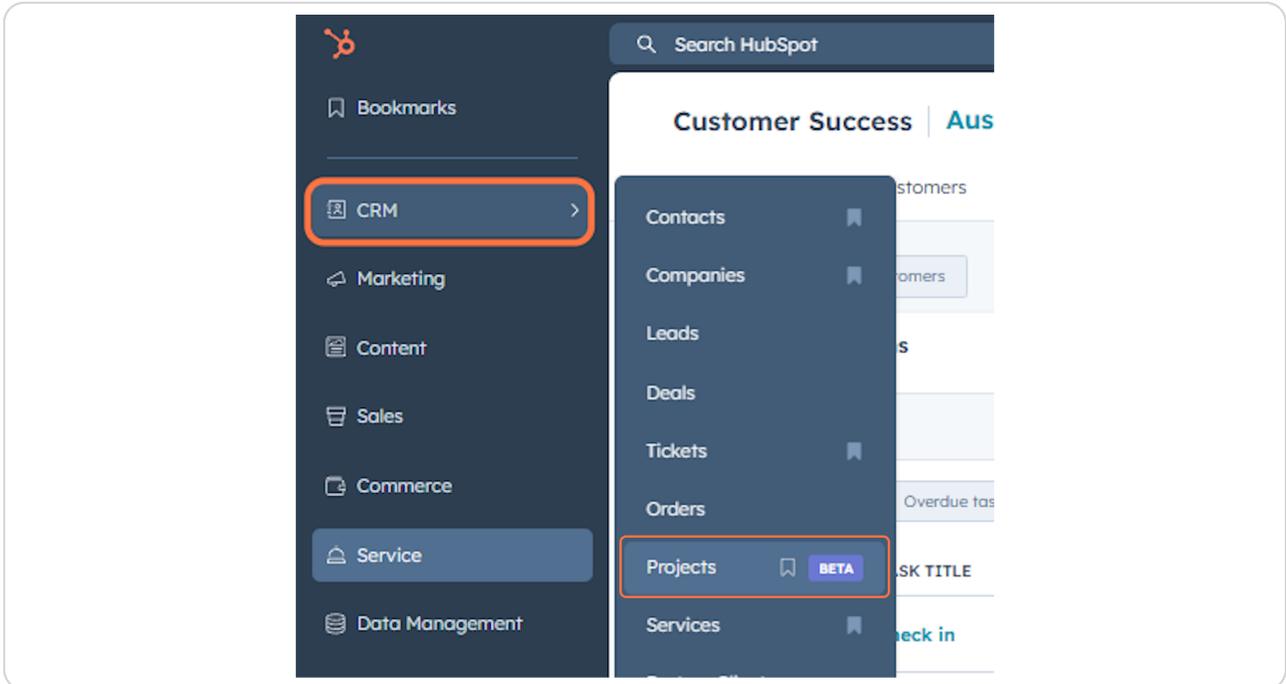
Manage CRM Index Views and Filters

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Created by	Creation Date	Last Updated
Logical Position	Feb 17, 2026	Feb 17, 2026

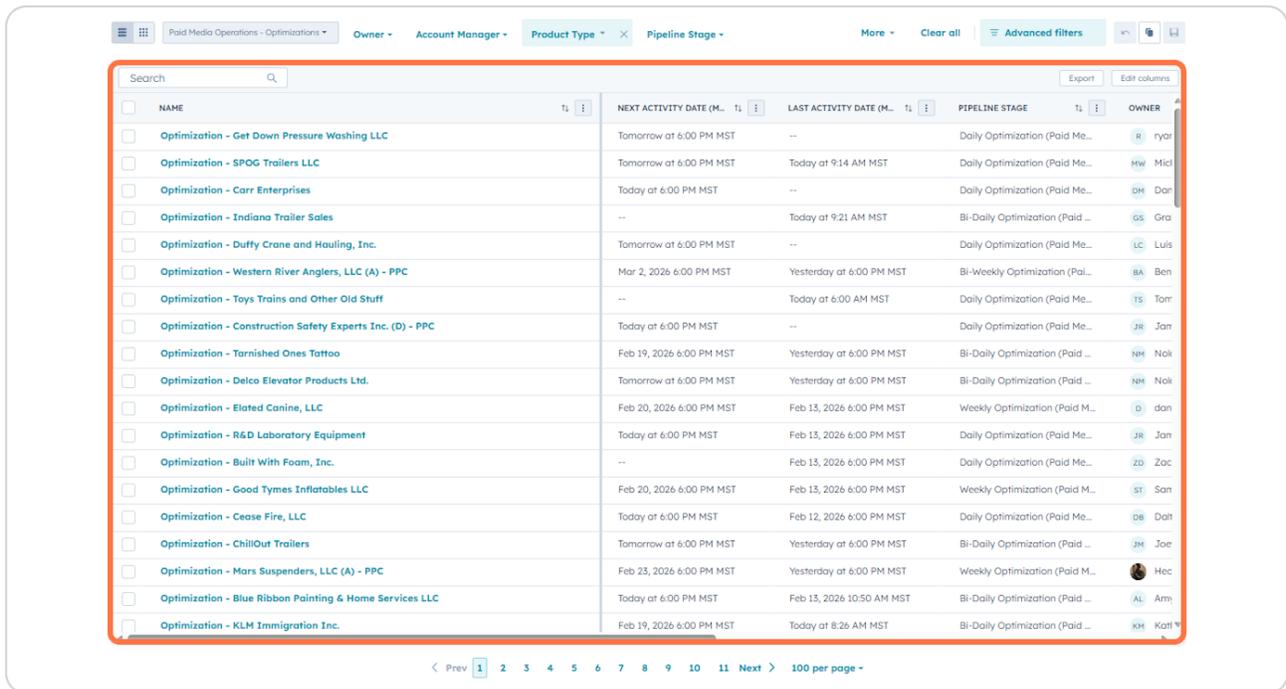
STEP 1

To access an Index view, select CRM > [Object Name]



STEP 2

The index view is the table (or Kanban) report that appears when the object first loads. This view is specific to the records within this object.

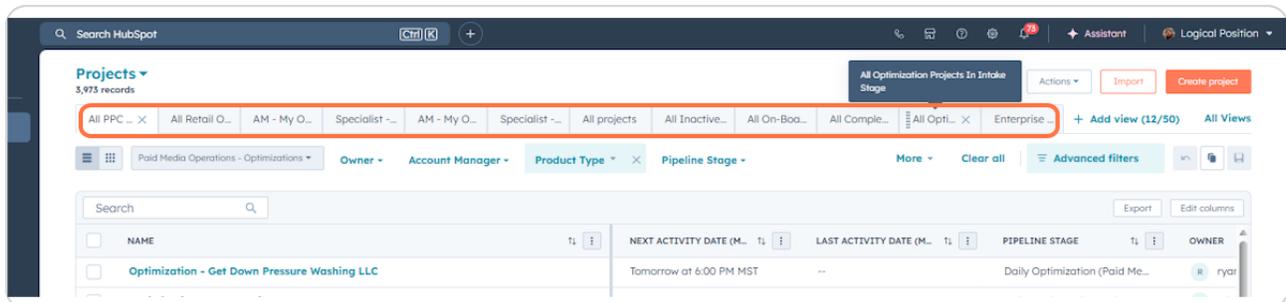


The screenshot shows a table view of optimization projects. The table has the following columns: NAME, NEXT ACTIVITY DATE (M...), LAST ACTIVITY DATE (M...), PIPELINE STAGE, and OWNER. The table contains 20 rows of data, each representing an optimization project. The first row is "Optimization - Get Down Pressure Washing LLC" with a next activity date of "Tomorrow at 6:00 PM MST" and a pipeline stage of "Daily Optimization (Paid Me...". The last row is "Optimization - KLM Immigration Inc." with a next activity date of "Feb 19, 2026 6:00 PM MST" and a pipeline stage of "Bi-Daily Optimization (Paid...".

