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# Power-up Your List Views

Get the most from Lightning Now!

Terry Cole

[terry@StreetYouthMinistry.org](mailto:terry@StreetYouthMinistry.org)

@streetyouth

StreetYouthMinistry.org

Blog: MightyForce.org

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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

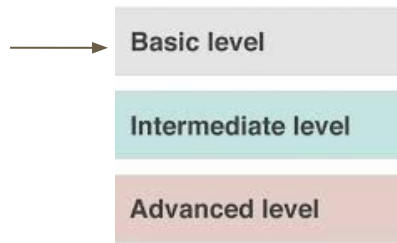
\*Text wrapping

\*Action Menu

\*Filters

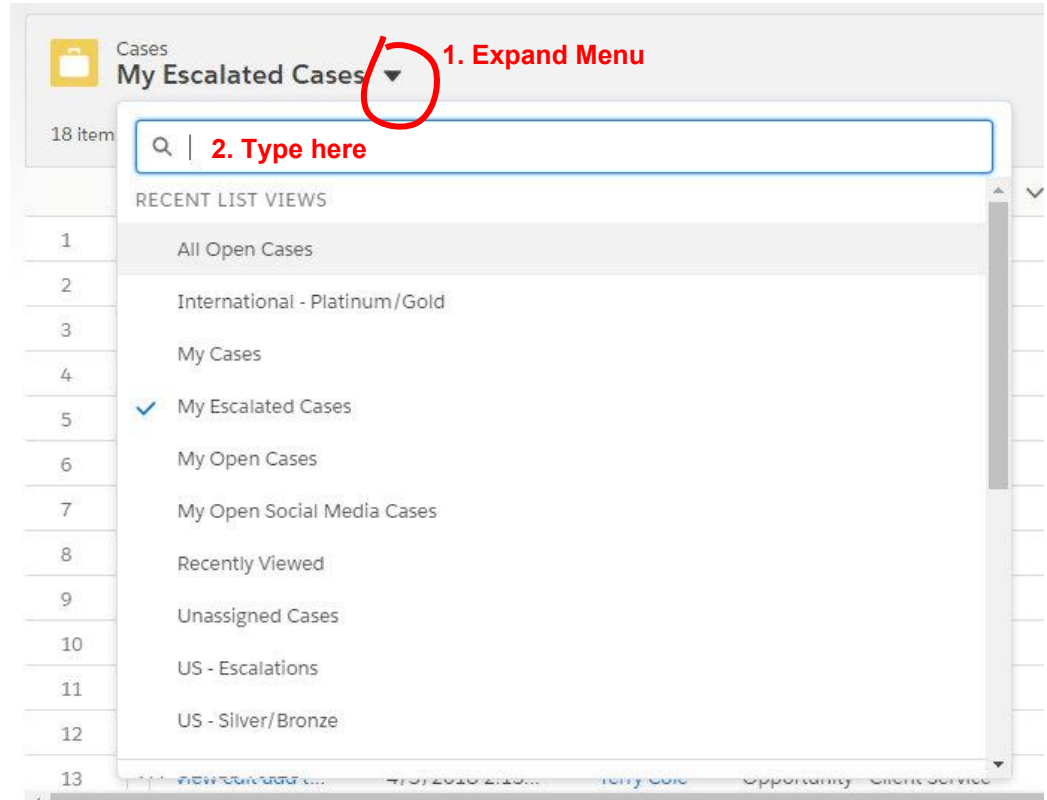
\*Kanban

\*Charting



# Search for List View

Search for list views on the object tab.



# Resize Columns

Set column width by dragging header divider.

**1. Drag Width**

The diagram illustrates the process of resizing columns in a table. The top screenshot shows a table with columns: LINKS, DATE/TIME OPENED, and OWNER... The divider between DATE/TIME OPENED and OWNER... is circled in red. A red arrow points from this circle to a second screenshot below. The second screenshot shows the same table, but the columns are now fully expanded, showing the full names of the columns and the data rows.

	<input type="checkbox"/>	LINKS ↑	DATE/TIME OPENED	OWNER...
1	<input type="checkbox"/>	<a href="#">View edit add t...</a>	3/18/2017 10:44 AM	Terry Cole
2	<input type="checkbox"/>	<a href="#">View edit add t...</a>	3/20/2017 1:52 PM	Terry Cole
3	<input type="checkbox"/>	<a href="#">View edit add t...</a>	4/12/2017 6:47 PM	Terry Cole

# Text Wrapping

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

The image shows two screenshots of a Salesforce interface. The top screenshot shows the 'My Escalated Cases' table with the 'TYPE' column header. A red circle highlights the dropdown arrow next to 'TYPE', with the annotation '1. Open Menu'. A second red circle highlights the 'Wrap text' option in the dropdown menu, with the annotation '2. Select Wrap Text'. A red arrow points from this menu to the bottom screenshot. The bottom screenshot shows the same table, but the 'TYPE' column header now has a checkmark in its dropdown arrow, and the text in the 'TYPE' column is wrapped. A small tooltip labeled 'Type' is visible over the dropdown arrow.

