

# A2110 - Listviews

## Overview

Listviews are a key feature in Convergence and in Salesforce more generally. Listviews display a list of records for a given object, for example : all your Visit Minutes.

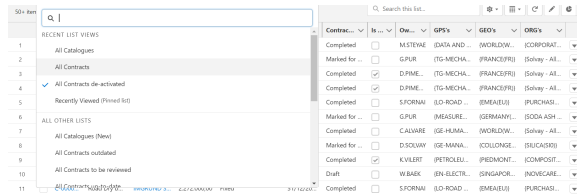
## Table of content

- [Where are Listviews ?](#)
- [General navigation](#)
- [Customize Listviews](#)
- [Related articles](#)
- [Need help](#)
- [How to ask for assistance?](#)

## Where are Listviews ?

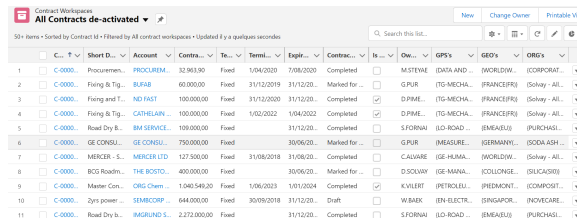
Listviews are accessible on any tab. Just click on one tab and choose which Listview you want to display.

In this example, the tab "Contract Workspaces" is open and the Listview "All Contracts de-activated" is selected.



Click on the Listview to display it.

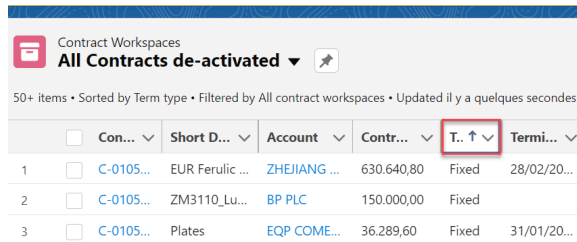
In this example, the displayed Listview is "All Contracts de-activated".



## General navigation

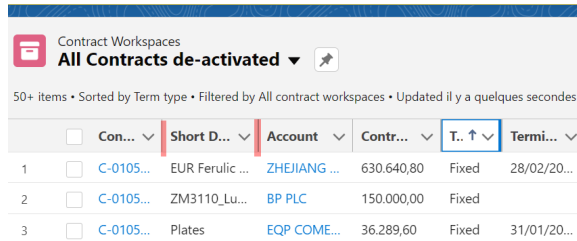
To **sort** a Listview, just click on any column header.

In this example, the Listview is sorted showing the fixed contract first (notice the black arrow in the column header).



Feel free to **resize** any column by moving the column header left or right border. The new size of the column will remain, but only for your Salesforce account.

[blocked URL](#)



Feel also free to **move** a column from one place to another. This will remain for your Salesforce account only.

All expired CSR within next 12 month | Clone | Create New View

New CSR Assessment

Action	Flag	Account	CSR ID
Edit   Del		FARMONT SUPPLY COMPANY	CSR-00000483
Edit   Del		HILLENBRAND, INC. (INCL COOPERION GMBH)	CSR-00000474
Edit   Del		KEM ONE FRANCE	CSR-00000492
Edit   Del		SMITHS GROUP PLC (INCL JOHN CRANE)	CSR-00000495

All expired CSR within next 12 month | Clone | Create New View

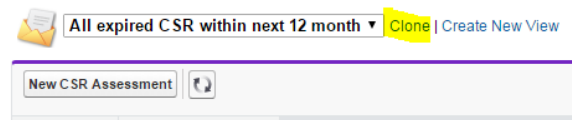
New CSR Assessment

Action	Flag	Account	CSR ID
Edit   Del		FARMONT SUPPLY COMPANY	CSR-00000483
Edit   Del		HILLENBRAND, INC. (INCL COOPERION GMBH)	CSR-00000474
Edit   Del		KEM ONE FRANCE	CSR-00000492
Edit   Del		SMITHS GROUP PLC (INCL JOHN CRANE)	CSR-00000495

## Customize Listviews

Fell free to clone any Listview to customize it.

Click on the clone button of any Listview



Choose a new name for you cloned view

CSR Assessments Edit View

Save As | Cancel

Step 1. Enter View Name

View Name:

Created By: Vincent.Vardelle@ast 9/9/2016 1:05 AM Modified By: Vincent.Vardelle@ast 9/9/2016 1:10 AM

Customize the **criteria** and the **logic filter** of the view.

The easiest criteria to change is the toggle button "All CSR Assessments" / "My CSR Assessments".

Logic filter works as follows :

- **AND**, finds records that match both values.

1 AND 2

- **OR**, finds records that match either value.

1 OR 2

- **NOT**, finds records that exclude values.

Step 2. Specify Filter Criteria

Filter By Owner:  All CSR Assessments  My CSR Assessments [Field Filters Help](#)

Filter By Additional Fields (Optional):

Field	Operator	Value
1. CSR ID	contains	CSR:
2. Status	equals	Completed
3. Is Active	equals	True
4. Valid To	equals	NEXT 365 DAYS
5. [None]	[None]	

Clear Filter Logic

Filter Logic:  [Top](#)

Change the displayed fields (on the right). To add a field, chose it on the left and put it on the right. To remove one, take it from the right and put it on the left. Change columns display order on the right side.

Then save you view.

Step 3. Select Fields to Display

Available Fields	Selected Fields
Record ID	Flag
1_1	Account
1_10	CSR ID
1_11	CSR Assessor Name
1_11_1	Status
1_12	Is Active
1_13	Valid To
1_14	Overall result
1_15	Created Date
1_16	Created By
1_17	
1_17_1	
1_18	
1_19	
1_2	

Add Remove

Top Up Down Bottom

Save As Cancel

## Related articles

- [B - Salesforce terminology](#)

## Need help

### How to ask for assistance?

Dear Salesforce Convergence user,

For any question or issue regarding Convergence, please :

- create a request in **Service One** with the following information:
  - I want to update data in Convergence [Maintain data ownership in CONVERGENCE](#)
  - I want to mass upload procurement data [Maintain procurement data in CONVERGENCE](#)
  - Process : Data & Analysis
  - PTP-Subprocess: Purchasing Tools Support
  - PTP-Category: Convergence

For account creation, please refer to [here](#).

Thank you very much,

[Convergence Team](#).