NAME	NEXT ACTIVITY DATE (M...)	LAST ACTIVITY DATE (M...)	PIPELINE STAGE	OWNER
Optimization - Get Down Pressure Washing LLC	Tomorrow at 6:00 PM MST	--	Daily Optimization (Paid Me...	ryar
Optimization - SPOG Trailers LLC	Tomorrow at 6:00 PM MST	Today at 9:14 AM MST	Daily Optimization (Paid Me...	MW Miel
Optimization - Carr Enterprises	Today at 6:00 PM MST	--	Daily Optimization (Paid Me...	DM Dan
Optimization - Indiana Trailer Sales	--	Today at 9:21 AM MST	Bi-Daily Optimization (Paid ...	GS Gra
Optimization - Duffy Crane and Hauling, Inc.	Tomorrow at 6:00 PM MST	--	Daily Optimization (Paid Me...	LC Luis
Optimization - Western River Anglers, LLC (A) - PPC	Mar 2, 2026 6:00 PM MST	Yesterday at 6:00 PM MST	Bi-Weekly Optimization (Pal...	BA Ben
Optimization - Toys Trains and Other Old Stuff	--	Today at 6:00 AM MST	Daily Optimization (Paid Me...	TS Tom
Optimization - Construction Safety Experts Inc. (D) - PPC	Today at 6:00 PM MST	--	Daily Optimization (Paid Me...	JR Jan
Optimization - Tarnished Ones Tattoo	Feb 19, 2026 6:00 PM MST	Yesterday at 6:00 PM MST	Bi-Daily Optimization (Paid ...	NH Nok
Optimization - Delco Elevator Products Ltd.	Tomorrow at 6:00 PM MST	Yesterday at 6:00 PM MST	Bi-Daily Optimization (Paid ...	NH Nok
Optimization - Elated Canine, LLC	Feb 20, 2026 6:00 PM MST	Feb 13, 2026 6:00 PM MST	Weekly Optimization (Paid M...	D dan
Optimization - R&D Laboratory Equipment	Today at 6:00 PM MST	Feb 13, 2026 6:00 PM MST	Daily Optimization (Paid Me...	JR Jan
Optimization - Built With Foam, Inc.	--	Feb 13, 2026 6:00 PM MST	Daily Optimization (Paid Me...	ZD Zac
Optimization - Good Tymes Inflatables LLC	Feb 20, 2026 6:00 PM MST	Feb 13, 2026 6:00 PM MST	Weekly Optimization (Paid M...	ST San
Optimization - Cease Fire, LLC	Today at 6:00 PM MST	Feb 12, 2026 6:00 PM MST	Daily Optimization (Paid Me...	DE Dat
Optimization - ChillOut Trailers	Tomorrow at 6:00 PM MST	Yesterday at 6:00 PM MST	Bi-Daily Optimization (Paid ...	JM Joe
Optimization - Mars Suspenders, LLC (A) - PPC	Feb 23, 2026 6:00 PM MST	Yesterday at 6:00 PM MST	Weekly Optimization (Paid M...	Hec
Optimization - Blue Ribbon Painting & Home Services LLC	Today at 6:00 PM MST	Feb 13, 2026 10:50 AM MST	Bi-Daily Optimization (Paid ...	AL Arm
Optimization - KLM Immigration Inc.	Feb 19, 2026 6:00 PM MST	Today at 8:26 AM MST	Bi-Daily Optimization (Paid ...	KH Karl

STEP 3

You can navigate to different reports within the index views using the tabs at the top of the view.

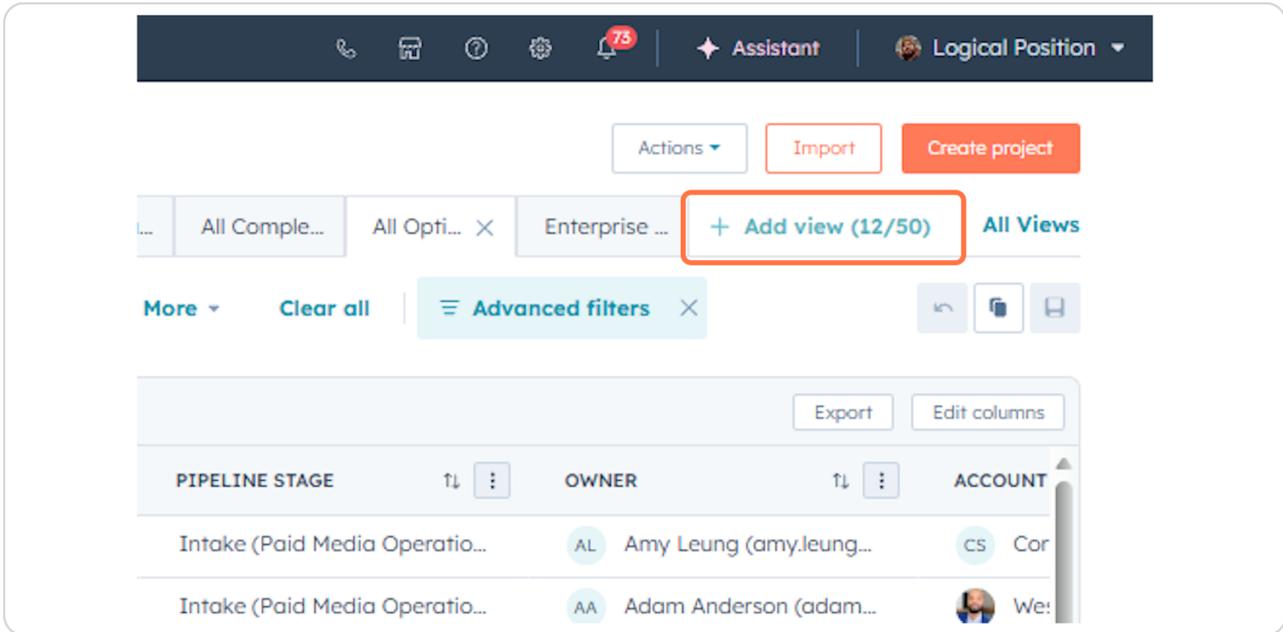


The screenshot shows a table view of optimization projects with a navigation bar at the top. The navigation bar contains several tabs: "All PPC", "All Retail O...", "AM - My O...", "Specialist ...", "AM - My O...", "Specialist ...", "All projects", "All Inactive...", "All On-Boa...", "All Comple...", "All Opt...", and "Enterprise...". The "All PPC" tab is currently selected. Below the navigation bar, there is a search bar and a table with columns: NAME, NEXT ACTIVITY DATE (M...), LAST ACTIVITY DATE (M...), PIPELINE STAGE, and OWNER. The first row of the table is "Optimization - Get Down Pressure Washing LLC" with a next activity date of "Tomorrow at 6:00 PM MST" and a pipeline stage of "Daily Optimization (Paid Me...".

NAME	NEXT ACTIVITY DATE (M...)	LAST ACTIVITY DATE (M...)	PIPELINE STAGE	OWNER
Optimization - Get Down Pressure Washing LLC	Tomorrow at 6:00 PM MST	--	Daily Optimization (Paid Me...	ryar

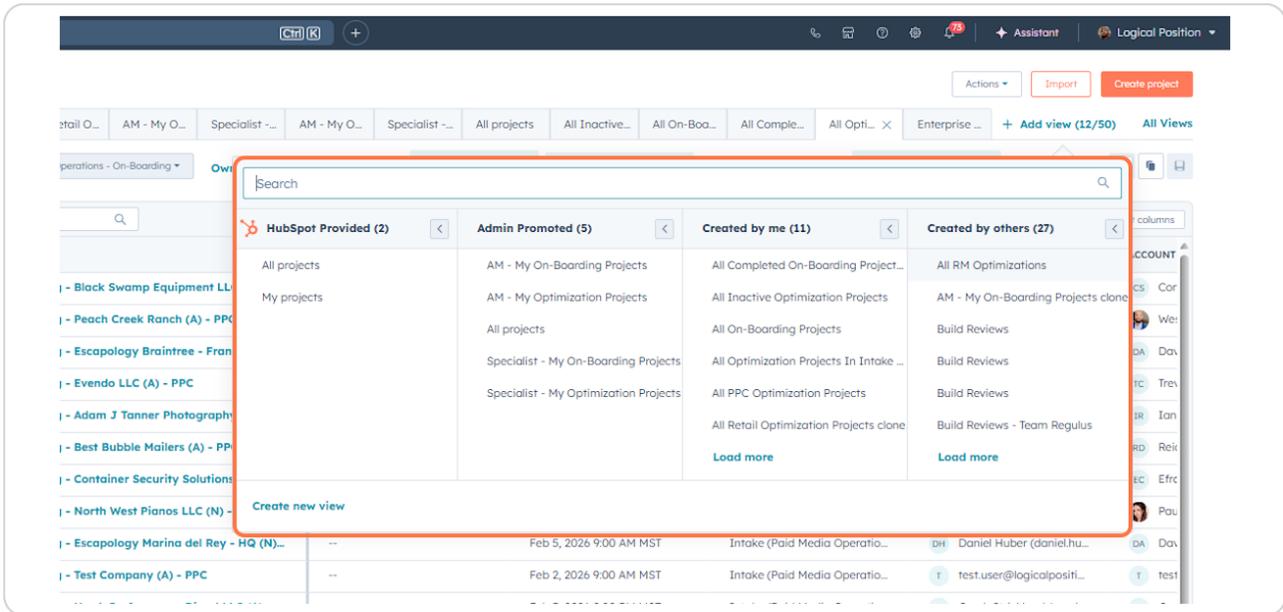
STEP 4

To add a report to your selection of tabs, select "+Add View (#/50)" on the right side of the screen.



