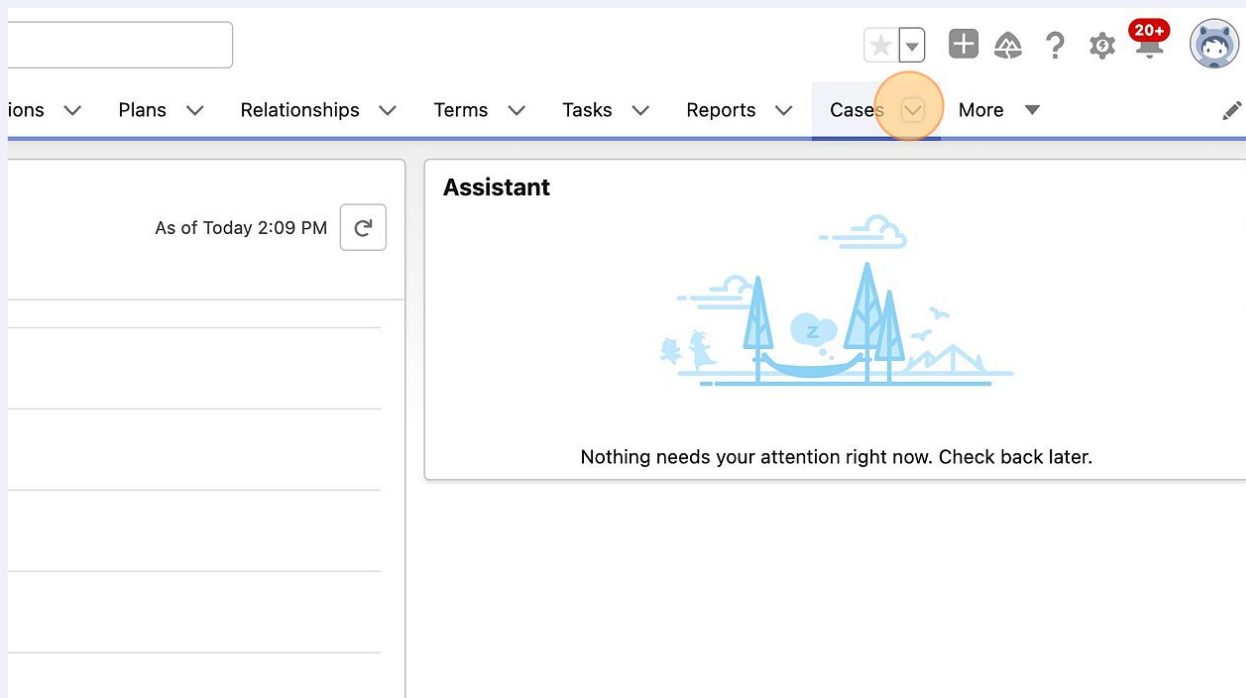


# How to create list view for cases

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

1 Navigate to [fiucrm.lightning.force.com/lightning/page/home](https://fiucrm.lightning.force.com/lightning/page/home)

2 Click here.



3 Click a previous created view

00001101  
00001069  
00001083  
00001082  
00001099

Nothing needs yo

**Recent lists**

- MSF In-Person Cases Spring/Fall 2023
- OMSIRE Cases Spring/Fall 2023
- OMSF Cases Spring/FALL 2023
- Admission Task - MSIRE

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	
3:50 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
5:57 PM	Chapman Admissions	Chapman Admissions	Calculate Domestic GPA FIU

5 Click "New"

The screenshot shows a software interface with a top navigation bar containing icons for star, add, refresh, help, settings, notifications (20+), and user profile. Below the navigation bar is a menu with items: 'ions', 'Plans', 'Relationships', 'Terms', 'Tasks', 'Reports', 'Cases', and 'More'. The 'Cases' menu is open, showing buttons for 'New', 'Change Owner', 'Merge Cases', and 'Printable View'. Below these buttons is a search bar labeled 'Search this list...' and a row of icons for settings, list view, refresh, edit, print, and filter. A table with columns 'Opened', 'Case Owner Alias', and 'Queue' is visible. A context menu is open over the table, listing actions: 'New', 'Clone', 'Rename', 'Sharing Settings', 'Edit List Filters', 'Select Fields to Display', and 'Delete'. The 'New' option is highlighted with an orange circle.

