Power-up Your List Views

Get the most from Lightning Now!

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Power-up Your List Views

- ❖ Basic list view features that Just work in Lightning
- ❖ Tips for teaching end users list views
- ❖ Intermediate list view features
- ❖ Advanced list view ideas

Personal Introduction

Terry Cole
President & Founder
StreetYouthMinistry.org

High-tech Engineer (25 years)

Nonprofit Since 2008

Rosie (Since 2009)

List View Operations

Basic level	2-minutes with practice
Intermediate level	<30 minutes of definition and implementation
Advanced level	~2 hours of research, definition and tinkering

Lightning List View Features That Just Work
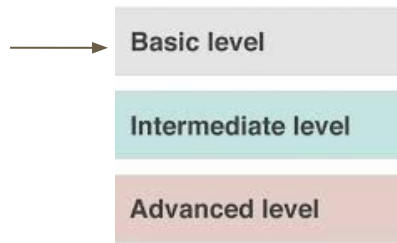
*Search for list views
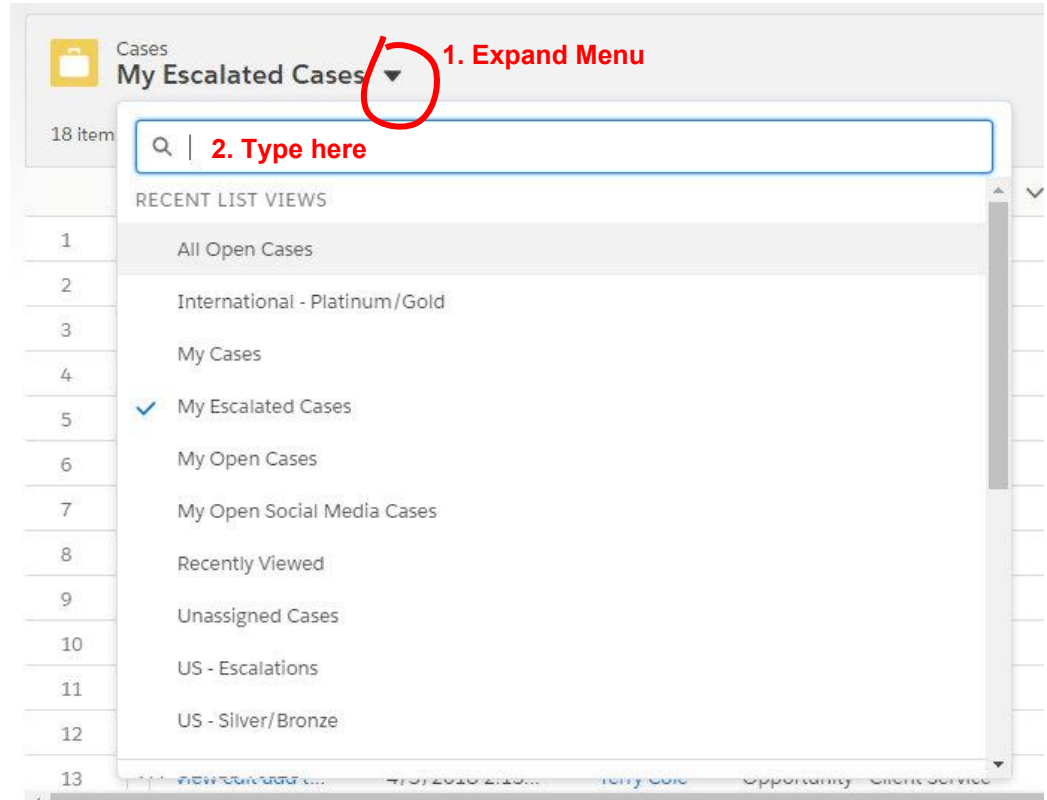
*Resize columns

*Text wrapping

*Action Menu

*Filters

*Kanban

*Charting

→	Basic level
	Intermediate level
	Advanced level

Search for List View

Search for list views on the object tab.