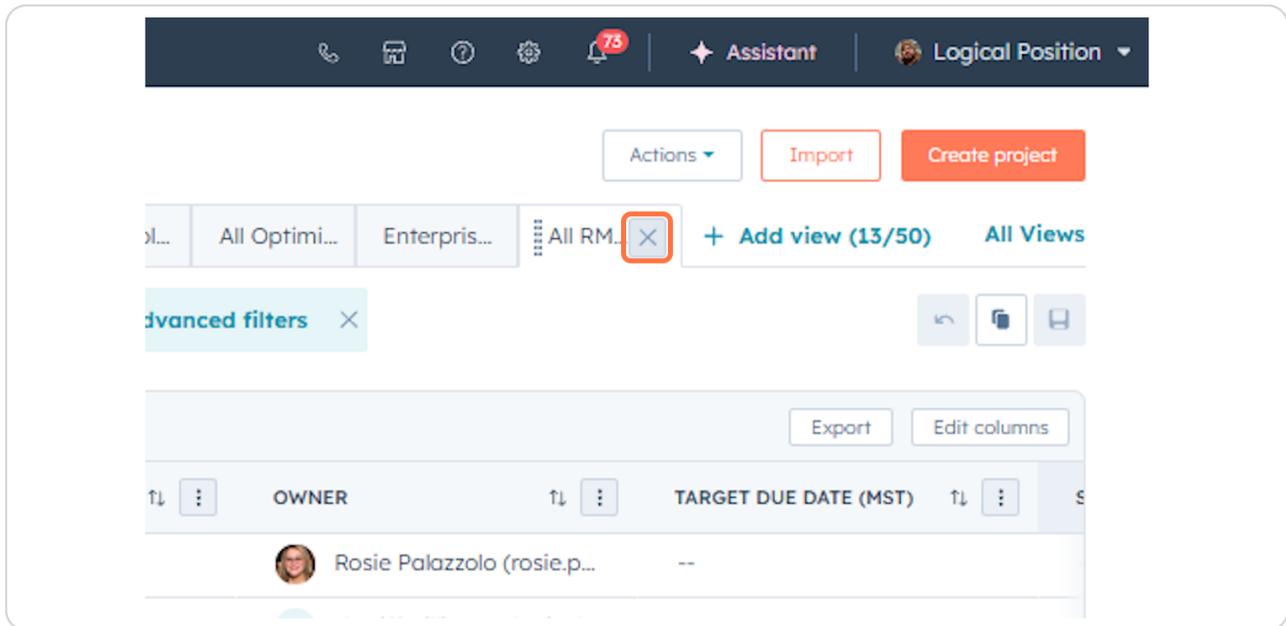
STEP 5

Select the view you would like to see in the dropdown menu. We can add new views to the Admin Promoted section based on your feedback.



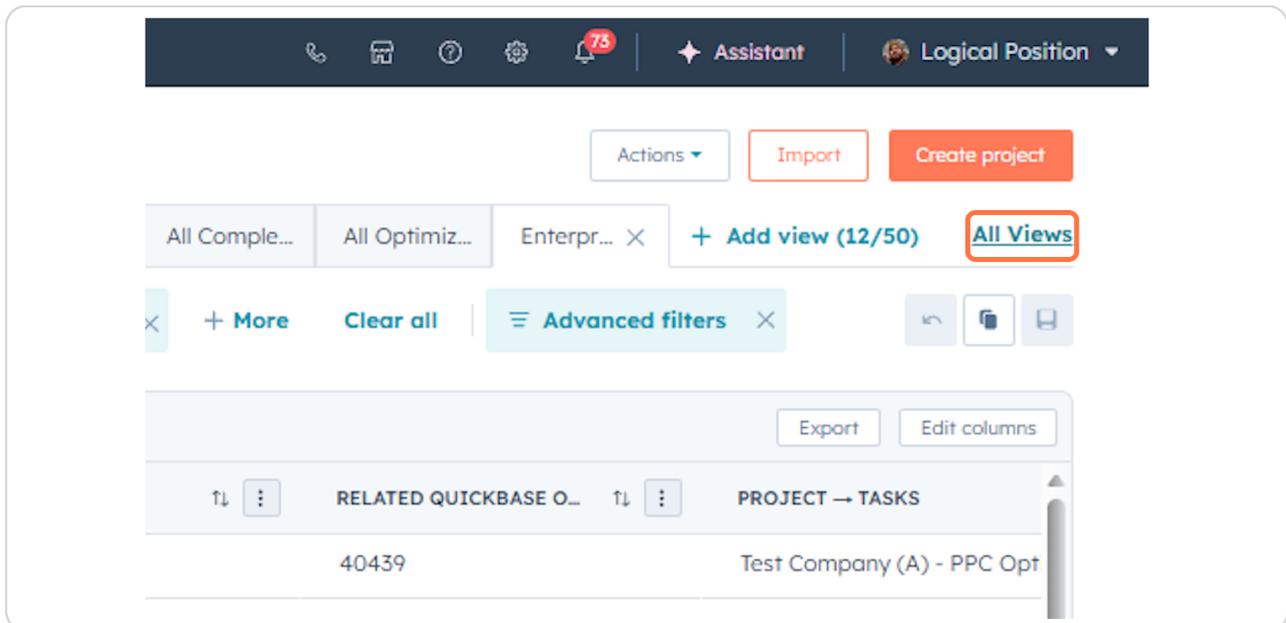
STEP 6

To remove a tab from the list, you can hit the "X" button on the tab. The tab will be selectable again in the "Add View" dropdown once removed.



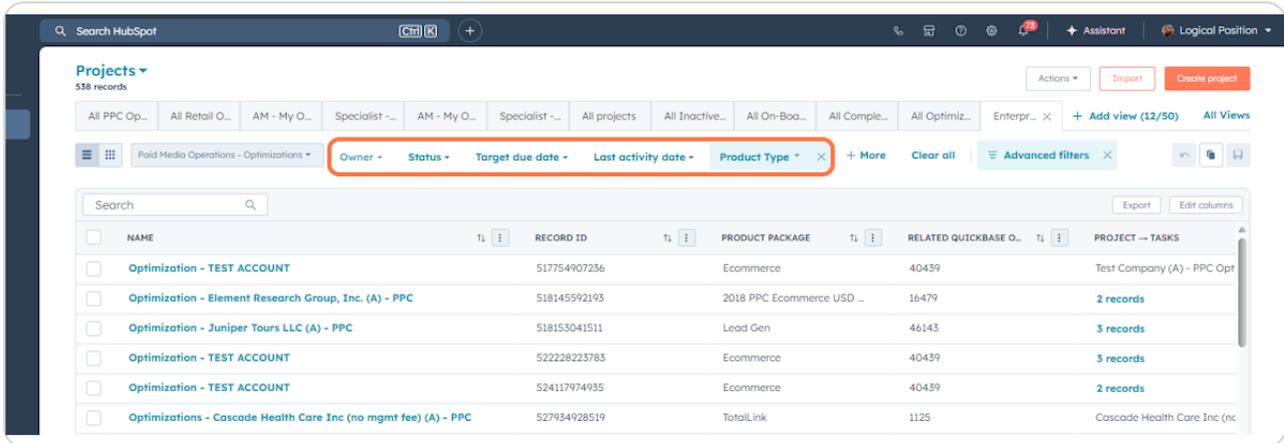
STEP 7

To get a list of all available views, select 'All Views' on the right side of the screen.