**1. Open Menu**

**2. Select Wrap Text**

	LINKS ↑	DATE/TIME OPENED	OWNER...	TYPE	CASE REA...	STATUS
1	<a href="#">View</a> <a href="#">edit</a> <a href="#">add task</a>	3/18/2017 10:44 AM	Terry Cole	Opport...	Opportunity	New
2	<a href="#">View</a> <a href="#">edit</a> <a href="#">add task</a>	3/20/2017 1:52 PM	Terry Cole	Opport...	Opportunity	New
3	<a href="#">View</a> <a href="#">edit</a> <a href="#">add task</a>	4/12/2017 6:47 PM	Terry Cole	Opport...	Opportunity	New

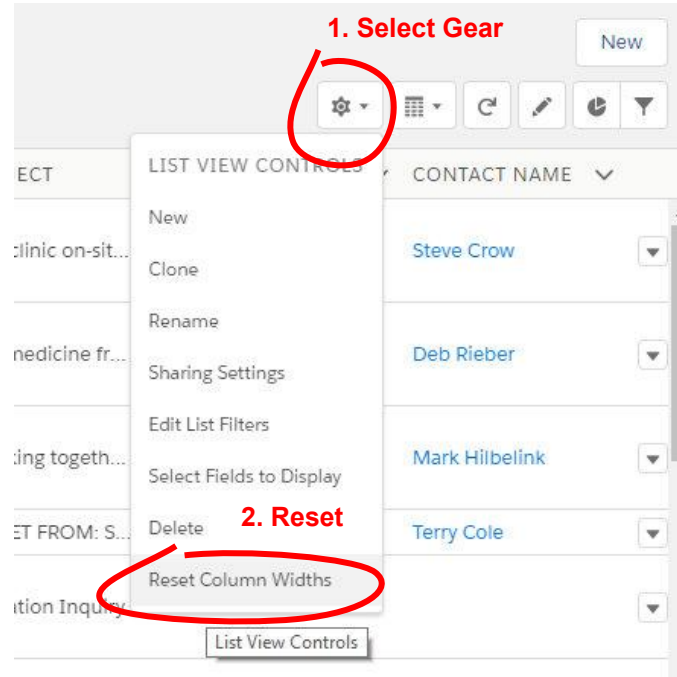
  

	LINKS ↑	DATE/TIME OPENED	OWNER...	TYPE	CASE REA...	STATUS
1	<a href="#">View</a> <a href="#">edit</a> <a href="#">add task</a>	3/18/2017 10:44 AM	Terry Cole	Opportunity - Client Service	Opportunity	New
2	<a href="#">View</a> <a href="#">edit</a> <a href="#">add task</a>	3/20/2017 1:52 PM	Terry Cole	Opportunity - Client Service	Opportunity	New
3	<a href="#">View</a> <a href="#">edit</a> <a href="#">add task</a>	4/12/2017 6:47 PM	Terry Cole	Opportunity - Client Service	Opportunity	New



# 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).

The screenshot displays a web application interface for managing cases. At the top, a header bar shows 'Cases' and 'My Open Social Media Cases'. Below this, a table lists cases with columns for CASE N..., CONTACT N..., SUBJECT, STATUS, CASE REA..., TYPE, PRIOR..., DATE/TIME O..., and CA... The table contains 13 items, sorted by Subject and filtered by Closed, Subject, and Updated 11 minutes ago. A modal pop-up box is open, titled 'Edit 00002108', showing details for a case owned by Terry Cole. The modal includes fields for Case Number (00002108), Contact Name (Terry Cole), Account Name (Cole (Terry) Family), Type (Other), Case Reason (Other), Status (Working), Priority (Medium), Contact Phone (512) 553-3976, and Contact Email (terry.cole@gmail.com). The modal also has a checkbox for 'Assign using active assignment rule'. Red annotations highlight the following actions:

- 1. Open Menu:** A red circle highlights the dropdown menu icon in the top right corner of the table.
- 2. Select Action:** A red arrow points to the 'Edit' button in the dropdown menu.
- 3. Modal pop-up box opens record without leaving list!** A red circle highlights the 'Edit 00002108' button in the table.
- 4. Save or Cancel. Use keyboard shortcuts, too!** A red circle highlights the 'Cancel' and 'Save' buttons at the bottom of the modal.

# Sidebar Filter Changes

Intuitive filter opens on sidebar.

The screenshot shows a web application for managing social media cases. The main area displays a table of cases with columns for Case Number, Contact Name, Subject, Status, Case Reaction, Type, and Priority. The sidebar on the right contains filter controls. Red annotations with numbered steps guide the user through the filtering process:

- 1. Open Filter**: Points to the filter icon (a funnel) in the top right toolbar.
- 2. Change Filter Values**: Points to the 'Closed equals False' filter rule in the sidebar.
- 3. Remove Filters**: Points to the 'Remove All' button at the bottom of the sidebar.
- 4. Add Filters or Filter Logic**: Points to the 'Add Filter' and 'Add Filter Logic' buttons at the bottom of the sidebar.
- 5. Save (or open drop-down to Save As)**: Points to the 'Save' button in the top right of the sidebar.

