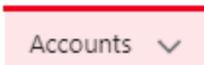


Account List Views

Salesforce Account List Views

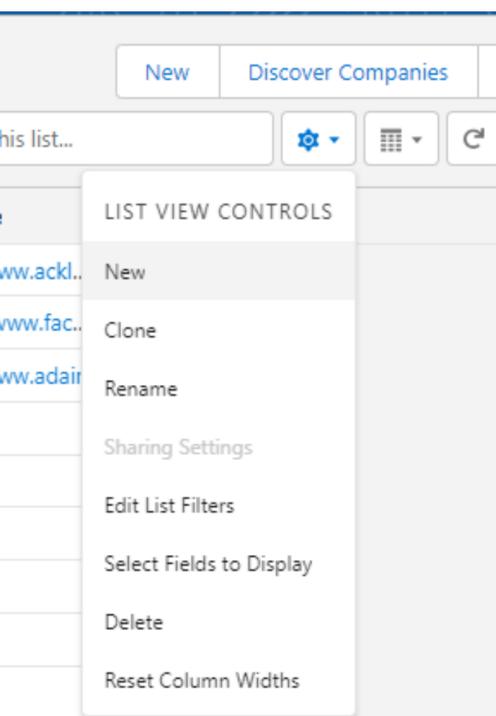
As we are realigning our territories it is important that you have an account list in Salesforce to see what accounts you are responsible for calling on. Please reach out to your team Salesforce Champion if you have any questions.

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



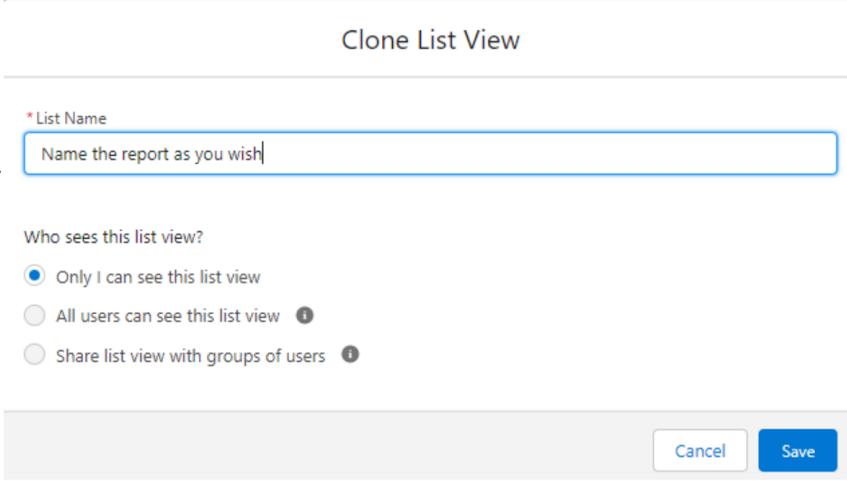
2

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



3

Pop-Up: **Name the report** what you wish for it to be called. Only you will see this list view.

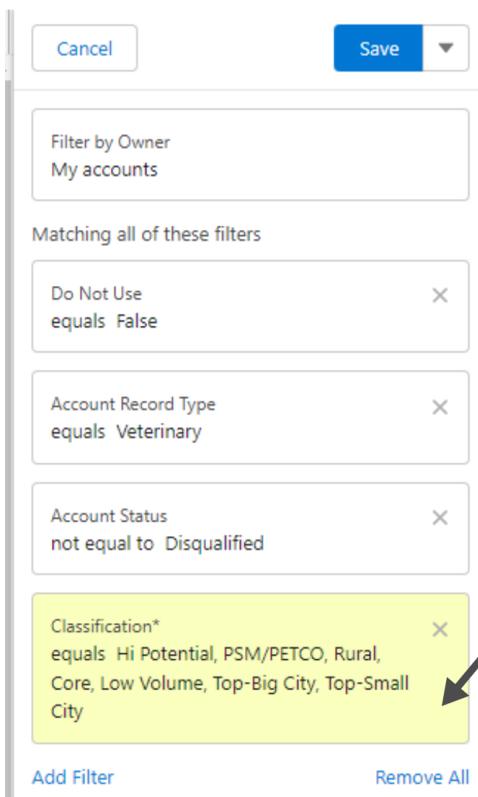


4

Filters Box: (it will pop up on the right side of the screen) **Create or Add** filters to reflect the fields in the picture (to the right)

