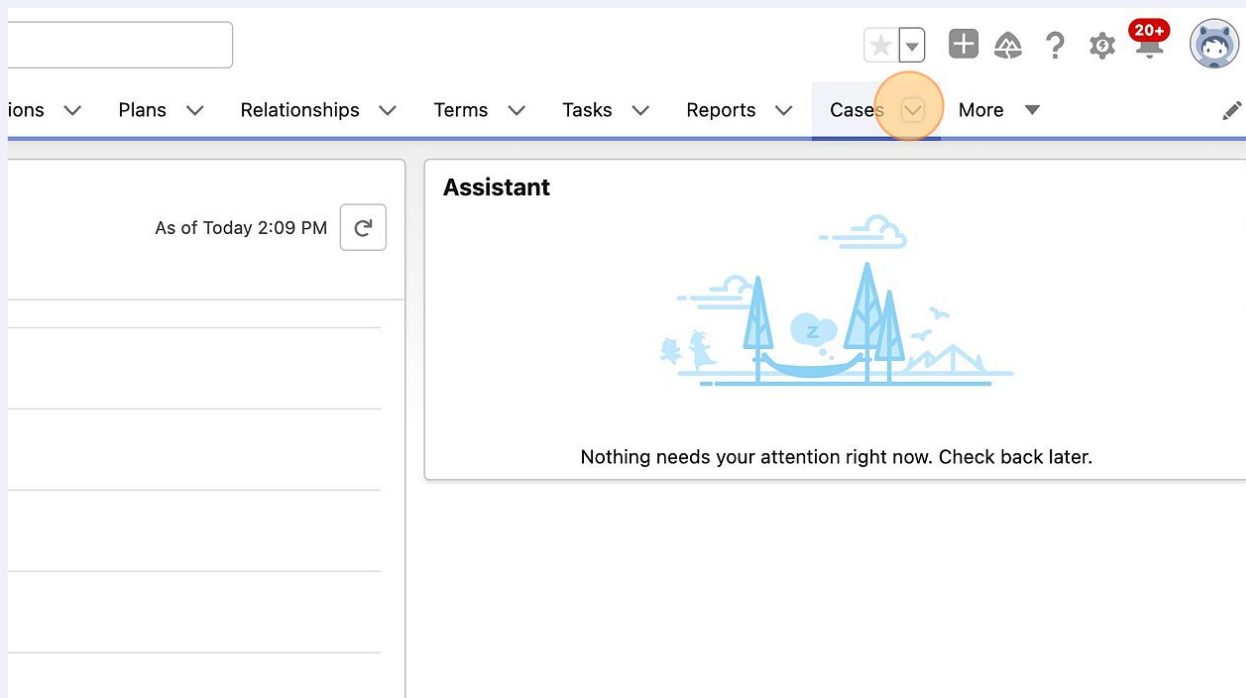# How to create list view for cases

Step by step on how to create the list view for your programs cases.

1 Navigate to fiucrm.lightning.force.com/lightning/page/home

2 Click here.

3   Click a previous created view

00001101

00001069

00001083

00001082

00001099

Recent lists

MSF In-Person Cases Spring/Fall 2023

OMSIRE Cases Spring/Fall 2023

OMSF Cases Spring/FALL 2023

Admission Task - MSIRE

Nothing needs yo

Aug

---

4   Click the gear icon.

| ...ions ∨ | Plans ∨ | Relationships ∨ | Terms ∨ | Tasks ∨ | Reports ∨ | Cases ∨ | More ▾ |

New   Change Owner   Merge Cases   Printable View

🔍 Search this list...

...Opened	∨	Case Owner Alias	∨	Queue	∨	Request	∨	
...0:55 AM		Chapman Admissions		Chapman Admissions		Calculate Domestic GPA		▼
...1:17 AM		Chapman Admissions		Chapman Admissions		Calculate Domestic GPA FIU		▼
...1:37 AM		Chapman Admissions		Chapman Admissions		Calculate Domestic GPA FIU		▼
...2:25 PM		Global Recruitment		Global Recruitment				▼
...9:50 AM		Chapman Admissions		Chapman Admissions				▼
...12:48 PM		Chapman Admissions		Chapman Admissions		Calculate Domestic GPA FIU		▼
...12:08 PM		Chapman Admissions		Chapman Admissions		Review International Credentials		▼
...12:08 PM		Chapman Admissions		Chapman Admissions		Citizenship/Residency Update		▼
...:57 PM		Chapman Admissions		Chapman Admissions		Calculate Domestic GPA FIU		▼