The table contains 13 items, sorted by Subject and filtered by Closed, Subject, and Updated 25 minutes ago.

	CASE N...	CONTACT N...	SUBJECT ↓	STATUS	CASE REA...	TYPE	PRIOR...
1	00002108	Terry Cole	TWEET FROM...	Working	Other	Other	Medium
2	00002683	Kim Boulet	Reply From: K...	Working	Other	Other	Medium
3	00002283	Street Youth ...	Post from Str...	New	Other	Other	Medium
4	00002692	Roberta Dun...	Inbox Messag...	New	Other	Other	Medium
5	00002678	Teresa McCol...	Comment Fro...	New	Other	Other	Medium
6	00002696	Monica Corn...	Comment Fro...	New	Other	Other	Medium
7	00002677	Maria Maxwell	Comment Fro...	New	Other	Other	Medium
8	00002693	Linda Burnett	Comment Fro...	New	Other	Other	Medium
9	00002695	Jana Roberson	Comment Fro...	New	Other	Other	Medium
10	00002703	Dale Cole	Comment Fro...	New	Other	Other	Medium
11	00002691	Billy Barnes	Comment Fro...	New	Other	Other	Medium
12	00002684	Bill Koch	Comment Fro...	New	Other	Other	Medium
13	00002676	Becky Mercer	Comment Fro...	New	Other	Other	Medium

# 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**

	CASE N...	CONTACT N...	SUBJECT ↓	STATUS	CASE REA...	TYPE	PRIOR...	DATE
1	00002108	Terry Cole	TWEET FROM...	Working	Other	Other	Medium	10/4/...
2	00002683	Kim Boulet	Reply From: K...	Working	Other	Other	Medium	4/7/8...

**2. Select Kanban**

**3. Group by any picklist value**

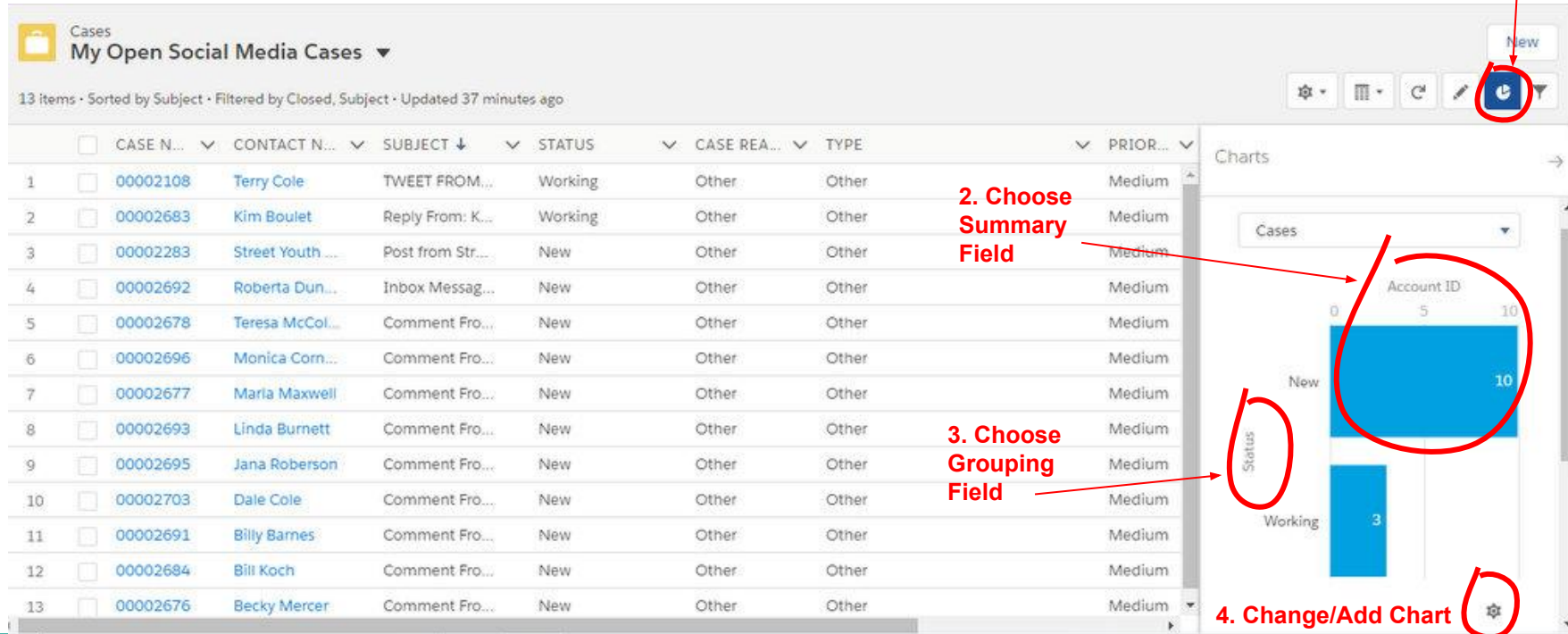
**4. Summarize by record count or by any numerical value**