Resize Columns

Set column width by dragging header divider.

Text Wrapping

Toggle text wrapping using pulldown menu just to left of column label.

Persistent Column Widths

Width *and* text wrapping persistent per user until you reset columns widths using list control gear.
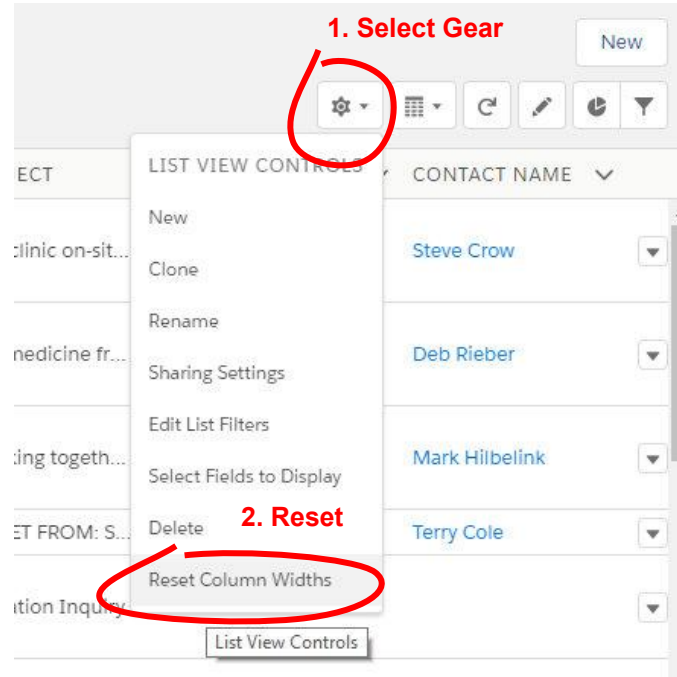
Action Menu

Open action menu to take actions without leaving list view!

Keyboard shortcut to save (ctrl-S) or close (ESC).

Sidebar Filter Changes

Intuitive filter opens on sidebar.

1. Open Filter

5. Save (or open drop-down to Save As)

2. Change Filter Values

3. Remove Filters

4. Add Filters or Filter Logic

Kanban Drag-and-Drop List View

Got picklists? Use Kanban!

Organize, summarize, change picklist value, action menu.

First four columns become card data.