STEP 8

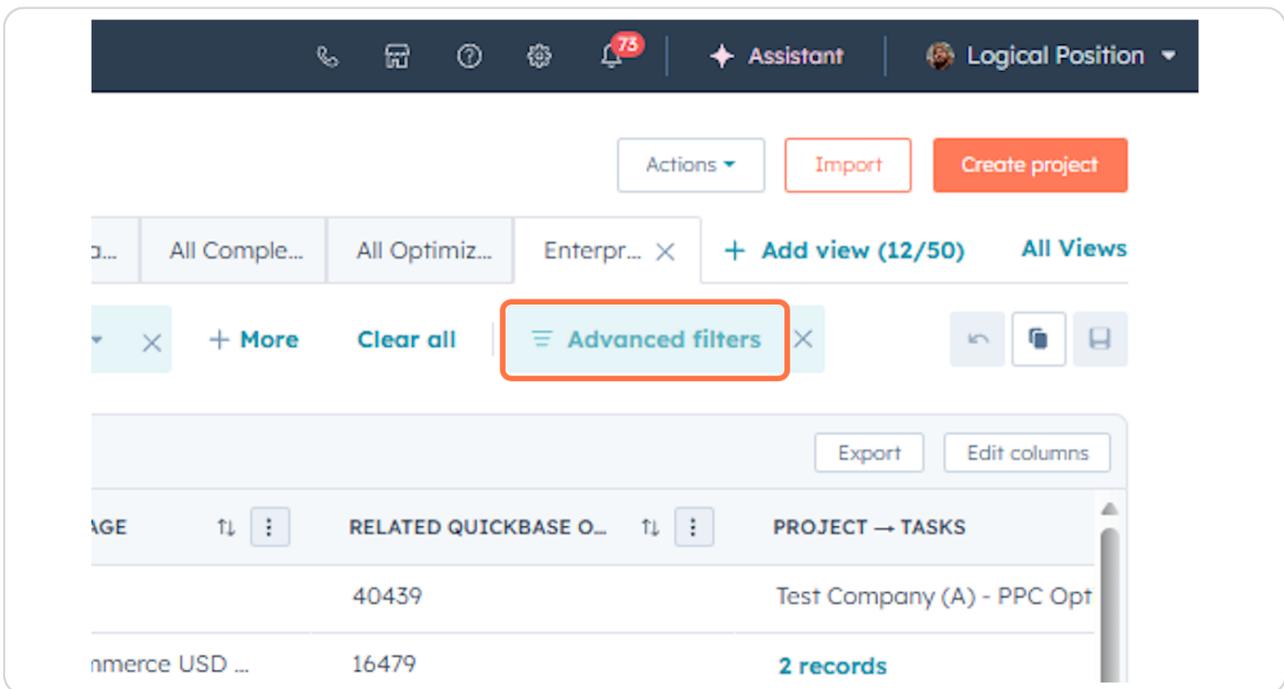
When looking at a view, you can add additional filters to the report by using the Quick Filter options above the columns.



The screenshot shows the HubSpot Projects interface. At the top, there are navigation icons and a search bar. Below that, there are buttons for 'Import' and 'Create project'. A row of view filters includes 'All PPC Op...', 'All Retail O...', 'AM - My O...', 'Specialist ...', 'AM - My O...', 'Specialist ...', 'All projects', 'All Inactive...', 'All On-Boo...', 'All Comple...', 'All Optimiz...', and 'Enterpr...'. A '+ Add view (12/50)' button and 'All Views' link are also present. Below the view filters, there is a 'Paid Media Operations - Optimizations' dropdown menu. A row of quick filters is highlighted with a red box, containing 'Owner', 'Status', 'Target due date', 'Last activity date', and 'Product Type'. To the right of these filters are '+ More', 'Clear all', and 'Advanced filters' buttons. Below the filters is a search bar and 'Export' and 'Edit columns' buttons. The main table has columns for 'NAME', 'RECORD ID', 'PRODUCT PACKAGE', 'RELATED QUICKBASE O...', and 'PROJECT → TASKS'. The table contains several rows of data, including 'Optimization - TEST ACCOUNT' and 'Optimization - Element Research Group, Inc. (A) - PPC'.

STEP 9

If the filter option you're looking for is not available as a Quick Filter, use the "Advanced Filters" option to add more complex additional logic.



The screenshot shows the HubSpot Projects interface, focusing on the filter options. At the top, there are navigation icons and a search bar. Below that, there are buttons for 'Import' and 'Create project'. A row of view filters includes 'All Comple...', 'All Optimiz...', and 'Enterpr...'. A '+ Add view (12/50)' button and 'All Views' link are also present. Below the view filters, there is a '+ More' button, 'Clear all', and 'Advanced filters' buttons. The 'Advanced filters' button is highlighted with a red box. Below the filters is a search bar and 'Export' and 'Edit columns' buttons. The main table has columns for 'NAME', 'RECORD ID', 'PRODUCT PACKAGE', 'RELATED QUICKBASE O...', and 'PROJECT → TASKS'. The table contains several rows of data, including 'Optimization - TEST ACCOUNT' and 'Optimization - Element Research Group, Inc. (A) - PPC'.

STEP 10

In Advanced filters, you can add "And" and "Or" conditions using any available property in the object.

The screenshot shows the HubSpot Advanced Filters interface. On the left, a table lists various filters. On the right, the 'Advanced Filters' panel is open, showing a filter rule for 'Specialist Division' set to 'is equal to any of enterprise'. Below this, there is a '+ Add filter' button highlighted with a red box, and an 'or' button and '+ Add filter group' button are also visible.

PACKAGE	RELATED
	40439
commerce USD ...	16479
	46143
	40439

STEP 11

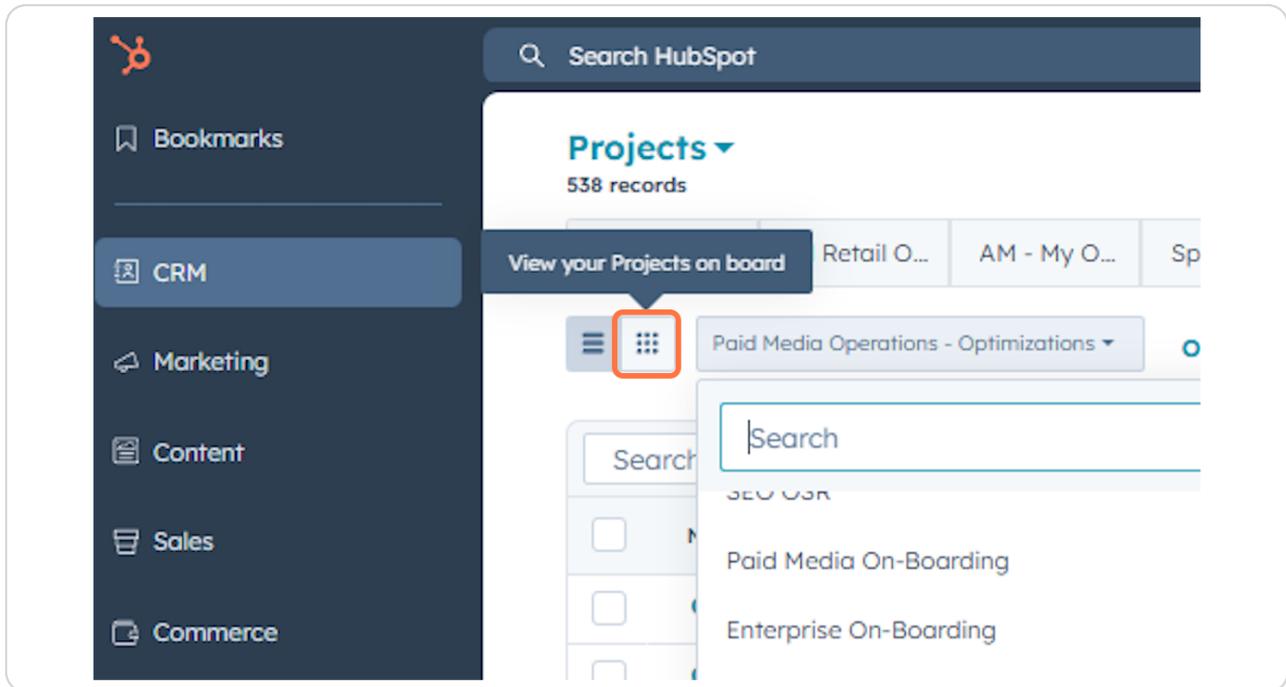
You can filter the Pipeline of the record using the dropdown above the Search bar (i.e. Optimization Projects vs. On-Boarding Projects)

The screenshot shows the HubSpot Projects page. The search bar is highlighted with a red box, and the dropdown menu is open, showing 'Paid Media Operations - Optimizations' selected. Below the search bar, a table lists various projects.