**5. On-card Action Menu!**

**6. Drag and Drop to change column and picklist value**

# Sidebar Charting

Add sidebar chart(s) to list view for quick analysis



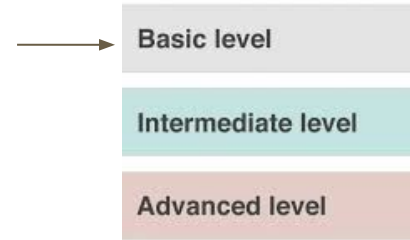
# Lightning List View Features That Take A Moment

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

\*In-line Editing (classic and Lightning)

List Mail

\*List view in personalized navigation app layout



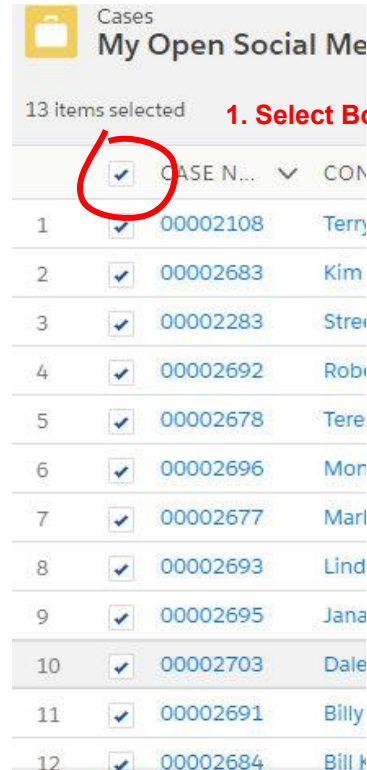
# Multiple Record Select

Selecting multiple records.

Select all records quickly

-OR-

Select particular records

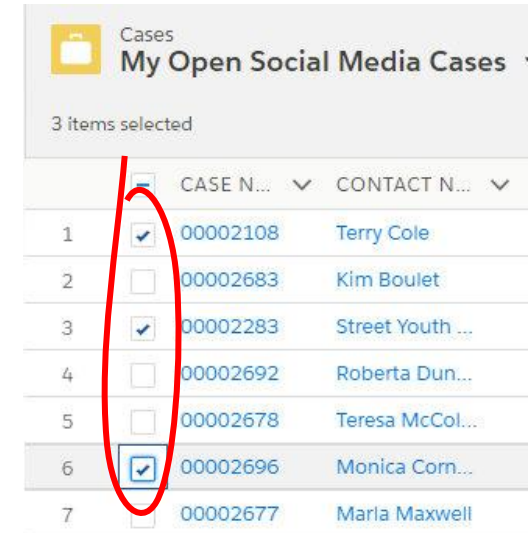


Cases  
My Open Social Media Cases

13 items selected

1. Select Box at Top of Column

	<input checked="" type="checkbox"/>	CASE N...	CON
1	<input checked="" type="checkbox"/>	00002108	Terry
2	<input checked="" type="checkbox"/>	00002683	Kim
3	<input checked="" type="checkbox"/>	00002283	Stre
4	<input checked="" type="checkbox"/>	00002692	Robi
5	<input checked="" type="checkbox"/>	00002678	Tere
6	<input checked="" type="checkbox"/>	00002696	Mon
7	<input checked="" type="checkbox"/>	00002677	Marl
8	<input checked="" type="checkbox"/>	00002693	Lind
9	<input checked="" type="checkbox"/>	00002695	Jana
10	<input checked="" type="checkbox"/>	00002703	Dale
11	<input checked="" type="checkbox"/>	00002691	Billy
12	<input checked="" type="checkbox"/>	00002684	Bill



Cases  
My Open Social Media Cases

3 items selected

	<input checked="" type="checkbox"/>	CASE N...	CONTACT N...
1	<input checked="" type="checkbox"/>	00002108	Terry Cole
2	<input type="checkbox"/>	00002683	Kim Boulet
3	<input checked="" type="checkbox"/>	00002283	Street Youth ...
4	<input type="checkbox"/>	00002692	Roberta Dun...
5	<input type="checkbox"/>	00002678	Teresa McCol...
6	<input checked="" type="checkbox"/>	00002696	Monica Corn...
7	<input type="checkbox"/>	00002677	Maria Maxwell

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)

**1. Select field and edit**

**2. Select Update multiple items**

**3. Apply**

	CASE N...	CONTACT N...	SUBJECT ↓	STATUS	CASE REA...	TYPE
1	00002108	Terry Cole	TWEET FROM...	New	Other	
2	00002683	Kim Boulet	Reply From: K...	New	Update 13 selected items	
3	00002283	Street Youth ...	Post from Str...	New		
4	00002692	Roberta Dun...	Inbox Messag...	New		
5	00002690	Monica Cor...	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

