salesforce User Guide

Customer Relationship Management Software

Learn how to ...

Create and customize views
Create unique views and customize them to your business needs.

Create reports
Generate your first Salesforce report.

Create campaigns
Set up your first Salesforce campaign.

Create opportunities
Create opportunities, leads, convert contacts and more.

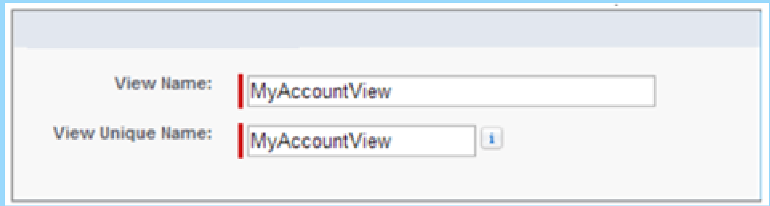
Create a Custom List View

Create a list view to see a specific set of contacts, documents, or other object records.

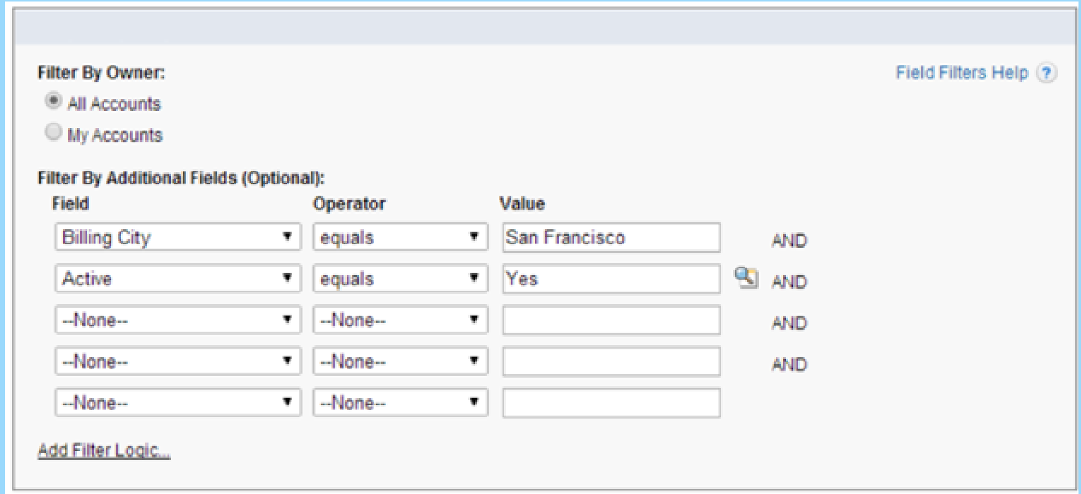
For Example: Create views of contacts, leads, users, or cases for mass email recipient lists.

Try it: Create a list view of accounts in your state, leads with a specific lead source, or opportunities above a specific dollar amount.

1. Click **Create New View** at the top of any list page or in the Views section of any tab home page.
2. Enter the view name. The view name displays in the **Views** dropdown list.
3. Enter a unique view name. The API and managed packages utilize this unique name. The unique name must be new in both public and private list views.
   Note: Private list views are only searchable if you have access to them.



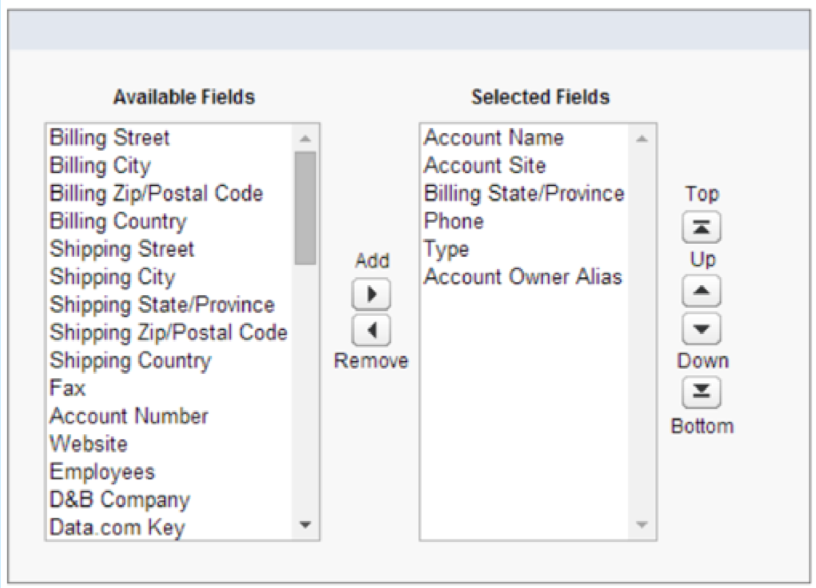
4. Specify your filter criteria. You can have up to 10 fields in your filter criteria. If you want more filter fields, click **Add Filter Logic...** and then **Add Row**.



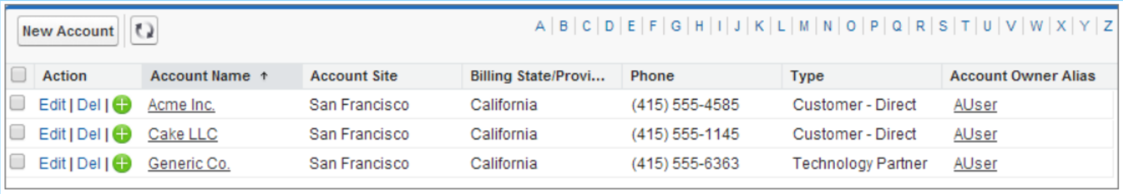
This image shows a list view that displays only active accounts with the Billing City of “San Francisco.”

USER TIP: You can hide the list view so only you can see it or make it visible to only a specific set of users. Click **Edit** next to the list view name. Select **Visible to certain groups of users**. Choose the type of group or role from the dropdown list. Then, select the group or role from the list and click **Add**.

5. Select the fields you want to display on the list view. The default fields are automatically selected from the fields that are in your page layout. You can display up to 15 different fields in your view.



6. Click **Save**. The view appears in the View dropdown list so you can access it later.



Action	Account Name ↑	Account Site	Billing State/Provi...	Phone	Type	Account Owner Alias
Edit | Del |	Acme Inc.	San Francisco	California	(415) 555-4585	Customer - Direct	AUser
Edit | Del |	Cake LLC	San Francisco	California	(415) 555-1145	Customer - Direct	AUser
Edit | Del |	Generic Co.	San Francisco	California	(415) 555-6363	Technology Partner	AUser