1. Select Table Icon

2. Select Kanban

3. Group by any picklist value

4. Summarize by record count or by any numberical value

5. On-card Action Menu!

6. Drag and Drop to change column an picklist value

Sidebar Charting

Add sidebar chart(s) to list view for quick analysis
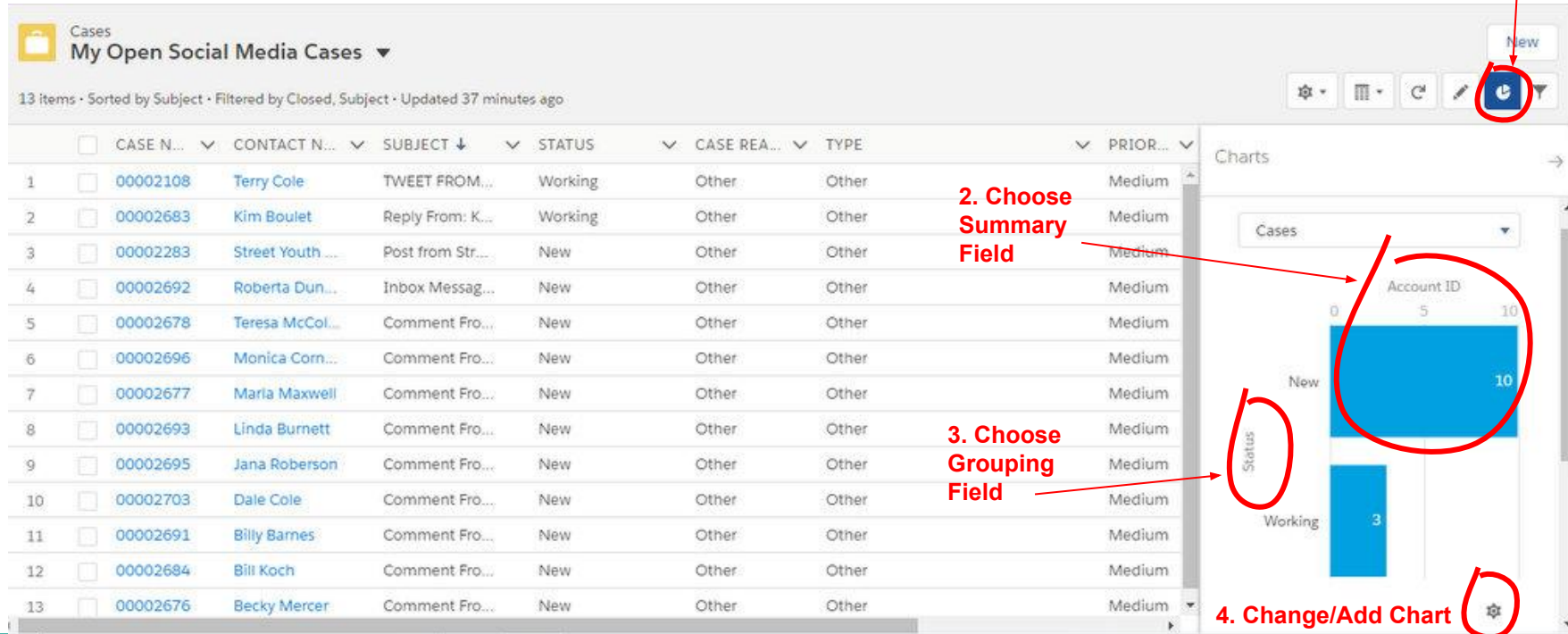
Lightning List View Features That Take A Moment

*Multi-record select and actions (classic and Lightning)

*In-line Editing (classic and Lightning)

List Mail

*List view in personalized navigation app layout

| Basic level |
| Intermediate level |
| Advanced level |
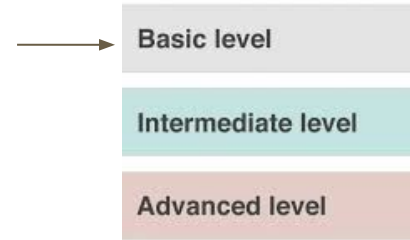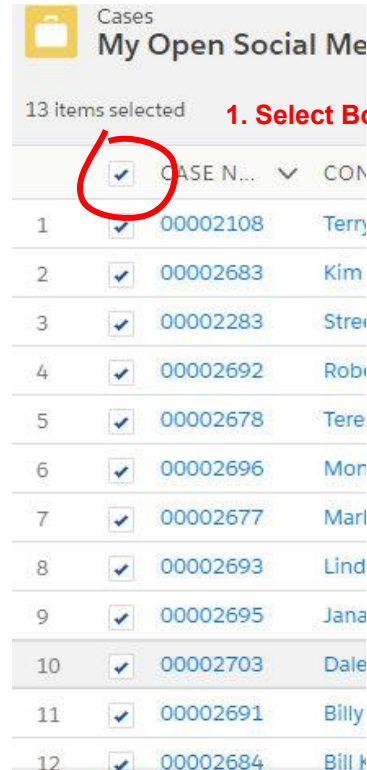
Multiple Record Select

Selecting multiple records.

Select all records quickly

-OR-

Select particular records

1. Select Box at Top of Column

1. Select Individual Record

Inline Editing of Multiple Records

Apply inline editing to all selected records.

Note: Inline editing requires record type filter if record type applies to object.