**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**

**2. List view**

**3. Select one or more**

**4. Open Menu**

**5. Send List Email**

3 items selected	FIRST NAME ↑	LAST NAME	EMAIL	MAILING CITY
<input checked="" type="checkbox"/>	Darvin	Tan	<a href="mailto:darwin@streetyouthministry.org">darwin@streetyouthministry.org</a>	Austin
<input checked="" type="checkbox"/>	Dee	Odom	<a href="mailto:dee@streetyouthministry.org">dee@streetyouthministry.org</a>	
<input checked="" type="checkbox"/>	Terry	Cole	<a href="mailto:terry.cole@gmail.com">terry.cole@gmail.com</a>	Austin

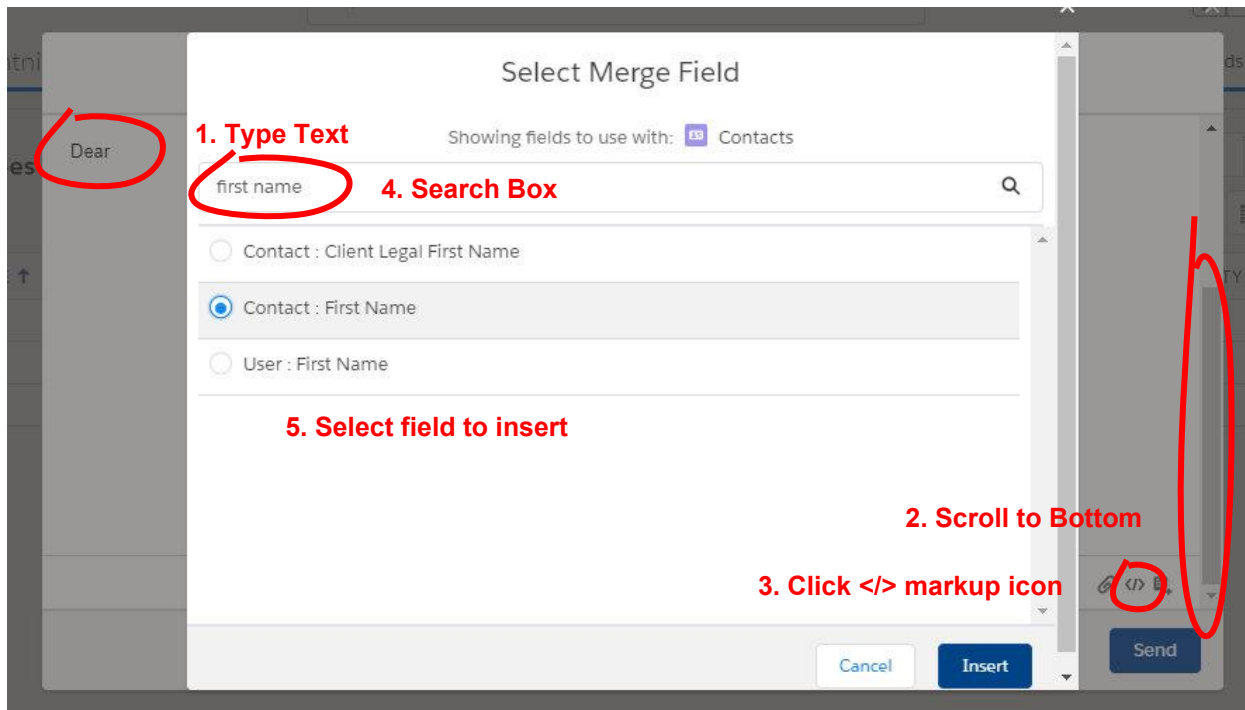
# List Email

Type Text

Template in modal window (not template in setup!)

HTML and rich text allowed.

