



List Views

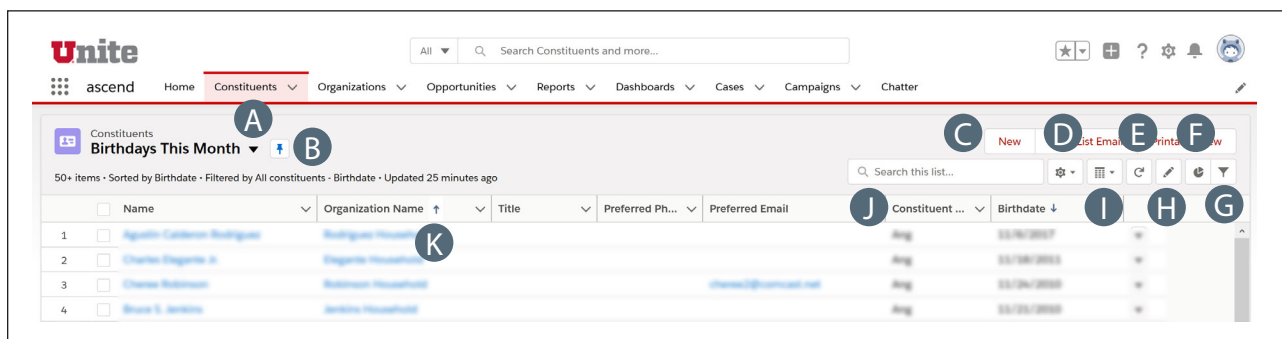
Introduction to List Views

List Views

A List View is a feature that displays a specific set of object records (e.g. Constituents, Organization, Opportunities)

Menus and Icons

- A List View drop down menu: ▼ Access available list views.
- B Pin list icon*: 📌 Pin a list view.
- C New: Add a new record.
- D List View controls menu: ⚙ Access list view actions, including creating, renaming, cloning, and sharing.
- E Refresh icon: ↻ Get a fresh view of a list more quickly than doing a full page reload.
- F Charts icon: 📊 Transform list data into simple and easy-to-understand charts.
- G Filter icon: ▼ Narrow or expand the records that appear in a list view by adding or modifying filters.
- H Edit icon: ✎ Update fields in your list.
- I Layout icon*: 📄 Toggle between displaying lists in the standard table view, split view (list on the left side, plus details for the selected record on the right), or the Kanban view.
- J Search: Search among listed records.
- K Sort: ↑ Sort records by column.

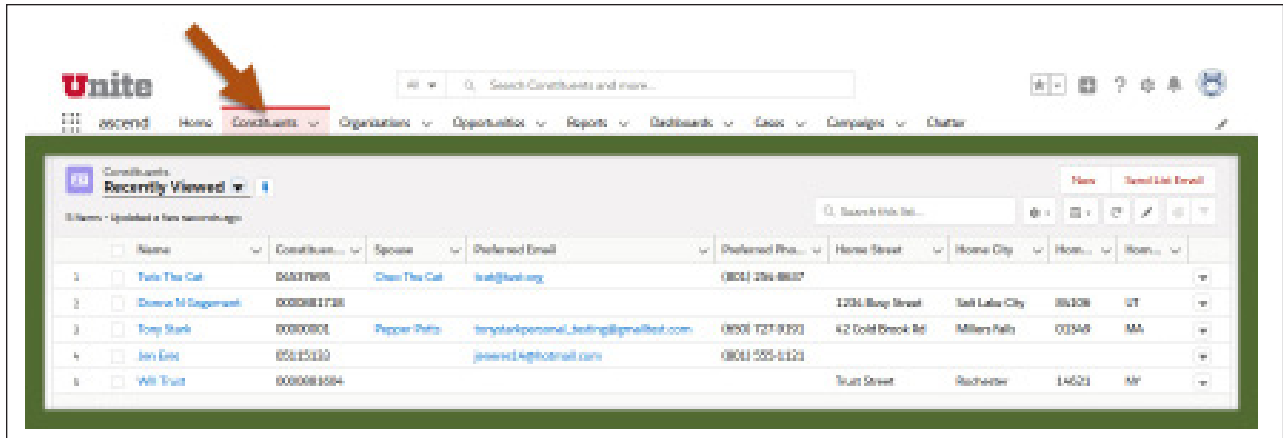


For instructions on how to pin a list and adjust the layout see the [Customizing List Views Guide](#). Some features may not be available for all users.