Not available if you have filter logic (until Summer 18)
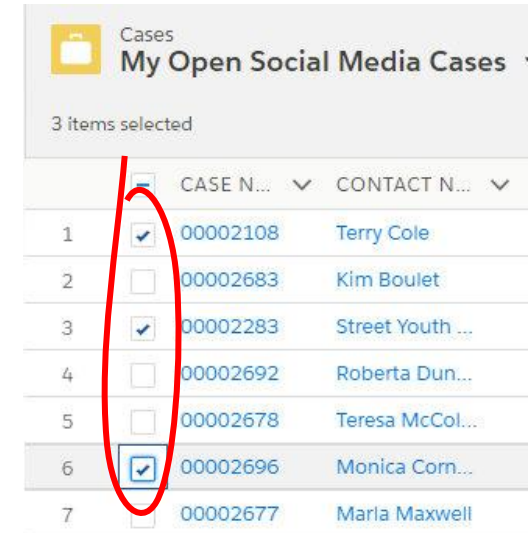
Cases
My Open Social Media Cases ▼

13 items selected

1. Select field and edit

		CASE N... ∨	CONTACT N... ∨	SUBJECT ↓ ∨	STATUS ∨	CASE REA... ∨	TYPE
1	✔	00002108	Terry Cole	TWEET FROM...	New	Other	her
2	✔	00002683	Kim Boulet	Reply From: K...	New		her
3	✔	00002283	Street Youth ...	Post from Str...	New		her
4	✔	00002692	Roberta Dun...	Inbox Messag...	New		

☑ Update 13 selected items

Cancel   **Apply**

2. Select Update multiple items   **3. Apply**

6	✔	00002690	Monica Com...	Comment Fro...	New	Other	Other
7	✔	00002677	Marla Maxwell	Comment Fro...	New	Other	Other
8	✔	00002693	Linda Burnett	Comment Fro...	New	Other	Other
9	✔	00002695	Jana Roberson	Comment Fro...	New	Other	Other
10	✔	00002703	Dale Cole	Comment Fro...	New	Other ✎	Other
11	✔	00002691	Billy Barnes	Comment Fro...	New	Other	Other
12	✔	00002684	Bill Koch	Comment Fro...	New	Other	Other

Cancel   **Save**

4. Save after all in-line edits made.

List Email

Send a custom or template-based email to all or selected members of a list view of contacts or leads!

(Coming in Summer 18 to Campaigns!)

1. Contacts or Leads

SYM Cases Lightning | My Escalated Cases | Home | My Task List | SYM Events | Accounts | Volunteer Jobs | Contacts | Leads | More

Contacts
SYM Employees

2. List view

4. Open Menu   New | Import | Add to Campaign

5. Send List Email   Send List Email

3 items selected

	FIRST NAME ↑	LAST NAME	EMAIL	MAILING CITY
✓	Darvin	Tan	darvin@streetyouthministry.org	Austin
✓	Dee	Odom	dee@streetyouthministry.org	
✓	Terry	Cole	terry.cole@gmail.com	Austin

3. Select one or more

List Email

Type Text Template in modal window (not template in setup!)

HTML and rich text allowed.