5 Click "New"

Opened	Case Owner Alias	Queue	LIST VIEW CONTROLS		
0:55 AM	Chapman Admissions	Chapman Admissions	New	c GPA	▼
1:17 AM	Chapman Admissions	Chapman Admissions		c GPA FIU	▼
1:37 AM	Chapman Admissions	Chapman Admissions	Clone	c GPA FIU	▼
2:25 PM	Global Recruitment	Global Recruitment	Rename		▼
9:50 AM	Chapman Admissions	Chapman Admissions	Sharing Settings		▼
12:48 PM	Chapman Admissions	Chapman Admissions	Edit List Filters	c GPA FIU	▼
12:08 PM	Chapman Admissions	Chapman Admissions	Select Fields to Display	al Credentials	▼
12:08 PM	Chapman Admissions	Chapman Admissions	Delete	ncy Update	▼
57 PM	Chapman Admissions	Chapman Admissions		c GPA FIU	▼

Top navigation: ions ∨ | Plans ∨ | Relationships ∨ | Terms ∨ | Tasks ∨ | Reports ∨ | Cases ∨ | More ▼

Buttons: New | Change Owner | Merge Cases | Printable View

Search this list...

6 Type the name of your program and year or years of cases you are wanting to view.

7 Click "all users". This is important so that anyone can view your cases.

085	Natalie Gonzalez	3324932	New	Medium	3/8/2023, 12:25 PM
086	Natalie Gonzalez	3324932			
087	Natalie Gonzalez	3324932			
088	Natalie Gonzalez	3324932			
089	Natalie Gonzalez	3324932			
091	Natalie Gonzalez	3324932			
092	Natalie Gonzalez	3324932			
096	Natalie Gonzalez	3324932			
098	Natalie Gonzalez	3324932			
099	Natalie Gonzalez	3324932			
101	Natalie Gonzalez	3324932			

New List View

* List Name

MSF Cases Spring/Fall 2023

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 ⓘ

---

8 Click "Save"

...023

...view

...ist view ⓘ

...oups of users ⓘ

Cancel   Save

Chapman Admissions	Review International ...
Chapman Admissions	Citizenship/Residency Up...
Chapman Admissions	Calculate Domestic GPA
Global Recruitment	
Chapman Admissions	Refer Application
Chapman Admissions	Calculate Domestic GPA
Chapman Admissions	Calculate Domestic GPA
Chapman Admissions	Calculate Domestic GPA
Chapman Admissions	Calculate Domestic GPA

9 Click "Filter by Owner My cases"

| | Plans ∨ | Relationships ∨ | Terms ∨ | Tasks ∨ | Reports ∨ | Cases ∨ | More ▼ | ✏ |

New | Change Owner | Merge Cases | Printable View

🔍 Search this list...   ⚙▼ ▦▼ ↻ ✏ 📊 ▼

| | ∨ | **Priority** | ∨ | **Case Owner Alias** | ∨ |

Filters   ✕

Filter by Owner
My cases

Add Filter   **Remove All**

---

10 Click "All Cases"

🔍 Search...

| il Templates ∨ | Campaigns ∨ | Interactions ∨ | Plans ∨ | Relationships ∨ | Terms ∨ | Tasks ∨ | Reports ∨ |

New | Change Ow

🔍 Search this list...

| | ∨ | **Status** | ∨ | **Priority** |

Filter by Owner
All cases

◉ My cases

○ My case teams

○ Filter by scope

○ Queue owned cases

Filt

Fil
M

Add

Done

11   Click "Done"

New   Change Owner   Merge Cases   Printable View

Search this list...

	Priority

Filter by Owner
- ● All cases
- ○ My cases
- ○ My case teams
- ○ Filter by scope
- ○ Queue owned cases

Done

Filters   ✕

Filter by Owner
My cases

Add Filter   Remove All

---

12   Click "Add Filter"

New   Change Owner   Merge Cases   Printable View

Search this list...

	Priority		Case Owner Alias	

Cancel   Save ▾

Filter by Owner
All cases

Add Filter   Remove All

13 Click first drop down field to change.

New   Change Owner   Merge Cases   Printable View

🔍 Search this list...   ⚙▼ ▦▼ ↻ ✏ 📊 ▼

| ⌄ | Priority | ⌄ | Case Owner Alias | ⌄ |

Cancel   Save ▼

Field
Account Name   ▼

Operator
equals   ▼

Value

Done

Filter by Owner
All cases

Matching all of these filters

New Filter*   ✕

Add Filter   Remove All

Add Filter Logic

---

14 Click "Plan"

| tus | Priority | Case Owner Alias | ⌄ |

Cancel

Field
Account Name   ▼

Owner Name

Panther Id

Parent Case Number

Plan

Priority

Queue

Reconsideration

Request

Status

Subject

Term

Filter by Owner
All cases

Matching all of these filters

New Filter*

Add Filter

Add Filter Logic

15 Click the "Value" field.

Field

Plan ▼

Operator

equals ▼

Value

Done

Filter by Owner
All cases

Matching all of these filte

New Filter*

Add Filter

Add Filter Logic

display.