Access Recently Viewed List

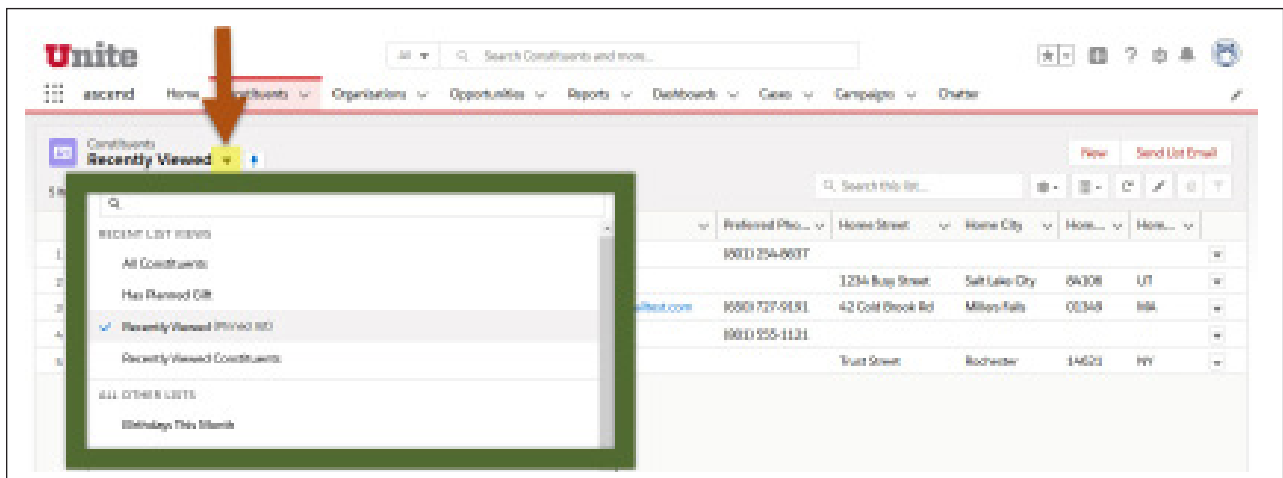
- 1 Click on the object tab name (e.g. Constituents, Organizations, Opportunities) to see the recently viewed list for that record type.



Click on the arrow next to the object tab name to see a drop down of recent records and lists for that object.