Select insert fields
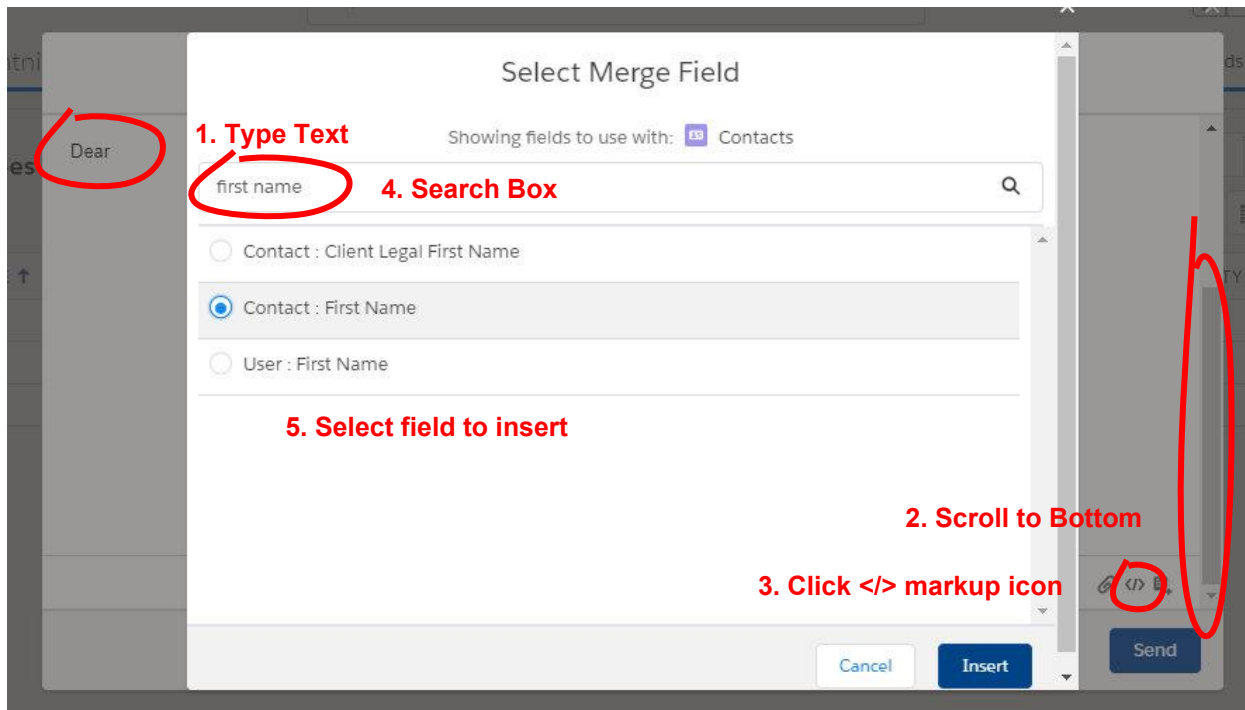
List Email

Save or restore templates, including access to classic templates.

Template icon next to field markup icon
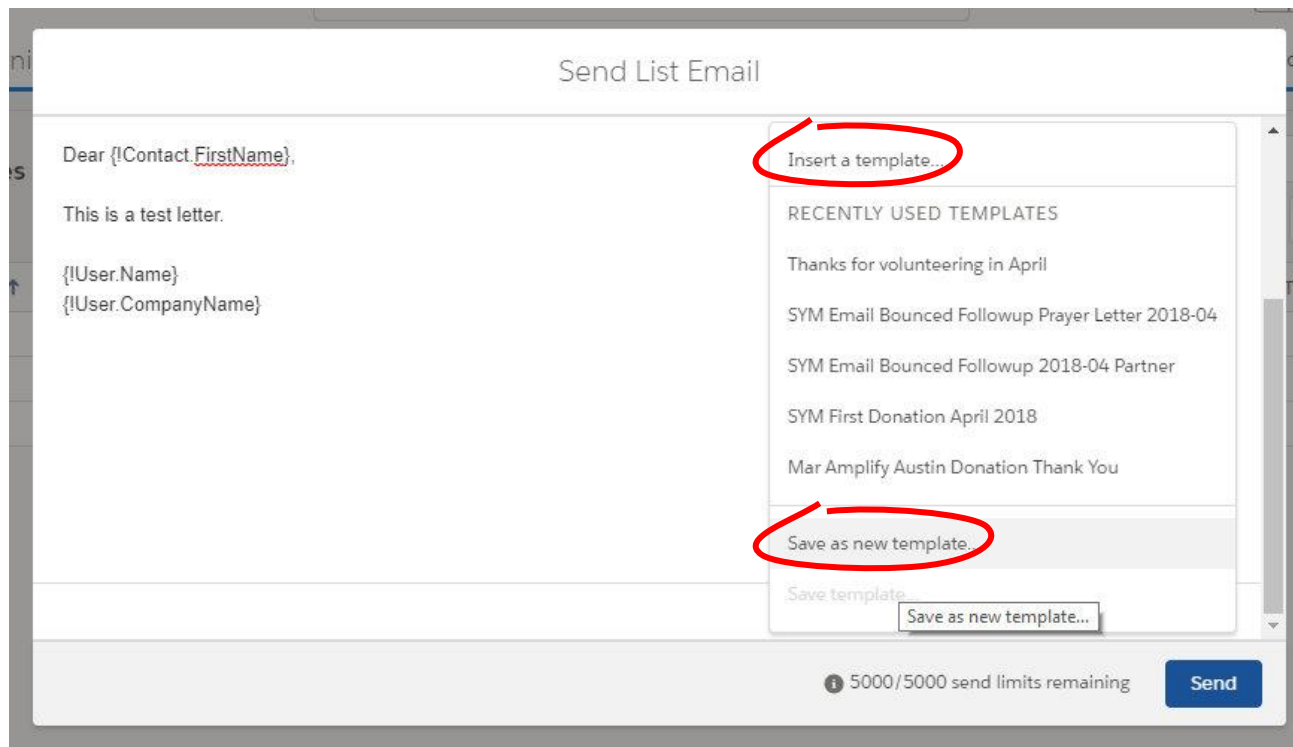
List Email