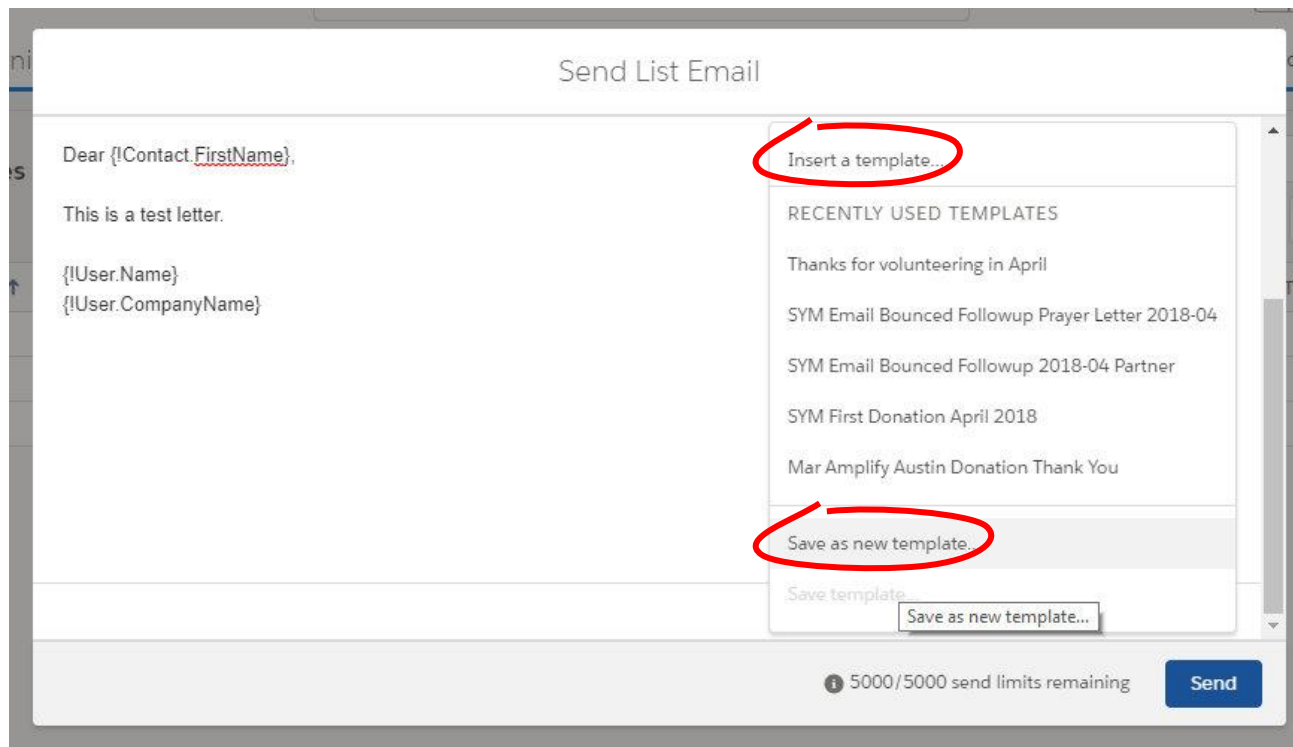
Select insert fields



# 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.

The screenshot shows the 'Send List Email' window. At the top, the title is 'Send List Email'. Below it, the 'Recipients' field shows '(3 Selected Recipients) SYM Empl...' with a dropdown arrow. The 'Enter Subject...' field is empty. The 'Content' tab is selected, and the 'Review' tab is also visible. The 'Recipients' list on the left shows 'Selected Recipients' with a dropdown arrow, and three names: 'Dee Odom', 'Terry Cole', and 'Terry Cole'. The 'Review' tab is circled in red, with the text '1. Select Review' next to it. The 'Recipients' list is also circled in red, with the text '1. Choose Person' next to it. The email content area shows a personalized message: 'Dear Dee, This is a test letter. Terry Cole Street Youth Ministry'. At the bottom right, the status '5000/5000 send limits remaining' is circled in red, next to a 'Send' button.

Send List Email

Recipients (3 Selected Recipients) SYM Empl... x

Enter Subject...

Content Review

1. Select Review

Recipients

Selected Recipients

Dee Odom

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.

The screenshot shows the SYM Cases Lightning application interface. The top navigation bar includes 'SYM Cases Lightning', 'Home', 'My Task List', 'Cases', and 'SYM Events'. The 'Cases' menu is expanded, showing a list of recent records and lists. The 'My Open Social Media Cases' list is selected. The 'Open in New Tab' option is highlighted. The bottom navigation bar shows the 'My Open Social Media Cases' tab. The 'Add to Nav Bar' option is highlighted.

**1. Expand Object Tab Menu**

**2. Select Open in New Tab**

**3. Open Temporary Tab Menu**

**4. Select Add to Nav Bar for User Customization**

	CASE N...	CONTACT N...	SUB
1	00002108	Terry Cole	TW
2	00002683	Kim Boulet	Rep
3	00002283	Street Youth ...	Pos
4	00002692	Roberta Dun...	Inb
5	00002678	Teresa McCol...	Cor
6	00002696	Monica Corn...	Cor
7	00002677	Marla Maxwell	Co

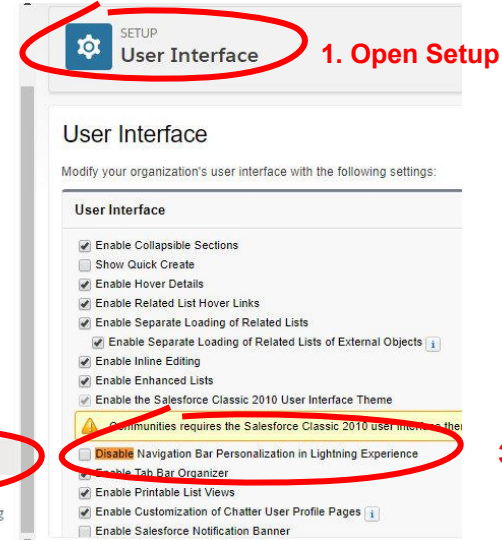
# Personalized Navigation Must Be Enabled

Does not work:

a) if disable navigation personalization.