NAME	RELATED
Optimization - TEST ACCOUNT	E
Optimization - Element Research Group, Inc. (A) - PPC	E
Optimization - Juniper Tours LLC (A) - PPC	E
Optimization - TEST ACCOUNT	E
Optimization - TEST ACCOUNT	E

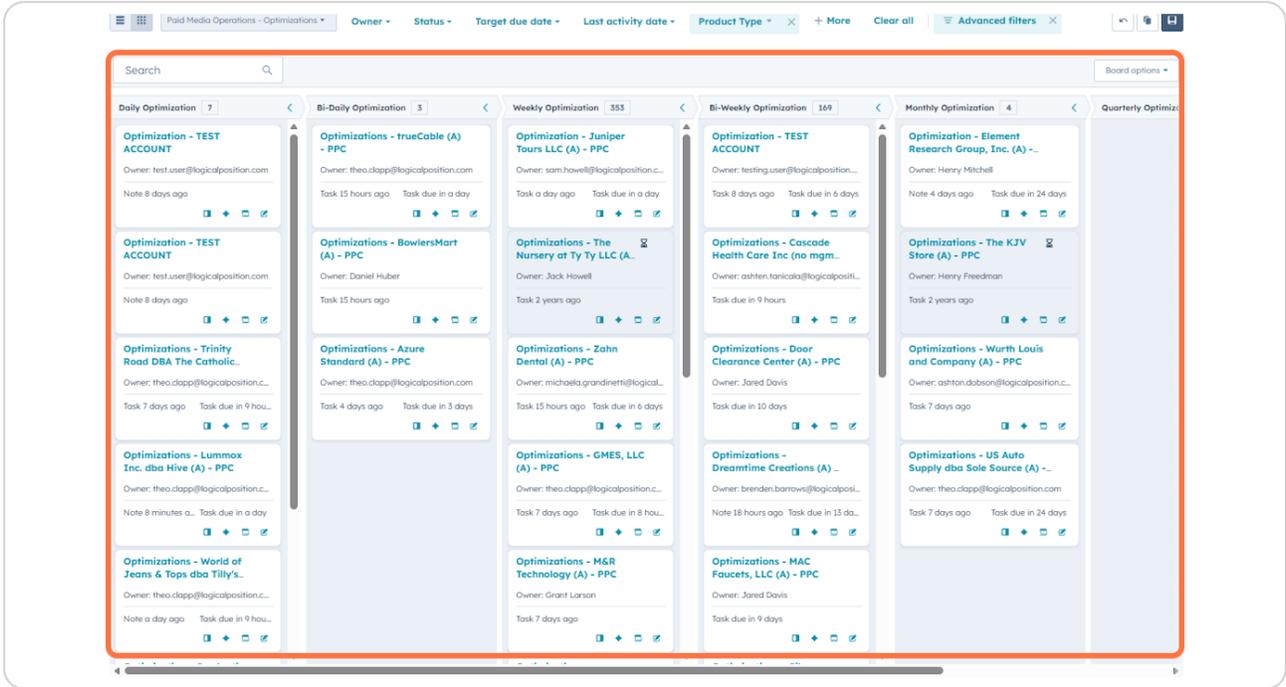
STEP 12

In addition to the traditional "Table Report" style that is the default for most index views, you can switch any report to be seen in a "Kanban" or "Board" view.



STEP 13

This view shows you filtered records in a card/column view. Records can be dragged between columns when necessary. This type of view is best for records that are undergoing a linear process and are filtered to a small subset (i.e. On-Boarding Projects or Change Request Tickets)

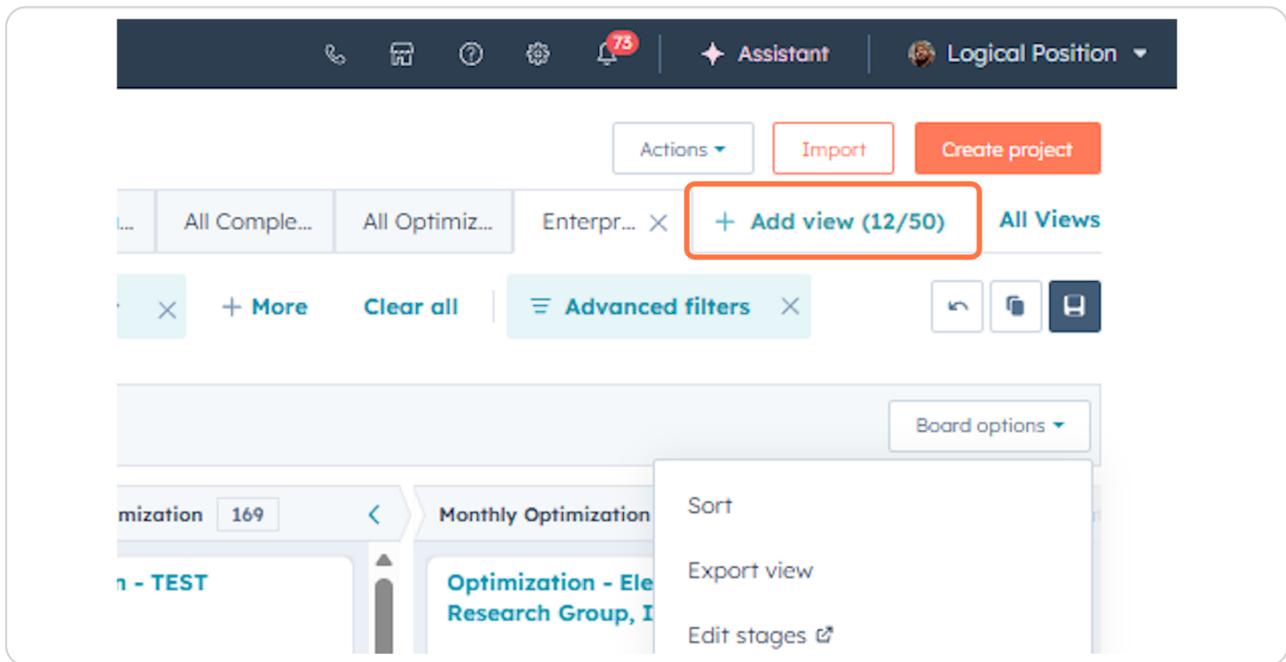


Creating New Views

14 Steps

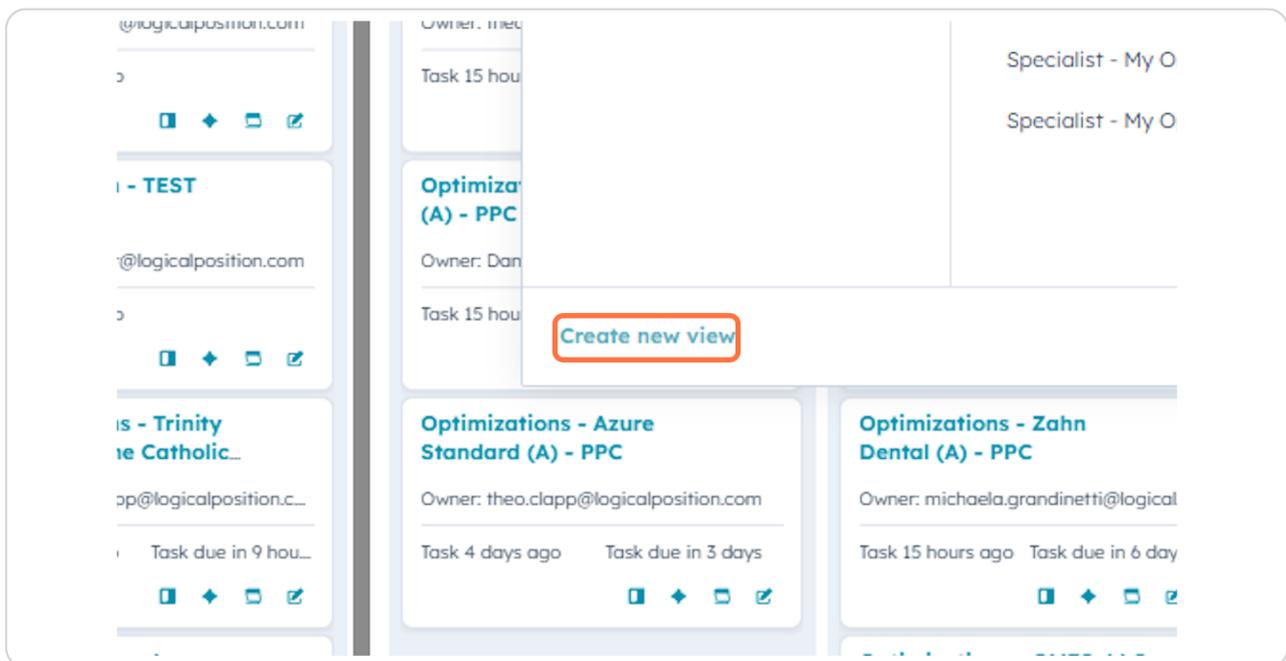
STEP 14

To create a new view, select the "Add View" dropdown



STEP 15

Select "Create New View" in the bottom left of the dropdown



STEP 16

You will be prompted to name your view and to determine the access level. You can make the view public to everyone, private to you, or only accessible to certain teams.