16 Type your program code name. Very specific

17   Click "Done"

Plan ▼

Operator

equals ▼

Value

Finance - MSF

Done

Filter by Owner
All cases

Matching all of these filters

New Filter*   ✕

Add Filter   Remove All

Add Filter Logic

---

18   Click "Add Filter"

Priority   Case Owner Alias

Cancel   Save ▼

Filter by Owner
All cases

Matching all of these filters

Plan*   ✕
equals Finance - MSF

Add Filter   Remove All

Add Filter Logic

19 Click dropdown to change field.

Q Search this list...

| ∨ | Priority | ∨ | Case Owner Alias | ∨ |

Cancel   Save ▼

Filter by Owner
All cases

Field
Account Name ▼

Matching all of these filters

Operator
equals ▼

Plan*
equals Finance – MSF   ✕

New Filter*   ✕

Value

Add Filter   Remove All

Done

Add Filter Logic

---

20 Click "Opportunity"

Filter by Owner
All cases

Field
Account Name ▼

Matching all of these filter

Last Name

Location

Occurrence Date

Plan*
equals Finance – MSF

Opportunity

New Filter*

Owner First Name

Owner Last Name

Add Filter

Owner Name

Add Filter Logic

Panther Id

isplay.

Parent Case Number

Plan

Priority

21 Click dropdown to change field.

Cancel   Save ▼

Filter by Owner
All cases

Field

Opportunity   ▼

Matching all of these filters

Plan*   ✕
equals Finance - MSF

Operator

equals   ▼

New Filter*   ✕

Value

Add Filter   Remove All

Done

Add Filter Logic

---

22 Click "contains"

equals   ▼

New Filter*

✓ equals

Add Filter

not equal to

less than

Add Filter Logic

greater than

ay.

less or equal

greater or equal

contains

does not contain

starts with

23 Click the "Value" field.

Field

Opportunity ▾

Operator

contains ▾

Value

|

Done

All cases

Matching all of th

Plan*
equals Finance

New Filter*

Add Filter

Add Filter Logic

:ems to display.

24 Type the "Start, TERM and Year" Example: Fall Term 2023

25 Click "Done"

Opportunity ▾

Operator

contains ▾

Value

Fall Term 2023

Done

Plan* ✕
equals Finance - MSF

New Filter* ✕

Add Filter   Remove All

Add Filter Logic

---

26 Click "Add Filter"

All cases

Matching all of these filters

Plan* ✕
equals Finance - MSF

Opportunity* ✕
contains Fall Term 2023

Add Filter   Remove All

Add Filter Logic

27   Click dropdown to change field.

Priority   Case Owner Alias

Cancel   Save

Filter by Owner
All cases

Matching all of these filters

Field
Account Name

Operator
equals

Value

Done

Plan*
equals Finance - MSF   ✕

Opportunity*
contains Fall Term 2023   ✕

New Filter*   ✕

Add Filter   Remove All

Add Filter Logic

---

28   Click "Opportunity"

Field
Account Name

Last Name

Location

Occurrence Date

Opportunity

Owner First Name

Owner Last Name

Owner Name

Panther Id

Parent Case Number

Plan

Priority

Plan*
equals Finance -

Opportunity*
contains Fall Tern

New Filter*

Add Filter

Add Filter Logic

s to display.

29 Click dropdown to change field.

All cases

Matching all of these filters

Plan*
equals Finance - MSF   ×

Field

Opportunity ▼

Opportunity*   ×
contains Fall Term 2023

Operator

equals ▼

New Filter*   ×

Value

Add Filter   Remove All

Add Filter Logic

Done

---

30 Click "contains"

equals ▼

New Filter*

✓ equals

Add Filter

not equal to

Add Filter Logic

play.

less than

greater than

less or equal

greater or equal

contains

does not contain

starts with

31 Click the "Value" field.

Field

Opportunity ▾

Operator

contains ▾

Value

|

Done

Plan*
equals Finance –

Opportunity*
contains Fall Terr

New Filter*

Add Filter

Add Filter Logic

ns to display.

32 Type another start time, term and year. If needed.

33 Click "Done"

Opportunity ▼

Operator

contains ▼

Value

Spring Term 2023

Done

Opportunity*   ✕
contains Fall Term 2023

New Filter*   ✕

Add Filter   Remove All

Add Filter Logic

---

34 Click "Add Filter"

Plan*   ✕
equals Finance - MSF

Opportunity*   ✕
contains Fall Term 2023

Opportunity*   ✕
contains Spring Term 2023

Add Filter   Remove All

Add Filter Logic

35 Click dropdown to change field.

All cases

Matching all of these filters

Plan*
equals Finance - MSF ×

Opportunity*
contains Fall Term 2023 ×

Opportunity*
contains Spring Term 2023 ×

New Filter* ×

Field

Account Name

Operator

equals

Value

Add Filter   Remove All

Add Filter Logic

Done

36 Click "Category"

display.

