

Account List Views

Salesforce Account List Views

As we are realigning our territories it is important that you have an account list in Salesforce to see what accounts you are responsible for calling on. Please reach out to your team Salesforce Champion if you have any questions.



Select any account list view from the ACCOUNT Tab on the salesforce tool bar.

Accounts





Top right of screen: Click the GEAR. From the drop list, select CLONE.

Select Fields to Display Delete Reset Column Widths	
2	Clone List View
Pop-Up: Name the report what you wish for it to be called. Only you will see this list view	*List Name Name the report as you wish Who sees this list view?

Only I can see this list view

All users can see this list view

Share list view with groups of users 1

			Cancel	Save					
Cancel	•								
Filter by Owner My accounts Matching all of these filters		Filters Box: (it will por right side of the scree Create or Add filters fields in the picture (op up on the en) to reflect th	ne					
Do Not Use equals False	×	• If you only call	 If you only call on Top-Big City only call on Top-Big 						
Account Record Type equals Veterinary	×	in the classific You choose w	ation filter. hat filters go	D					
Account Status not equal to Disqualified	×	Once you are done c	lick save.						
Classification* equals Hi Potential, PSM/PETCO, Rural, Core, Low Volume, Top-Big City, Top-Small City	×								

Add Filter

Remove All

To select Fields to display: Select the **GEAR** and from the drop down list SELECT FIELD TO DISPLAY. The pop up below will appear. Select the field you want as a header and click the arrow facing right to move it to the visible field. If you want to remove a visible field, select the left facing arrow to return it to the Available Fields.

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_	LIST VIEW CONTROLS	
ckl	New	
ac	Clone	
dair	Rename	
_	Sharing Settings	ese filters
_	Edit List Filters	
-	Select Fields to Display	
-	Delete	List View Controls
-	Reset Column Widths	у

Select Fields to Display





50+ items • Sorted by Account Name • Filtered by My accounts - 4 more filters applied • Updated 6 minutes ago										C	Q. Search this list					
		Ship To Custo 🗸	Account Name 🕇 🗸	Practice Type 🛛 🗸	Shippi 🗸	Shipping City \sim	s ∨	Shipping \lor	# ~	Business Email 🛛 🗸	Ac ∨	Bl \vee	OLP Affilia \vee	Cli ~	Website	/
1		VET-0015887-001	Ackley Veterinar	General Practicin	202 She	ACKLEY	IA	50601	2	ackleyvet@hotm	dal		No Affiliation	IND	http://www.ackl	i
2		VET-0022286-001	ACORN HILL VE	General Practicin	RR1 BO	MEMPHIS	мо	63555	1	cek352@gmail.c	dal		No Affiliation	IND	https://www.fac	l
3		VET-0005392-001	Adair County Ve	General Practicin	407 SE	GREENFIELD	IA	50849	1	adaircountyvetcl	dal		VFC/Covetr	IND	http://www.adair	l
4		VET-0024192-001	ADEL VETERINA	General Practicin	619 GR	ADEL	IA	50003	3	melisha.adelvet	dal		VFC/Covetr	VGP		l
5		VET-0010008-001	Adel Veterinany	General Practicin	619 GR	ADEL	IA	50003	2	torinc@mchsi.co	dal			IND		

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Alexander - SFAccount List Views