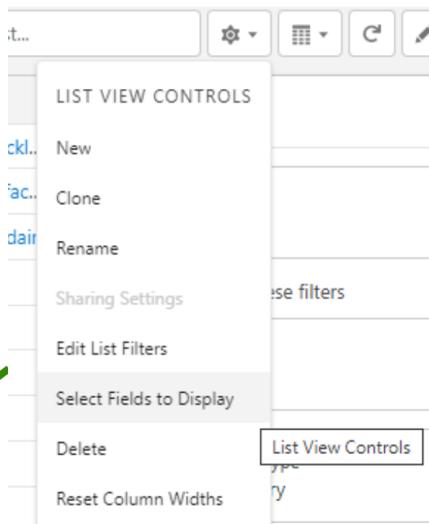
- If you only call on Top-Big City, only put in Top-Big City in the classification filter. You choose what filters go here.

Once you are done click **save**.

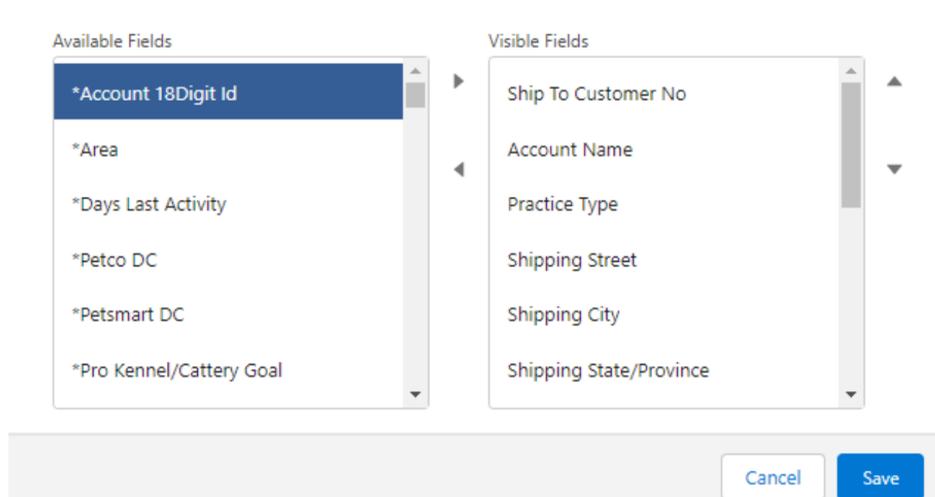


5

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.



Select Fields to Display



6

Your list will appear once you click **SAVE**. **Close the Filter Box.**

50+ Items • Sorted by Account Name • Filtered by My accounts - 4 more filters applied • Updated 6 minutes ago

	Ship To Custo...	Account Name ↑	Practice Type	Shippi...	Shipping City	S...	Shipping ...	# ...	Business Email	Ac...	Bl...	OLP Affilia...	Cil...	Website	
1	<input type="checkbox"/>	VET-0015887-001	ACKLEY Veterinar...	General Practicin...	202 She...	ACKLEY	IA	50601	2	ackleyvet@hotmail.com	dal...	<input type="checkbox"/>	No Affiliation	IND	http://www.ackl...
2	<input type="checkbox"/>	VET-0022286-001	ACORN HILL VE...	General Practicin...	RR1 BO...	MEMPHIS	MO	63555	1	cek352@gmail.c...	dal...	<input type="checkbox"/>	No Affiliation	IND	https://www.fac...
3	<input type="checkbox"/>	VET-0005392-001	Adair County Ve...	General Practicin...	407 SE ...	GREENFIELD	IA	50849	1	adaircountyvetd...	dal...	<input type="checkbox"/>	VFC/Covetr...	IND	http://www.adair...
4	<input type="checkbox"/>	VET-0024192-001	ADEL VETERINA...	General Practicin...	619 GR...	ADEL	IA	50003	3	melishaadelvet...	dal...	<input type="checkbox"/>	VFC/Covetr...	VGP	
5	<input type="checkbox"/>	VET-0010008-001	Adel Veterinary ...	General Practicin...	619 GR...	ADEL	IA	50003	2	tprinc@mchsi.co...	dal...	<input checked="" type="checkbox"/>		IND	