✓ Account Name

Case Number

Case Origin

Case Owner Alias

Case Reason

Case Record Type

Case Source

Category

Closed

Contact Account Name

Contact Name

Created By Alias

Date/Time Closed

contains Spring Term

New Filter*

Add Filter

Add Filter Logic

37 Click dropdown to change field.

Plan*
equals Finance - MSF   ✕

Opportunity*
contains Fall Term 2023   ✕

Opportunity*
contains Spring Term 2023   ✕

New Filter*   ✕

Add Filter   Remove A

Add Filter Logic

Field
Category ▼

Operator
equals ▼

Value
0 options selected

Done

---

38 Click "contains"

to display.

Operator
equals ▼

✓ equals

not equal to

less than

greater than

less or equal

greater or equal

contains

does not contain

starts with

New Filter*

Add Filter

Add Filter Logic

39 Click dropdown to change field.

Field

Category ▼

Operator

contains ▼

Value

0 options selected

Done

Opportunity*
contains Fall Term 2023

Opportunity*
contains Spring Term 2023

New Filter*

Add Filter

Add Filter Logic

---

40 Click "Admissions"

to display.

Field

Category ▼

Operator

contains ▼

Admissions

Intl. Student Services

Other

Scanning Operations

Done

equals Finance - M

Opportunity*
contains Fall Term 2

Opportunity*
contains Spring Ter

New Filter*

Add Filter

Add Filter Logic

41 Click "Intl. Student Services"

Field

Category ▼

Operator

contains ▼

✓ Admissions

Intl. Student Services

Other

Scanning Operations

Done

display.

Opportunity*
contains Fall Term 202

Opportunity*
contains Spring Term

New Filter*

Add Filter

Add Filter Logic

---

42 Click "Other"

Field

Category ▼

Operator

contains ▼

✓ Admissions

✓ Intl. Student Services

Other

Scanning Operations

Done

s to display.

contains Fall Term

Opportunity*
contains Spring T

New Filter*

Add Filter

Add Filter Logic

43   Click "Done"

Category ▼

Operator

contains ▼

✔ Admissions

✔ Intl. Student Services

✔ Other

Scanning Operations

Done

Opportunity*
contains Spring Term 2023   ✕

New Filter*   ✕

Add Filter   Remove All

Add Filter Logic

---

44   Click "Add Filter Logic"

Opportunity*
contains Spring Term 2023   ✕

Category*
contains Admissions, Intl. Student
Services, Other   ✕

Add Filter   Remove All

Add Filter Logic

45 Click the "Filter Logic" field.

3. contains Spring Term 2023

Category*
contains Admissions, Intl. Student
4. Services, Other

Add Filter   Remove All

Filter Logic ⓘ   Remove

1 AND 2 AND 3 AND 4

46 Filter Logic must have certain marks in order for it to populate correctly. There must be parentheses around what logic to contain

47 Click the "Filter Logic" field.

3. contains Spring Term 2023

Category*   ✕
contains Admissions, Intl. Student
4. Services, Other

Add Filter   Remove All

Filter Logic ⓘ   Remove

(1 AND 2 AND 3 AND 4

---

48 Click the "Filter Logic" field.

3. contains Spring Term 2023

Category*   ✕
contains Admissions, Intl. Student
4. Services, Other

Add Filter   Remove All

Filter Logic ⓘ   Remove

(1 AND 2) or 1 AND 3 AND 4

49   Include the word "or" between values

50   Click the "Filter Logic" field.

3. contains Spring Term 2023

Category*   ×
contains Admissions, Intl. Student
4. Services, Other

Add Filter   Remove All

Filter Logic ⓘ   Remove

(1 AND 2) or (1 AND 3 AND 4

51   Click "Save"

| ★ ▾ | ➕ | ⬡ | ? | ⚙ | 🔔 20+ | 🐾 |

ions ▾ | Plans ▾ | Relationships ▾ | Terms ▾ | Tasks ▾ | Reports ▾ | Cases ▾ | More ▾ | ✏

| New | Change Owner | Merge Cases | Printable View |

🔍 Search this list...   ⚙ ▾   ▦ ▾   ↻   ✏   ◔   ▼

| | ▾ | Priority | ▾ | Case Owner Alias | ▾ |

Cancel   Save   ▼

Filter by Owner
All cases

Matching these filters

1.   Plan*   ✕
     equals Finance - MSF

     Opportunity*   ✕