



TIPS & HINTS FOR CUSTOM VIEWS

Summary


List views give you instant access to specific sets of data. In addition to using the existing views, you can easily create custom views for the items most relevant to you.

Common Views

- Contacts sorted by Industry
- Leads sorted by Source
- Accounts sorted by State
- Accounts sorted by Product Type
- Completed Tasks—criteria “Closed equals True”
- Last Updated Accounts—“Last Update greater than last week”

Creating a List View

To create a custom view, choose the **Create New View** link from any tab home page or list page. For activity list views, go to the home tab and click the list view icon below the calendar; then choose the **Create New View** link.

1. Enter a **View Name**. This name will then appear on the drop-down list.
 2. Specify the filter criteria, such as records owned by you or all records.
 3. Optionally, limit the data using search criteria. For example, “Probability greater than 20%” eliminates items with probability less than or equal to 20%.
 - Choose a field by which you want to limit the results.
 - Choose an operator from the second drop-down list.
 - In the last field, enter a search term.
 4. Choose the custom or standard fields you want to show in your view.
 5. Administrators and users with the “Manage Public List Views” permission can set the visibility to make the view available to specific groups or roles.
 6. Click **Save**.
 - Each search criteria relates to the others with an AND operator. If you specify multiple criteria, the resulting view includes items that match all criteria.
 - To use an OR filter, enter up to 10 items separated by commas, in the third field, such as “State contains CA, NY”. Use quotation marks for data that includes commas. For example, “10,000”, “5,000” searches for 10,000 or 5,000.
 - You cannot create list views within the Console tab, but you can view the list views defined on the tabs of other objects.
-  **Tip:** Once you have created your view, click any column heading to sort by the data in that particular column. Click the heading again to reverse sort.

Special Values for Limiting Your View

When entering search criteria for list views or reports, use one of the following picklist values as the field, choose the equals operator, and enter the value True or False.

For example, "Converted equals True" finds converted leads.

Limiting by Date

- You can enter relative date values to base the view on dates, such as "Create Date equals last week."
- Valid date values are: today, tomorrow, yesterday, this week, next week, last week, last 90 days, next 90 days, this month, next month, and last month.

Excluding Blank Values

- You can exclude any records that contain blank values for a particular field.
- Choose the field and the "does not equal" operator; leave the value blank.

Online Help

- See the online help for more special picklists you can use in your list views.

Activities

- All-day: True for all day events; false for events with a specific time
- Closed: True for closed tasks; false for tasks still open
- Task: True for tasks; false for events

Campaigns

Active: True for active; false for inactive

Cases

- Closed: True for closed cases; false for open cases
- Escalated: True for escalated cases; false for cases that are not escalated
- New Self-Service Comment: True for case has a new comment added by a Self-Service user; false for no new comments
- Self-Service Commented: True for case has comments added by Self-Service users; false for no comments

Contacts

Email Opt Out: True for cannot receive mass email; false for can receive

Leads

- Email Opt Out: True for cannot receive mass email; false for can receive
- Unread: True for unread leads; false for viewed or edited leads

Opportunities

- Closed: True for closed opportunities; false for open opportunities
- Private: True for private opportunities; false for those not marked private
- Won: True for won opportunities; false for those closed/lost or open

Solutions

Reviewed: True for reviewed solutions; false for those not reviewed