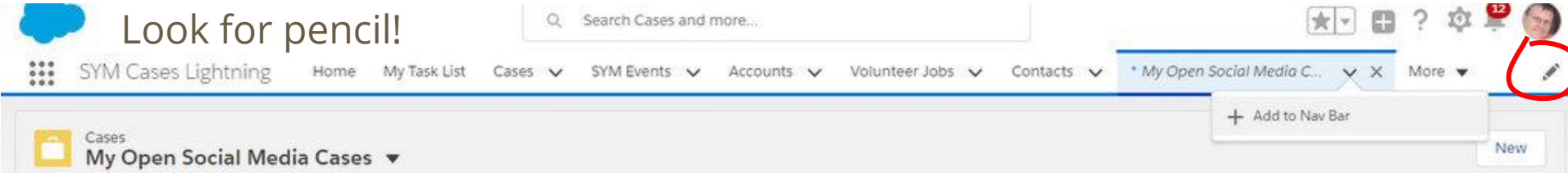
b) with classic app visible in Lightning! (Must be Lightning app).

2. Search User Interface



Pencil in Navigation means enabled

Look for pencil!



# Your Favorite Lightning List View Basic Feature?

\*Search for list views

\*Resize columns

\*Text wrapping

\*Action Menu

\*Filters

\*Kanban

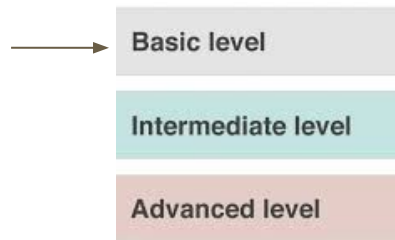
\*Charting

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

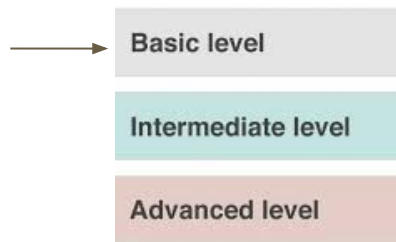
\*In-line Editing (classic and  
Lightning)

\*List Mail

\*List view in personalized  
navigation app layout



# 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

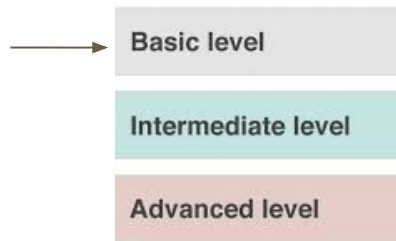
Learn skills that prepare one for reporting (super user id/development)

## 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](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>

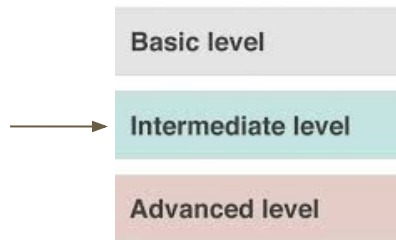
# Intermediate List View Features

\*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](https://MightyForce.org) for blog

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



# 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**

**3. Drag/Drop List View Component**

**4. Object**

**5. List View**

**6. Row Limit**

**7. Action Menu**

**8. Visibility Condition**

**9. Save/Activate**

**Lightning App Builder** Pages **SYM Lightning Home**

Desktop Shrink To View Refresh

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
- Quick

**My Open Cases**

CASE N.	CONTACT N.	SUBJECT	STATUS	CASE REA.	TYPE
00002694	John Pao	Client Service Opportunity Case for John Pao	New	Opportunity	Opportunity - Client Service
00002695	Dylan Palmer	Interview Case for Dylan Palmer	Solution Proposed	Other	Other
00002693	Christina Diagala	Interview Case for Christina Diagala	Solution Proposed	Other	Other
00002698	Conner Oye	Volunteer Inquiry Case for Conner Oye	Solution Proposed	Inquiry	Inquiry - Individual Volunteer
00002409	Karen Miller	Client Service Case from	Solution Proposed	Opportunity	Opportunity - Client Service
00002407	Wesley Gaulton	Client Service Case from	Working	Opportunity	Opportunity - Client Service

**My Contacts without Affiliations**

NAME WITH CONTACT NO.	LINKS	RECENT CAMPAIGNS	LAST MODIFIED
Roberta Brian Van der Laan 26...	view edit add task add off add ne...	SYM Source Emails from VR P...	4/22/2018 4:00 AM
Dave Cole Van der Laan 2018 O...	view edit add task add off add ne...	QNL Easter Mar 2018 - Donor...	4/22/2018 4:00 AM
Donor Qn Update Feb 2018 S...	view edit add task add off add ne...	Donor Qn Update Feb 2018 S...	4/22/2018 2:00 AM
Top Ten Mingleton Letter 2017...	view edit add task add off add ne...	Top Ten Mingleton Letter 2017...	4/22/2018 2:00 AM
Volunteers Road 2018 Confirm...	view edit add task add off add ne...	Volunteers Road 2018 Confirm...	4/22/2018 4:00 AM