Review each merge separately!

Send up to 5000 per organization daily.

Send List Email

Recipients ⓘ (3 Selected Recipients) SYM Empl... ✕

Enter Subject....

Content | Review | **1. Select Review**

Recipients
▼ Selected Recipients
~~Marvin Tan~~
Dee Odom
~~Terry Cole~~

1. Choose Person

Dear Dee,

This is a test letter.

Terry Cole
Street Youth Ministry

ⓘ 5000/5000 send limits remaining   Send

Adding List View to Personal Navigation

Adding list view to application navigation bar as a custom tab.

First open as new temporary tab. Then add to navigation.

Can rename and reorder.

Personalized Navigation Must Be Enabled

Does not work:

a) if disable navigation personalization.

b) with classic app visible in Lightning! (Must be Lightning app).

Look for pencil!

1. Open Setup

2. Search User Interface

3. Disable or not
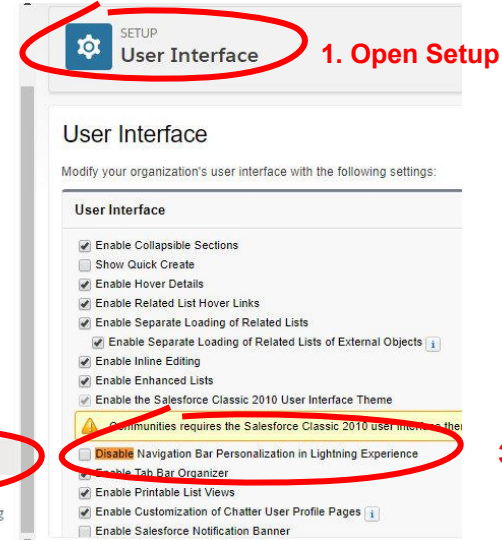
Pencil in Navigation means enabled
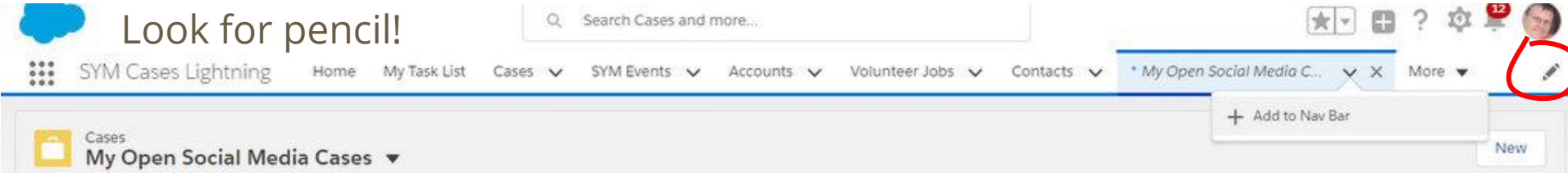
Your Favorite Lightning List View Basic Feature?