Create a saved view

Name *

Test View

Views created: 44 of 5,000

Access

Decide who has access to this view.

Private
Only you have access to this view.

Team:
Only you and members of the chosen team can access this view.

Everyone
Everyone on your HubSpot account can access this view.

Tristan Storr
tristan.storr@logicalposition.com
OWNER

All Logical Position users
1,081 users
VISITORS

Confirm Cancel

STEP 17

Click Confirm to create your view

Only you and members of the chosen team can access this view.

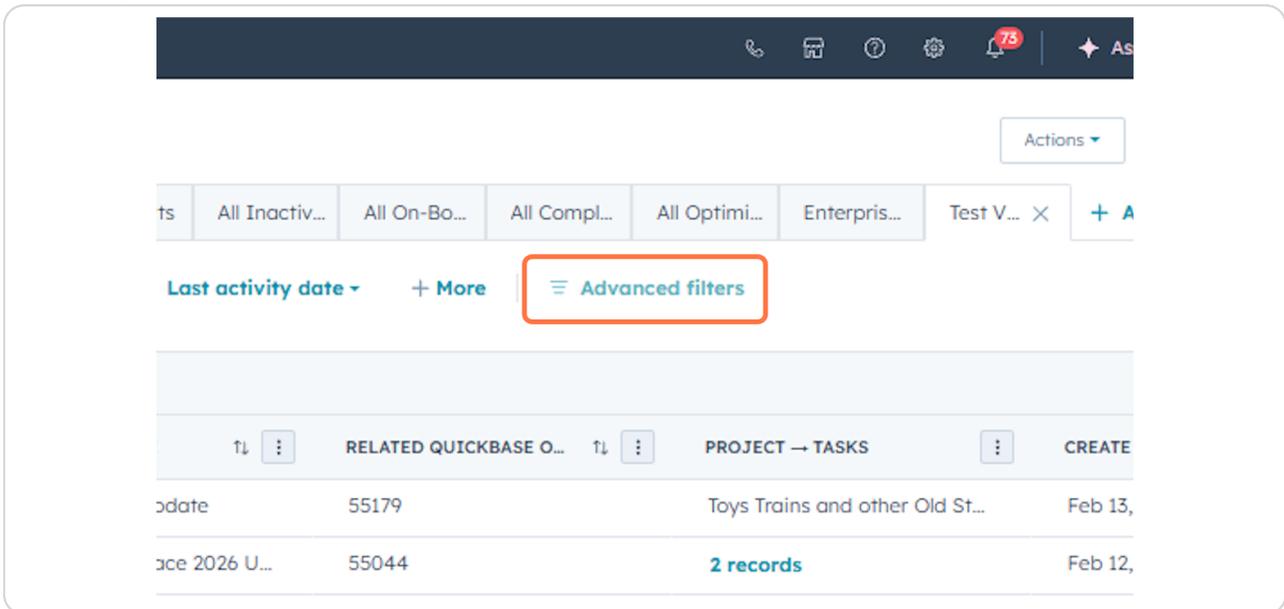
Everyone

Everyone on your HubSpot account can access this view.

Confirm Cancel

STEP 18

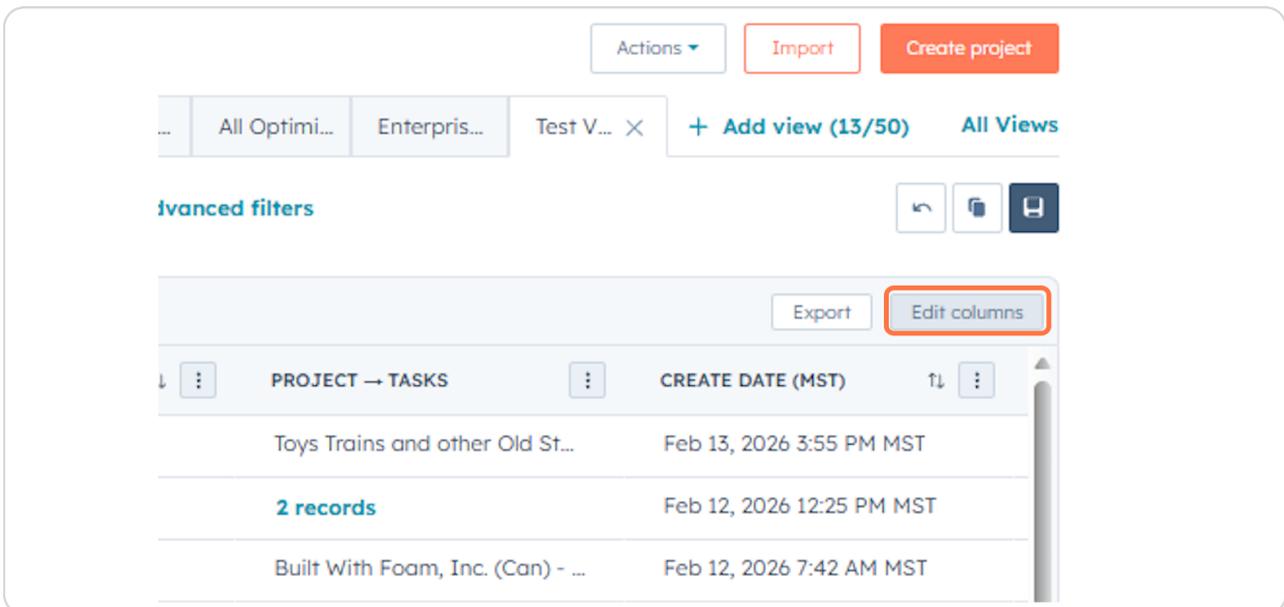
The next step is to setup the filters for your view. It is advised you do this through the "Advanced Filters" where you have access to more powerful filtering tools.



The screenshot shows a software interface with a table. At the top, there is a navigation bar with icons for phone, print, refresh, settings, and a notification bell with '73'. Below the navigation bar, there is a row of filter buttons: 'All Inactiv...', 'All On-Bo...', 'All Compl...', 'All Optimi...', 'Enterpris...', 'Test V...', and '+ A'. Below this row, there is a 'Last activity date' dropdown and a '+ More' button. The 'Advanced filters' button is highlighted with a red box. Below the filters, there is a table with columns: 'RELATED QUICKBASE O...', 'PROJECT -> TASKS', and 'CREATE DATE'. The table has two rows of data. The first row has '55179' and 'Toys Trains and other Old St...'. The second row has '55044' and '2 records'. The 'CREATE DATE' column shows 'Feb 13,' and 'Feb 12,'.

STEP 19

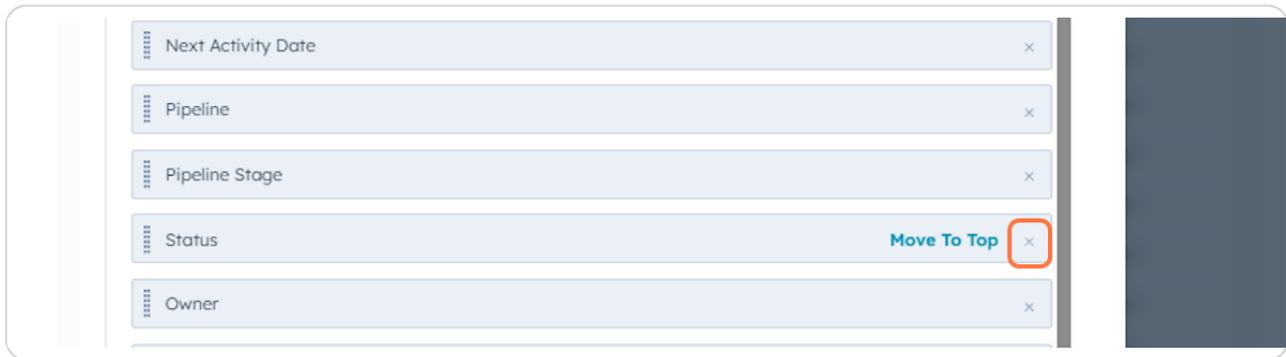
Click on 'Edit columns' in the top right to organize the data you see in the report.