**SYM Tools**

- Client Service App
- Volunteer Service App
- Process All Priority Event Notices
- Process All Normal Event Notices
- Close All Events
- Capture Story
- Capture Staff Hours
- Capture Vol Coord Hours
- Capture Admin Hours
- Capture Intern Hours
- Check My Resource Grade
- Review Client Notes
- Enter Volunteer Event
- Contact Clients From Month Ago

**SYM Admin Tools**

- Copy SYM Events
- Confirm Web Sign Up
- Match Volunteers to Events
- Contact Connectors
- Contact External Reference Teams
- Make Newsletter Campaigns

**Page > List View**

Case

My Open Cases

Number of Records to Display

6

☐ Hide list view action bar

**Set Component Visibility**

Filters

+ Add Filter

# 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**

LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Accept	Accept			Standard page	
Cases Tab	Tab			Standard page	
Clone	Clone			Standard page	
Close Case	CloseCase			Standard page	
<a href="#">Close Social Media Case</a>	<a href="#">SYM_Close_Social_Media_Case</a>		Update a Record	Action Layout Editor	
Delete	Delete			Standard page	

# List View Buttons (Quick Action)

1 Define Update Record Quick Action Button

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

7. Name Quick Action

8. Define Layout

9. Save Layout

(blank layout in this case)

10. Add Predefined Fields

Action	Field Name	API Name	Field Type	Value
<a href="#">Edit</a>   <a href="#">Del</a>	Case Origin	<a href="#">Origin</a>	Picklist	Social Media
<a href="#">Edit</a>   <a href="#">Del</a>	Case Reason	<a href="#">Reason</a>	Picklist	Other
<a href="#">Edit</a>   <a href="#">Del</a>	Status	<a href="#">Status</a>	Picklist	Closed
<a href="#">Edit</a>   <a href="#">Del</a>	Type	<a href="#">Type</a>	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.

**12. Find List Views**

LAYOUT	COLUMNS DISPLAYED	BUTTONS DISPLAYED
List View		New, Accept, Close, Change Owner, Change Status, Close Social Media Case
Lookup Dialogs	Case Number, Subject, Contact Name, Account Name, Status	N/A
Lookup Phone Dialogs	Case Number, Subject, Contact Name, Account Name, Status	N/A
Search Filter Fields	N/A	N/A
Search Results	Case Number, Subject, Status, Date/Time Opened, Case Owner Alias	N/A

**13. Open Menu**

**14. Edit**

**11. Search Layouts**

**15. Move Quick Action from Available to Selected**

**Cases List View**

Customize the buttons on the Cases list view:

- To remove any standard buttons, remove the check next to the standard button name.
- To add custom buttons, select them and click Add.

Standard Buttons
<input checked="" type="checkbox"/> New [NewCase]
<input checked="" type="checkbox"/> Accept [Accept]
<input checked="" type="checkbox"/> Close [MassClose]
<input checked="" type="checkbox"/> Change Owner [ChangeOwner]
<input checked="" type="checkbox"/> Change Status [ChangeStatus]

**Custom Buttons**

[Click here to create a new custom list button](#)

**List View Actions in Lightning Experience**

Available Quick Actions	Selected Quick Actions
New Child Case	Close Social Media Case

# List View Buttons (Quick Action)



The screenshot shows a Salesforce list view for 'My Open Social Media Cases'. The header bar includes a 'New' button and a 'Close Social Media Case' button, which is circled in red. Below the header, there is a table with columns: CASE N..., CONTACT N..., SUBJECT, STATUS, CASE REA..., TYPE, PRIOR..., DATE/TIME O..., and CA... The table contains one row with the following data: 1, 00002283, Street Youth ..., Post from Str..., New, Other, Other, Medium, 12/29/2017 ..., Terry.

	CASE N...	CONTACT N...	SUBJECT	STATUS	CASE REA...	TYPE	PRIOR...	DATE/TIME O...	CA...
1	00002283	Street Youth ...	Post from Str...	New	Other	Other	Medium	12/29/2017 ...	Terry

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:

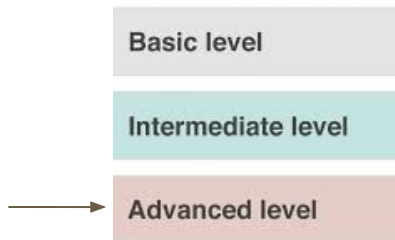
[https://developer.salesforce.com/docs/atlas.en-us.pages.meta/pages/pages\\_controller\\_sosc\\_custom\\_button.htm](https://developer.salesforce.com/docs/atlas.en-us.pages.meta/pages/pages_controller_sosc_custom_button.htm)

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>





# 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?



Check out Reporting Presentation on [Mightyforce.blog](http://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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## Power-up Your List Views

Slides on [Mightyforce.org](https://Mightyforce.org)

Terry Cole

[terry@StreetYouthMinistry.org](mailto:terry@StreetYouthMinistry.org)

@streetyouth

[StreetYouthMinistry.org](https://StreetYouthMinistry.org)

Blog: [MightyForce.org](https://MightyForce.org)

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