A2110 - Listviews

Overview

Listwiews 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.

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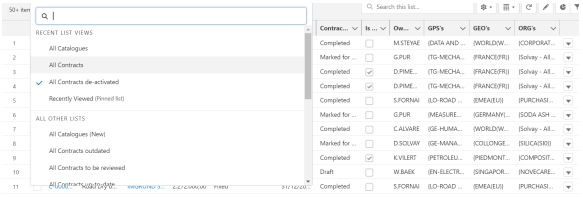
Where are Listviews ?

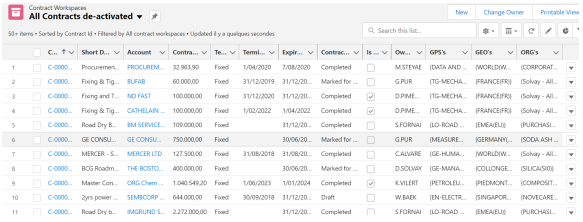
Listviews are accessible on any tab. Just click on one tab and choose which Listview you want to display.

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.

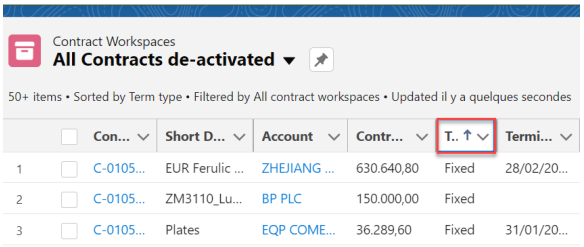
In this example, the displayed Listview is "All Contracts de-activated".



General navigation

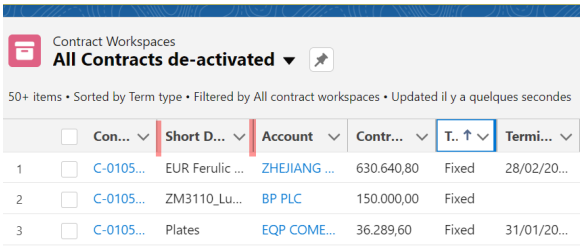
To **sort** a Listview, just click on any column header.

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

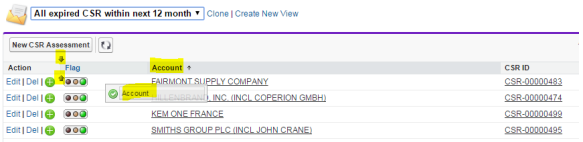


Feel free to **resize** any column by moving the column header left or right border. The new size of the column will remain, but only for your Salesforce account.

blocked URL



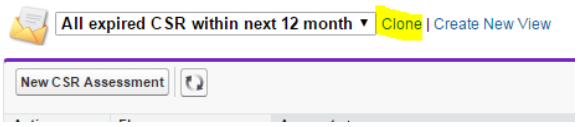
Feel also free to **move** a column from one place to another. This will remain for your Salesforce account only.



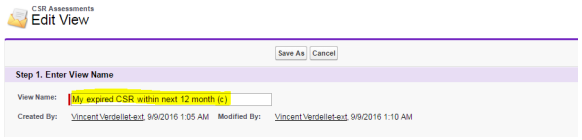
Customize Listviews

Fell free to clone any Listview to customize it.

Click on the clone button of any Listview

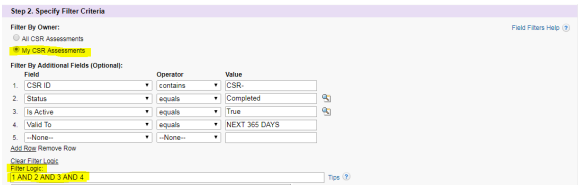


Choose a new name for you cloned view



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

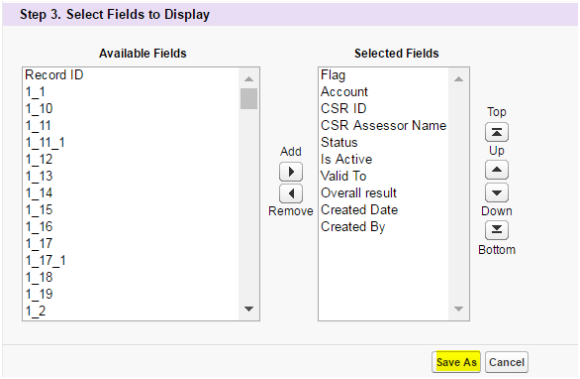
- **OR**, finds records that match either value.

1 OR 2

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

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.



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.