The screenshot shows a software interface with a table. At the top, there is a navigation bar with icons for phone, print, refresh, settings, and a notification bell with '73'. Below the navigation bar, there is a row of filter buttons: 'All Optimi...', 'Enterpris...', 'Test V...', and '+ Add view (13/50)'. Below this row, there is an 'Advanced filters' section with a 'Reset' button, a 'Copy' button, and a 'Save' button. Below the filters, there is a table with columns: 'PROJECT -> TASKS' and 'CREATE DATE (MST)'. The table has two rows of data. The first row has 'Toys Trains and other Old St...' and 'Feb 13, 2026 3:55 PM MST'. The second row has '2 records' and 'Feb 12, 2026 12:25 PM MST'. The 'CREATE DATE (MST)' column shows 'Feb 12, 2026 7:42 AM MST'. The 'Edit columns' button is highlighted with a red box.

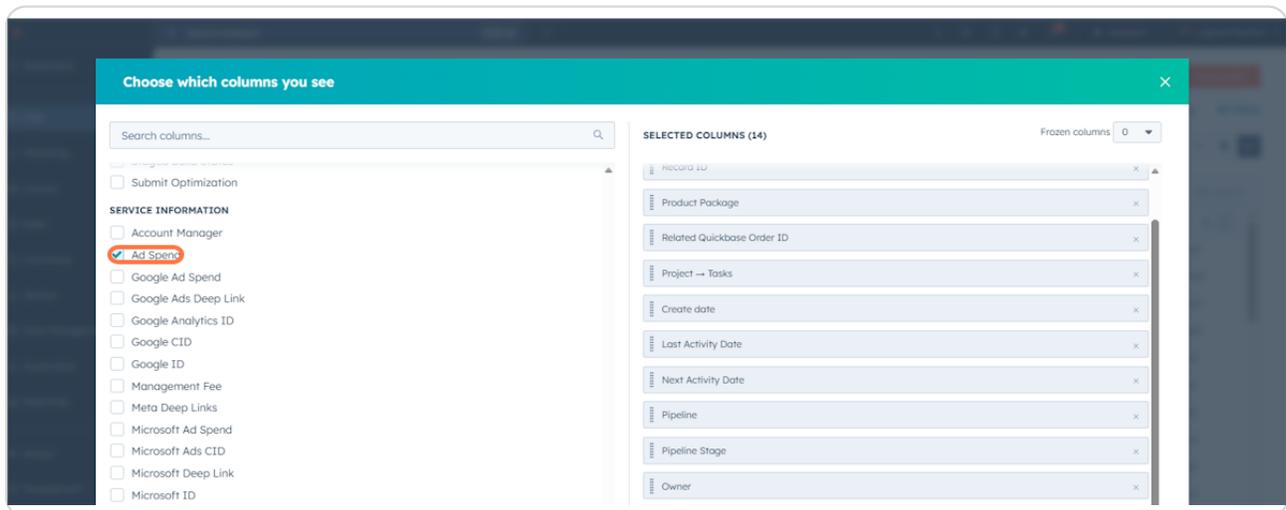
STEP 20

You can remove default columns using the "X" button



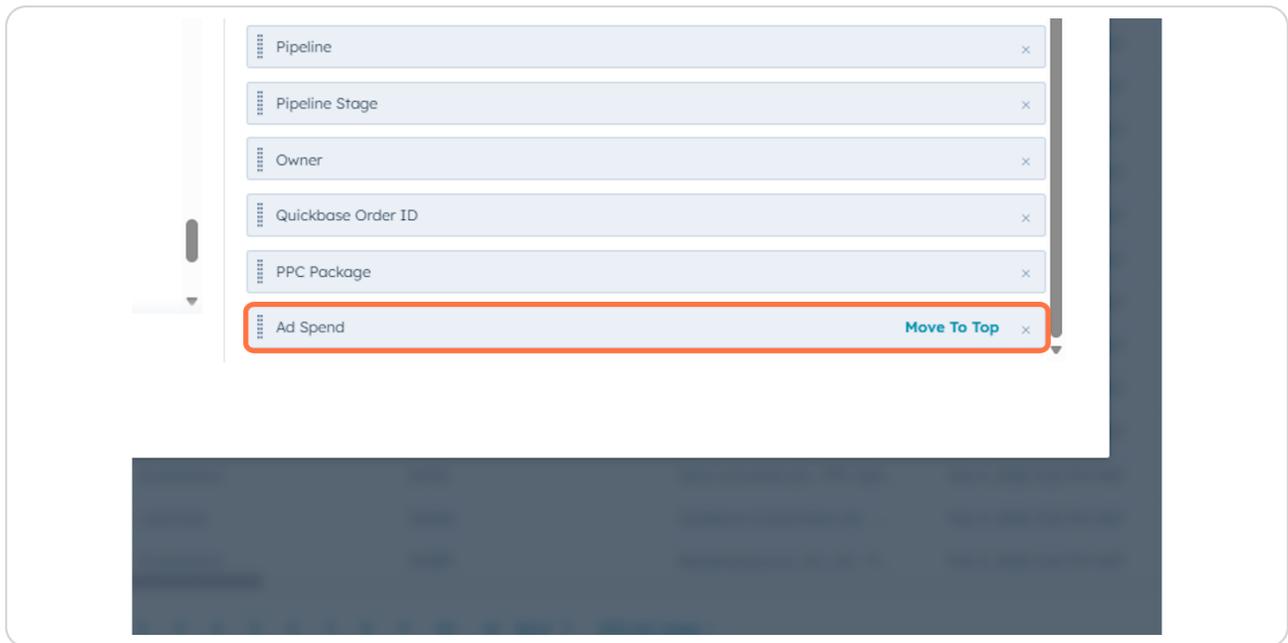
STEP 21

You can add new columns by selecting the property from the checklist on the left side of the menu.



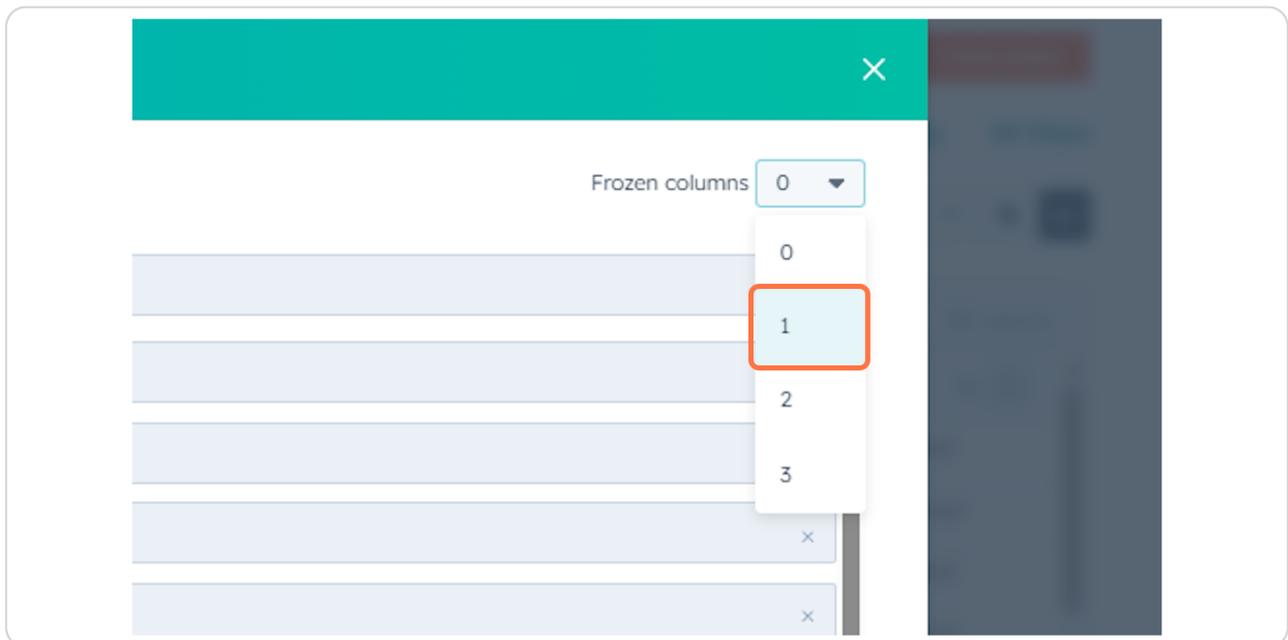
STEP 22

The column you just selected will slot into the bottom of the list. You can drag and drop this column anywhere in the list or select "Move to Top".