*Search for list views

*Resize columns

*Text wrapping

*Action Menu

*Filters

*Kanban

*Charting

*Multi-record select and actions (classic and Lightning)

*In-line Editing (classic and Lightning)

*List Mail

*List view in personalized navigation app layout

→ Basic level

Intermediate level

Advanced level
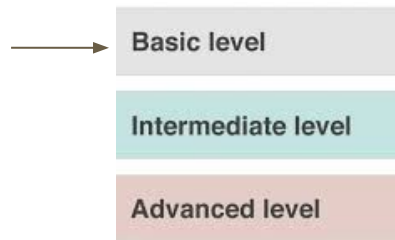
Tips for End User Training
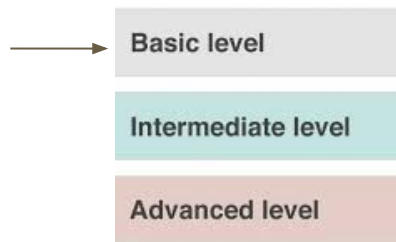
Why do it?

Users love productivity and efficiently boost

Users love adding to custom app layouts

One of the most obvious benefits of Lightning to offset temporary pain

Learn skills that prepare one for reporting (super user id/development)

How?

Not a lot of options… probably takes a lunch and learn preso like this one

End User Training Resources
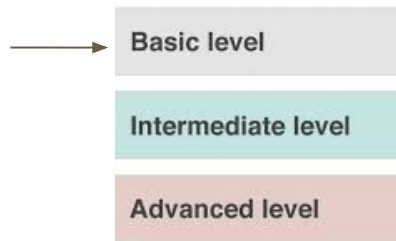
Trailhead:

- **Create and Customize List View (20 min) for LEX**
  https://trailhead.salesforce.com/modules/lex_customization/units/lex_customization_list
- **Work with List View (20 min) for migrating from classic**
  https://trailhead.salesforce.com/modules/lightning-experience-for-salesforce-classic-users/units/work-with-list-views

Youtube:

- **Idealist Consulting https://www.youtube.com/watch?v=IZRUcETSs-M**
- **SmartAcer https://www.youtube.com/watch?v=eGkgD3Sfmck**
- **Salesforce https://www.youtube.com/watch?v=EaWPI0LCQDM**

Intermediate List View Features

*List View as a component of Home or Page Layouts

*Adding a Quick Action Button

Concierge Fields: Bringing more and denser info into the view with formula fields that anticipate your needs (classic or Lightning) -- See MightyForce.org for blog

Link Fields: Bringing more action opens into the view with custom formula link fields (classic or Lightning) -- See MightyForce.org for blog

Basic level

Intermediate level

Advanced level
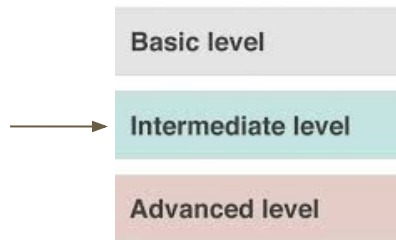
Lightning Page with List View Components

Add to Home Page or Page Layout

Any object, any existing list view!

1. Open Gear

2. Edit Page

Setup

Developer Console

Edit Page

9. Save/Activate

4. Object

5. List View

6. Row Limit

7. Action Menu

8. Visibility Condition

3. Drag/Drop List View Component

Lightning App Builder — SYM Lightning Home — Back — Help

Lightning Components

Search components...

