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Salesforce List Views [1]

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List Views provides a way for users to quickly view a segment of data in Salesforce. At eComm, List Views are most commonly used when viewing Campaigns (including event participation), Email Sends and Contacts. They can help you keep a pulse on your efforts by answering questions such as, 'what are my active events?' or 'what emails went out this week?'.

LIST VIEWS VS. REPORTS While a Report can capture similar information, there are reasons to use one over the other. eComm users appreciate List Views because they can create them on their own (where only eComm specialist can create Reports). While it's great for getting a pulse on your work, it's important to note, you can't send a Marketing Cloud email to a List View.

How-to Create your own List Views

1. Click **List View Controls** in the top right, with the gear icon. Select one of the first two options: **New** or **Clone**
2. Name your List View
3. Leave the default radio button checked to: **Only I can see this list view**
4. Select **Save**
5. Customize your List View by modifying the:
    - Filter Logic: Click **List View Controls** in the top right (gear icon). Select **Edit List Filter** from the dropdown. The filter logic will appear as a pane in the left. Edit by clicking **Add Filter** until you have created the desired query.
    - Columns: Click **List View Controls** in the top right (gear icon). Click **Select Fields to Display** from the dropdown. Add and remove field names to the **Visible Fields** box on the right-hand side. Click **Save**

Switch Between Different Salesforce List Views

You can create many different List Views to see different infomation (All Active Events vs. All Passed Events for example). Once a List View is saved it's easy to navigate back and forth between them.

NAVIGATE TO THE OBJECT Navigate to the object that you wish to create a List View for. At eComm, we typically use List Views for Campaigns (for event participation), Email Sends or Contacts.

1. The List View name will be indicated in the top-left

2. Just to the right of the List View name, select the **down arrow** for a list all saved List Views
3. Select the different List View that you wish to display

Pin a Salesforce List Views

Pin a List View to control what displays by default. For me, it's whatever List View will answer the questions I most commonely ask. It's a great way to quickly get a pulse of your work.

1. The List View name will be indicated in the top-left
2. Just to the right of the List View name, click the **pin icon**
3. This will force that particular List View to display by default

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