STEP 23

You can freeze columns in the report using the Frozen Columns dropdown



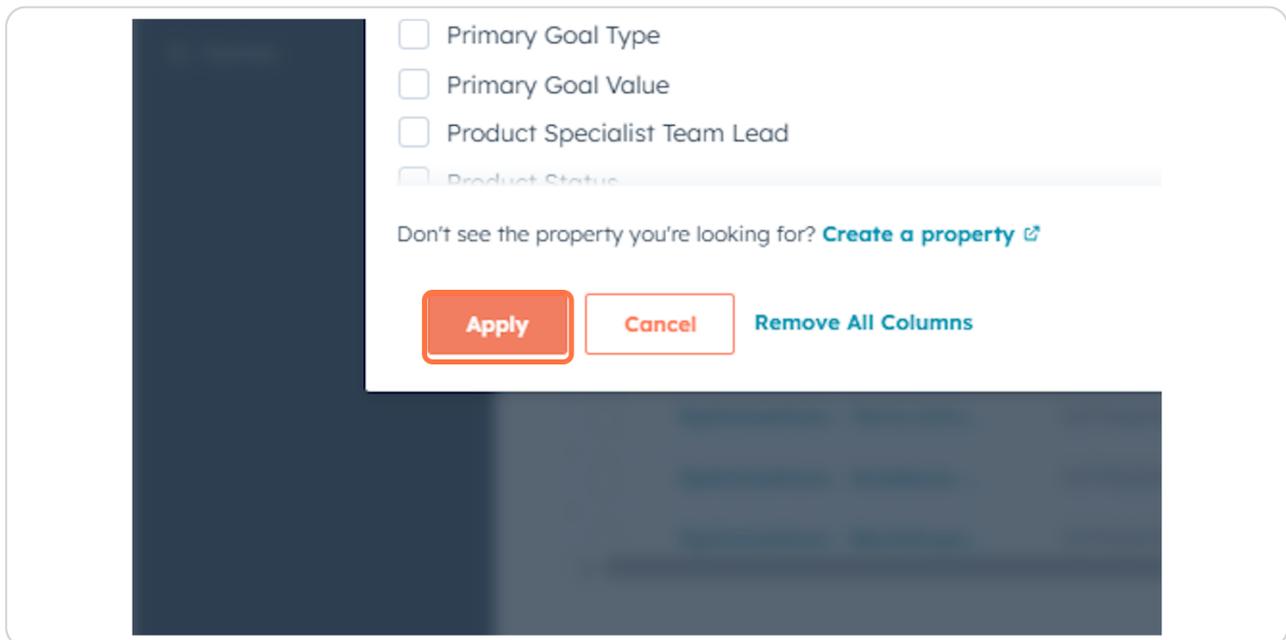
STEP 24

The top columns will become frozen, allowing them to always be visible as you scroll horizontally across the report.



STEP 25

Click on Apply to finish your column customization



STEP 26

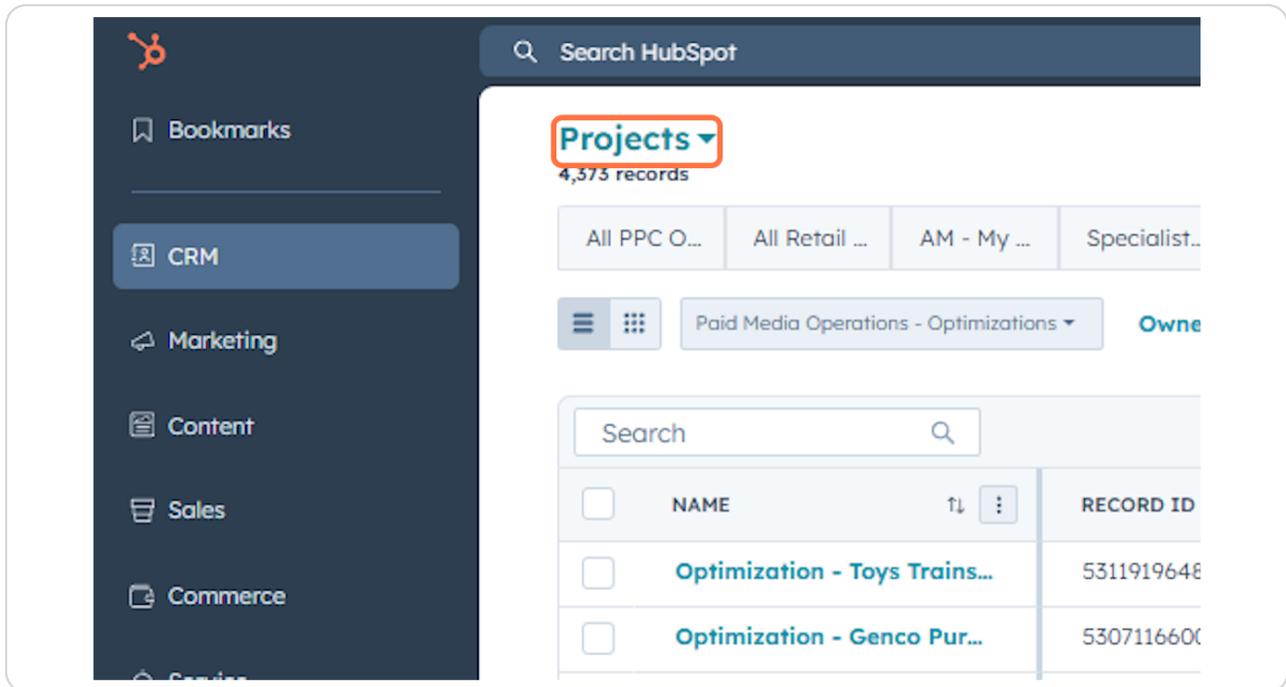
IMPORTANT: When adding filters or columns, it is very important to always save your edits using the "Save" icon in the top right. Any unsaved changes will revert when you leave the page.

The screenshot shows a software interface with a dark top navigation bar containing icons for phone, print, help, settings, and a notification bell with '75'. The main area has a toolbar with 'Actions', 'Import', and 'Create project' buttons. Below the toolbar are filter tabs: 'pl...', 'All Optimi...', 'Enterpris...', and 'Test V...'. A tooltip with the text 'Save now to keep your edits.' is positioned over a save icon (a floppy disk) in the 'Advanced filters' section. Below this is a table with columns 'PROJECT → TASKS' and 'CREATE DATE (MST)'. The table contains two rows of data and a '2 records' summary. Buttons for 'Export' and 'Edit columns' are visible above the table.

PROJECT → TASKS	CREATE DATE (MST)
Toys Trains and other Old St...	Feb 13, 2026 3:55 PM MST
	Feb 12, 2026 12:25 PM MST

STEP 27

To access other objects, you can go back to "CRM > [Object Name]" or you can select the Object Name just below the search bar. This dropdown will show you other object options you can navigate to.



The screenshot displays the HubSpot CRM interface. On the left is a dark sidebar with navigation options: Bookmarks, CRM (highlighted), Marketing, Content, Sales, and Commerce. The top right features a search bar labeled "Search HubSpot". Below the search bar, the "Projects" dropdown menu is open, showing "4,373 records" and several filter tabs: "All PPC O...", "All Retail ...", "AM - My ...", and "Specialist...". Below the filters, there are view toggles (list and grid) and a dropdown menu for "Paid Media Operations - Optimizations" with a "Own" button. A search input field is also present. The main content area shows a table with the following data:

<input type="checkbox"/>	NAME	RECORD ID
<input type="checkbox"/>	Optimization - Toys Trains...	5311919648
<input type="checkbox"/>	Optimization - Genco Pur...	5307116600

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