Opened	Case Owner Alias	Queue	LIST VIEW CONTROLS
10:55 AM	Chapman Admissions	Chapman Admissions	New
11:17 AM	Chapman Admissions	Chapman Admissions	Clone
11:37 AM	Chapman Admissions	Chapman Admissions	Rename
12:25 PM	Global Recruitment	Global Recruitment	Sharing Settings
12:50 AM	Chapman Admissions	Chapman Admissions	Edit List Filters
12:48 PM	Chapman Admissions	Chapman Admissions	Select Fields to Display
12:08 PM	Chapman Admissions	Chapman Admissions	Delete
12:08 PM	Chapman Admissions	Chapman Admissions	
12:57 PM	Chapman Admissions	Chapman Admissions	

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	<a href="#">3324932</a>	New	Medium	3/8/2023, 12:25 PM
086	Natalie Gonzalez	<a href="#">3324932</a>			
087	Natalie Gonzalez	<a href="#">3324932</a>			
088	Natalie Gonzalez	<a href="#">3324932</a>			
089	Natalie Gonzalez	<a href="#">3324932</a>			
091	Natalie Gonzalez	<a href="#">3324932</a>			
092	Natalie Gonzalez	<a href="#">3324932</a>			
096	Natalie Gonzalez	<a href="#">3324932</a>			
098	Natalie Gonzalez	<a href="#">3324932</a>			
099	Natalie Gonzalez	<a href="#">3324932</a>			
101	Natalie Gonzalez	<a href="#">3324932</a>			

### New List View

\* List Name

Who sees this list view?

Only I can see this list view

All users can see this list view i

Share list view with groups of users i

8

Click "Save"

view  
list view i  
groups of users i

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

Cancel Save

9

Click "Filter by Owner  
My cases"

The screenshot shows a software interface with a top navigation bar containing menu items: "ions", "Plans", "Relationships", "Terms", "Tasks", "Reports", "Cases", and "More". Below the navigation bar is a toolbar with buttons for "New", "Change Owner", "Merge Cases", and "Printable View". A search bar labeled "Search this list..." is positioned below the toolbar. The main content area features a table with columns for "Priority" and "Case Owner Alias". A "Filters" panel is open on the right side, displaying a filter rule: "Filter by Owner My cases". An orange circle highlights the "My cases" text. Below the filter rule are buttons for "Add Filter" and "Remove All".

10

Click "All Cases"

The screenshot shows a software interface with a search bar labeled "Search...". The top navigation bar includes menu items: "il Templates", "Campaigns", "Interactions", "Plans", "Relationships", "Terms", "Tasks", and "Reports". Below the navigation bar is a toolbar with buttons for "New" and "Change Ow". A search bar labeled "Search this list..." is positioned below the toolbar. The main content area features a table with columns for "Status" and "Priority". A filter selection menu is open, showing options: "Filter by Owner", "All cases", "My cases", "My case teams", "Filter by scope", and "Queue owned cases". An orange circle highlights the "All cases" option. A "Done" button is located at the bottom right of the menu.

## 11 Click "Done"

The screenshot shows a user interface for managing cases. At the top, there are buttons for 'New', 'Change Owner', 'Merge Cases', and 'Printable view'. Below these is a search bar labeled 'Search this list...' and a set of icons including a gear, a list view icon, a refresh icon, an edit icon, a pie chart icon, and a filter icon. A dropdown menu is open, showing 'Filter by Owner' with the following options: 'All cases' (selected), 'My cases', 'My case teams', 'Filter by scope', and 'Queue owned cases'. An orange circle highlights the 'Done' button at the bottom right of this menu. To the right, a 'Filters' panel is visible, containing a box with 'Filter by Owner' and 'My cases', and buttons for 'Add Filter' and 'Remove All'.

## 12 Click "Add Filter"

The screenshot shows the same user interface as in step 11. The 'Filter by Owner' dialog box is now closed, and the 'Filters' panel is updated. The 'Filter by Owner' box now contains 'All cases'. An orange circle highlights the 'Add Filter' button. The 'Filters' panel also includes a 'Cancel' button and a 'Save' button with a dropdown arrow. The table below the filters has columns for 'Priority' and 'Case Owner Alias'.

13 Click first drop down field to change.

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

New Change Owner Merge Cases Printable View

Search this list...

Priority Case Owner Alias

Field  
Account Name

Operator  
equals

Value

Done

Cancel Save

Filter by Owner  
All cases

Matching all of these filters

New Filter\*

Add Filter Remove All

Add Filter Logic

14 Click "Plan"

Priority Case Owner Alias

Field  
Account Name

- Owner Name
- Panther Id
- Parent Case Number
- Plan
- Priority
- Queue
- Reconsideration
- Request
- Status
- Subject
- Term

Cancel

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 filters

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\* X

Add Filter Remove All

Add Filter Logic

18 Click "Add Filter"

Cancel Save

Filter by Owner  
All cases

Matching all of these filters

Plan\* equals Finance - MSF X

Add Filter Remove All

Add Filter Logic

19 Click dropdown to change field.

Search this list...

Priority Case Owner Alias

Field: Account Name

Operator: equals

Value:

Done

Cancel Save

Filter by Owner: All cases

Matching all of these filters

- Plan\* equals Finance - MSF
- New Filter\*

Add Filter Remove All

Add Filter Logic

20 Click "Opportunity"

isplay.