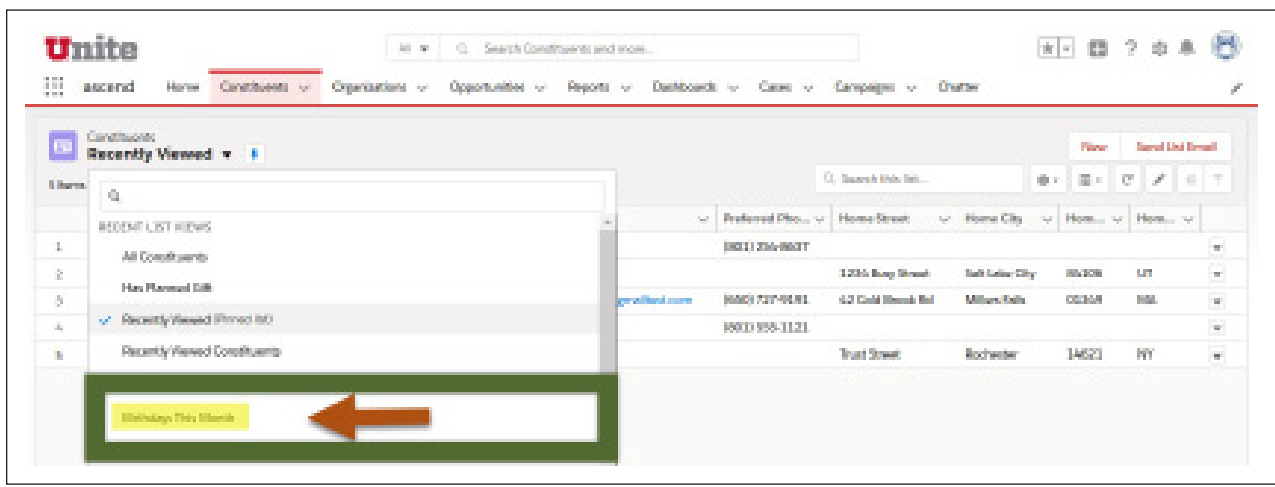
Change the List View

- 1 Click on the drop down next to the list name to view different list options.





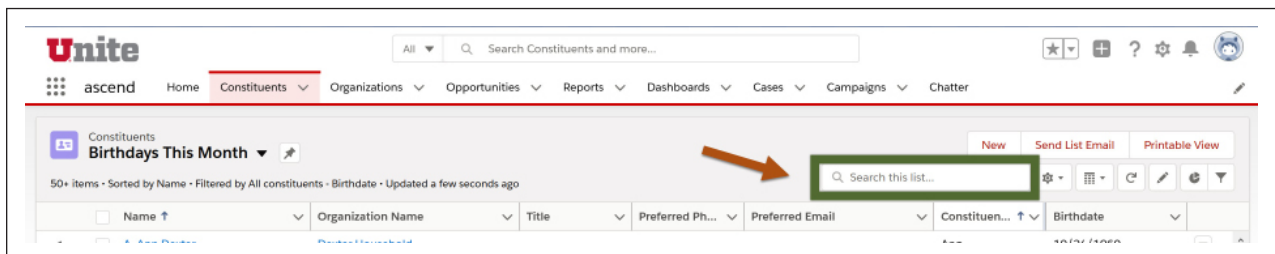
2 Click on the desired list.



Search List View

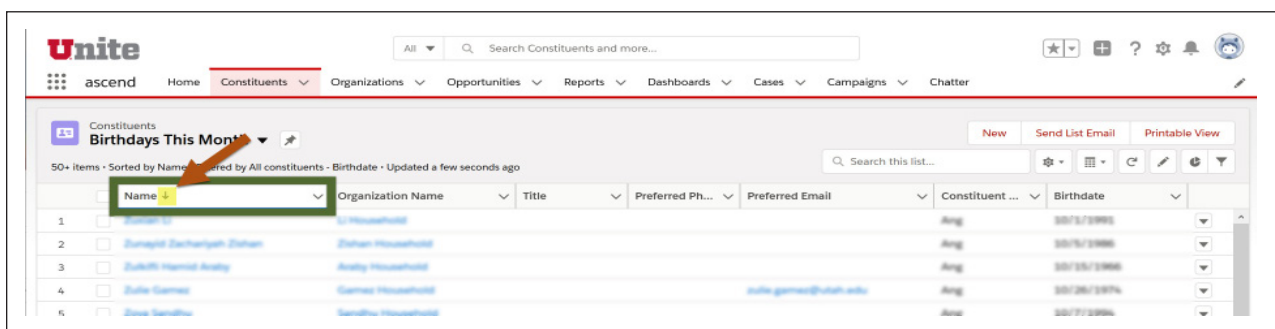
Search Within the List View

1 Click on the “Search this list...” box to search items in the current list view.



Sort Search Results

1 Sort this list by any column by hovering over the field name and then clicking on the small blue arrow that appears next to the field title.





Refresh

Refresh the List View

- 1 Click on the Refresh button to get a fresh view more quickly than doing a full page reload.

