

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.

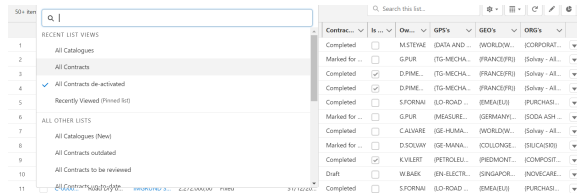
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Where are Listviews ?

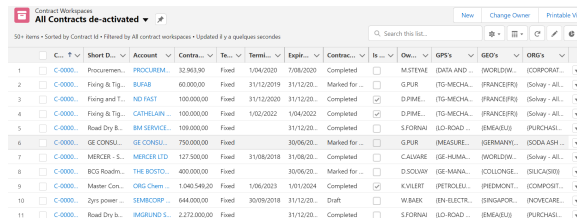
Listviews are accessible on any tab. Just click on one tab and choose which Listview you want to display.

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.

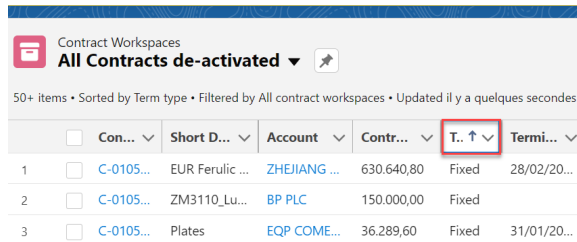
In this example, the displayed Listview is "All Contracts de-activated".



General navigation

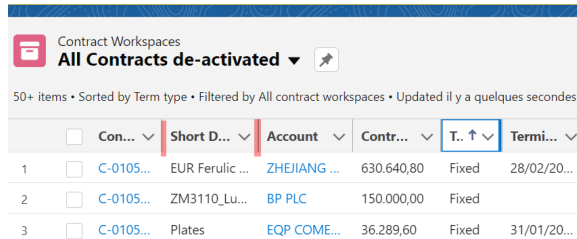
To **sort** a Listview, just click on any column header.

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.

 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 COFERION GMBH)	CSR-00000474
Edit Del 		KEM ONE FRANCE	CSR-00000499
Edit Del 		SMITHS GROUP PLC (INCL JOHN CRANE)	CSR-00000495

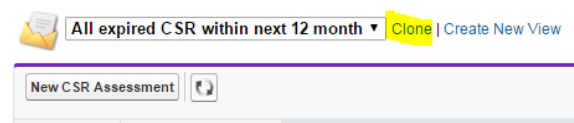
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Customize Listviews

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: VincentVardelleaust 9/9/2016 1:05 AM Modified By: VincentVardelleaust 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.

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 2: Specify Filter Criteria

Filter By Owner:
☒ All CSR Assessments
☒ My CSR Assessments

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--	

[Add Row](#) [Remove Row](#)

Clear Filter Logic

Filter Logic: 1 AND 2 AND 3 AND 4 [Top](#) 

[Field Filter Help](#) 

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	Top
1_11_1		Status	Up
1_12	Add	Is Active	Up
1_13	Remove	Valid To	Down
1_14		Overall result	Down
1_15		Created Date	Bottom
1_16		Created By	
1_17			
1_17_1			
1_18			
1_19			
1_2			

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.