Field: Account Name

- Last Name
- Location
- Occurrence Date
- Opportunity
- Owner First Name
- Owner Last Name
- Owner Name
- Panther Id
- Parent Case Number
- Plan
- Priority

Filter by Owner: All cases

Matching all of these filter

- Plan\* equals Finance - MSF
- New Filter\*

Add Filter

Add Filter Logic

21 Click dropdown to change field.

Field  
Opportunity

Operator  
equals

Value

Done

Filter by Owner  
All cases

Matching all of these filters

Plan\* equals Finance - MSF

New Filter\*

Add Filter Remove All

Add Filter Logic

22 Click "contains"

ay.

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

**23** Click the "Value" field.

Items to display.

Field  
Opportunity

Operator  
contains

Value  
|

Done

Plan\* equals Finance

Add Filter

Add Filter Logic

**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.

Field  
Account Name

Operator  
equals

Value

Done

Cancel Save

Filter by Owner  
All cases

Matching all of these filters

Plan\*  
equals Finance - MSF

Opportunity\*  
contains Fall Term 2023

New Filter\*

Add Filter Remove All

Add Filter Logic

28 Click "Opportunity"

is to display.

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 Term

New Filter\*

Add Filter

Add Filter Logic

29 Click dropdown to change field.

Field  
Opportunity

Operator  
equals

Value

Done

All cases

Matching all of these filters

Plan\* equals Finance - MSF

Opportunity\* contains Fall Term 2023

New Filter\*

Add Filter Remove All

Add Filter Logic

30 Click "contains"

play.

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

**31** Click the "Value" field.

is to display.

Field  
Opportunity

Operator  
contains

Value  
|

Done

Plan\*  
equals Finance -

Opportunity\*  
contains Fall Terr

New Filter\*

Add Filter

Add Filter Logic

**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.

Field  
Account Name

Operator  
equals

Value

Done

All cases

Matching all of these filters

Plan\* equals Finance - MSF

Opportunity\* contains Fall Term 2023

Opportunity\* contains Spring Term 2023

New Filter\*

Add Filter Remove All

Add Filter Logic

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

Opportunity\* contains Spring Term

New Filter\*

Add Filter

Add Filter Logic

**37** Click dropdown to change field.

Field  
Category

Operator  
equals

Value  
0 options selected

Done

Plan\* equals Finance - MSF

Opportunity\* contains Fall Term 2023

Opportunity\* contains Spring Term 2023

New Filter\*

Add Filter Remove /

Add Filter Logic

**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"

o display.

Field  
Category

Operator  
contains

Admissions

Intl. Student Services

Other

Scanning Operations

Done

Opportunity\*  
contains Fall Term 2023

Opportunity\*  
contains Spring Term 2023

New Filter\*

Add Filter

Add Filter Logic

41 Click "Intl. Student Services"

display.

Field  
Category

Operator  
contains

- ✓ Admissions
- Intl. Student Services
- Other
- Scanning Operations

Done

Opportunity\*  
contains Fall Term 202

Opportunity\*  
contains Spring Term :

New Filter\*

Add Filter

Add Filter Logic

42 Click "Other"

is to display.

Field  
Category

Operator  
contains

- ✓ Admissions
- ✓ Intl. Student Services
- Other
- Scanning Operations

Done

contains Fall Tern

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.

The screenshot shows a filter configuration interface. At the top, there are two filter items: "3. contains Spring Term 2023" and "4. Services, Other". Below these is a "Filter Logic" field containing the text "1 AND 2 AND 3 AND 4". The "Filter Logic" field is highlighted with an orange circle. The interface also includes buttons for "Add Filter", "Remove All", and "Remove".

3. contains Spring Term 2023

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

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.

The screenshot shows a filter configuration interface. It features two filter rules, each in a yellow box:

- 3. contains Spring Term 2023
- 4. Category\* contains Admissions, Intl. Student Services, Other

Below the rules are two buttons: "Add Filter" and "Remove All".

Underneath is a "Filter Logic" section with a "Remove" button. The logic field contains the text: "(1 AND 2) or (1 AND 3 AND 4)". An orange circle highlights the word "AND" between "3" and "AND 4" in the logic string.

# 51 Click "Save"

The screenshot shows a software interface with a top navigation bar containing icons for star, add, home, help, settings, notifications (20+), and a user profile. Below this is a menu bar with items: 'ions', 'Plans', 'Relationships', 'Terms', 'Tasks', 'Reports', 'Cases', and 'More'. The 'Cases' menu is open, displaying options: 'New', 'Change Owner', 'Merge Cases', and 'Printable View'. A search bar with the text 'Search this list...' is present. Below the search bar are icons for settings, list view, refresh, edit, and filter. A table with columns 'Priority' and 'Case Owner Alias' is partially visible. A modal window is open on the right, containing a 'Cancel' button, a 'Save' button (highlighted with a red circle), and filter settings. The filter settings include 'Filter by Owner' set to 'All cases' and 'Matching these filters' with two active filters: 'Plan\* equals Finance - MSF' and 'Opportunity\*'. Each filter has a close 'X' button.