

Webforms - Appendix

In this section, you will find information about:

- how to create new list views

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Step-By-Step

List Views

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The screenshot shows the Salesforce interface for the 'Cases' list view. A dropdown menu is open, showing options for filtering the list view. The options include: 'All Open Complaints', 'Account Update Request', 'All Open Complaints (Corporate Segmentation Change Request)', 'My Complaints', 'My Open Complaints', 'New End Use Requests', and 'Recently Viewed Cases'. The 'Recently Viewed Cases' option is highlighted. The main table below shows a list of cases with columns for Case ID, Subject, Contact Name, Product Family, Severity, Status, and Date/Time Opened.

Case	Subject	Contact Name	Product Family	Severity	Status	Date/Time Opened
00001145		Test Contact_CG		Minor	Acknowledgment Sent	14/05/2015 9:58
00001145				Minor	Approval Pending	7/08/2015 10:22
00001145				Minor	Approval Pending	6/07/2015 9:44
00001145				Minor	Approved	6/08/2015 14:02
00001145	Life Delivery	Smith, John		Minor	Acknowledgment Sent	31/07/2015 13:53
00001145		Smith, John		Minor	Closed	4/08/2015 10:43
00001145		Smith, John		Critical	Under Review	3/08/2015 12:54
00001145		Smith, John		Anomaly	Closed	3/08/2015 10:52
00001145	Material stored and transported in double stacking	Test Contact_CG		Critical	New	16/07/2015 9:56
00001145	BAF5_BChris62@EINE GmbH	Wank, John		Minor	New	3/08/2015 10:41
00001145	Subject	Wank, John		Minor	Under Investigation	2/04/2015 9:51
00001145	Problem on boards during transportation	Test Contact_CG		Minor	Customer Informed	13/05/2015 14:42
00001145				Minor	Approved	25/07/2015 19:46
00001145				Minor	Approved	28/07/2015 16:46
00001145	Low Ash content issue on A218/25 (no/21)	Test Contact_CG		Major	New	31/07/2015 11:18
00001145	Life Delivery of goods	Test Contact_CG		Minor	Under Investigation	11/05/2015 10:07
00001145	Production Issue	Lambert, James		Anomaly	Customer Informed	13/05/2015 14:16
00001145	Block stack complaint	000001_00000	H2O2 Disfilled grades	Minor	Closed	6/07

Creating Views

Additional, the user can create his own personal views by clicking views by clicking on the "Create New View" link

The screenshot shows the Salesforce 'Cases' Home page. At the top, there is a navigation bar with 'Home', 'Chatter', 'Accounts', 'Contacts', 'Activities', 'Visit Reports', 'Account Plans', 'Cases', 'Opportunities', 'Competitive Insights', 'Cross BU Leads', 'Analytics', and 'Market Segment'. Below this, there is a 'Create New...' dropdown and a 'Home' section. A dropdown menu is open, showing options like 'All Open Complaints', 'All Open Complaints', 'Corporate Segmentation Change Request', 'My Complaints', 'My Open Complaints', 'New End User Requests', and 'Recently Viewed Cases'. The 'Create New View' button is highlighted in red. Below the dropdown, there is a table of cases with columns: Case, Subject, Contact Name, Product Family, Severity, Status, and Date/Time Opened.

Case	Subject	Contact Name	Product Family	Severity	Status	Date/Time Opened
00000618		Test Contact_CG		Minor	Acknowledgment Sent	14/05/2015 9:58
00001145				Minor	Approval Pending	7/08/2015 10:22
00001145				Minor	Approval Pending	6/07/2015 9:44
00001145				Minor	Approved	6/08/2015 14:52
00003341	Test case CG	Lila Delaviz	Smith John	Minor	Acknowledgment Sent	31/07/2015 13:53
00003832	Test case CG		Smith John	Minor	Closed	4/08/2015 10:43
00003879	Test case CG		Smith John	Critical	Under Review	3/08/2015 12:54
00003836	Test case CG		Smith John	Anomaly	Closed	3/08/2015 10:52
00001234	Test case CG	Material stored and transported in double stacking	Test Contact_CG	Critical	New	16/07/2015 9:56
00002834	Buyer's Choice 62/10/14/14/14		Wank John	Minor	New	3/08/2015 10:41
00001021	Buyer	Buyer	Wank John	Minor	Under Investigation	2/04/2015 9:51
00001060	Test case CG	Problem on website during transportation	Test Contact_CG	Minor	Customer Informed	1/05/2015 14:42
00001254				Minor	Approved	26/07/2015 19:46
00002250				Minor	Approved	28/07/2015 16:46
00003208	Test case CG	Low Ash content issue on A218/35 (not 21)	Test Contact_CG	Major	New	31/07/2015 11:16
00001074	Test case CG	Lila Delaviz of goods	Test Contact_CG	Minor	Under Investigation	11/05/2015 10:07
00001074	Buyer's Choice France	Production issue	Lambert Jacin	Anomaly	Customer Informed	13/05/2015 14:16
00001147	Buyer	Block spec complaint	000000_00000	Minor	Closed	6/07/15 Chat

Save Cancel

Step 1. Enter View Name

Required Information

View Name:
View Unique Name:

Step 2. Specify Filter Criteria

Filter By Owner:

- All Cases
- My Cases
- Queue --None--
- My Case Teams

Field Filters Help

Filter by Additional Fields (Optional):

Field	Operator	Value	
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND

Add Filter Logic:

Select a filter language when using "starts with" or "contains" operators.

Filter Language:

Step 2: Define the filter criteria. You can filter on values from all the fields on the Case Object

Step 3. Select Fields to Display

Available Fields	Selected Fields
Account Name	Case Number
First Name	Contact Name
Last Name	Subject
Contact Account Name	Status
Type	Severity
Case Record Type	Date/Time Opened
Case Origin	Case Owner Alias
Web Name	
Web Email	
Web Company	
Case Reason	
Parent Case Number	
Closed	
Escalated	
Date Opened	

Step 4. Restrict Visibility

- Visible only to me
- Visible to all users (includes partner and customer portal users)
- Visible to certain groups of users

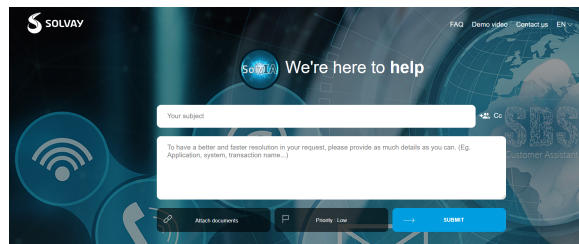
Save Cancel

Related articles

- [Webforms Process, Steps and Status](#)
- [Webforms Reception](#)
- [Webforms Analysis & Assignment](#)
- [Webforms treatment](#)
- [Webforms Closure](#)

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example