Standard (21)
- App Launcher
- Assistant
- Chatter Feed
- Chatter Publisher
- Dashboard
- Flow
- Items to Approve
- Key Deals
- List View
- Paused Flow Interviews
- Performance
- Quip

Get more on the AppExchange

List View Buttons (Quick Action)

1 Define Update Record Quick Action Button

2 Add to list view "search layout" for object in setup.

1. Open Gear

2. Setup

3. Object Manager

4. Select Object

5. Buttons & Actions

6. New Action

List View Buttons (Quick Action)

1 Define Update Record Quick Action Button

2 Add to list view "search layout" for object in setup.

Action: Close Social Media Case   Help for this Page

Save   Quick Save   Preview As... ▼   Cancel   Undo   Redo

9. Save Layout

Case Fields

🔍 Quick Find Field Name

Blank Space	Author Username	Case Owner	Closed by Self-Se...	Contact Fax	Contact Phone	Date/Time Opened	Inte
Account Name	Business Hours	Case Reason	Closed When Created	Contact Mobile	Conversation Exte...	Description	Las
Asset	Case Number	Case Source	Contact Email	Contact Name	Created By	ElectricalCategories	Linl
Author External Id	Case Origin		Contact Email	Contact Phone	Date/Time Closed	Escalated	Med

Label: Case Number
Type: Auto Number
Length: 30

(blank layout in this case)

Description
Success Message
Created By   Terry Cole, 4/22/2018 7:00 PM   Modified By   Terry Cole, 4/22/2018 7:00 PM

Edit   Delete   Edit Layout

Predefined Field Values   New   **10. Add Predefined Fields**

Action	Field Name	API Name	Field Type	Value
Edit | Del	Case Origin	Origin	Picklist	Social Media
Edit | Del	Case Reason	Reason	Picklist	Other
Edit | Del	Status	Status	Picklist	Closed
Edit | Del	Type	Type	Picklist	Other

List View Buttons (Quick Action)

1 Define Update Record Quick Action Button

2 Add to list view "search layout" for object in setup.

List View Buttons (Quick Action)

Quick Action is Lightning Only but classic methods still possible

except NO Java Script Buttons

Advanced List View Possibilities

Adding Visual Force list view button using standard controller:

https://developer.salesforce.com/docs/atlas.en-us.pages.meta/pages/pages_controller_sosc_custom_button.htm

Adding Visual Flow list view button declaratively:

https://andyinthecloud.com/2015/12/12/visual-flow-with-list-view-and-related-list-buttons/

Any automation action from a list view via

Mass Action Scheduler

https://github.com/DouglasCAyers/sfdx-mass-action-scheduler/wiki/Example:-Field-Updates-via-List-View-and-Quick-Action

Basic level

Intermediate level
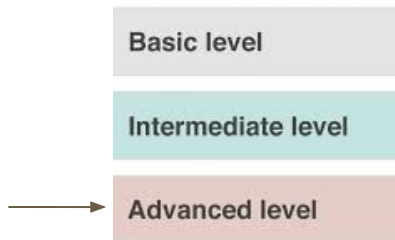
→ Advanced level

Review What We've Covered

✓ Basic level	2-minutes with practice End User Accessible
✓ Intermediate level	<30 minutes of definition and implementation for admin
✓ Advanced level	~2 hours of research, definition and tinkering

What Does Data Do?

We work so hard to collect good data. But what happens then?

Report Voices

Data wants to speak!

It wants to **get work done**!

But how do we let it?

The data speaks for itself.
That's the easiest measure of success

Check out Reporting Presentation on Mightyforce.blog if you like these ideas!

What Are We Taking Back to the Office Today?

- ❖ List view features that just work
- ❖ End user training ideas

- ❖ Quick action buttons
- ❖ Custom navigation

- ❖ Visual flow buttons
- ❖ Mass Action Scheduler

✅ **Basic level**

✅ **Intermediate level**

✅ **Advanced level**

Thank You!

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Slides on Mightyforce.org

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