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## **Salesforce**

### **Creating a View**

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## 1 Overview

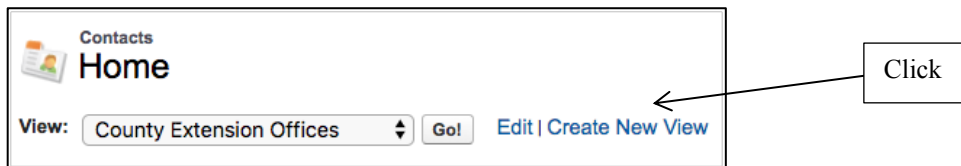
Creating a view in Salesforce allows you to see only a specific group of contacts, mail groups, or any other data. Views can be created and set up any way so that you are able to view the detail information you want to see quickly.

For more information on creating views, please refer to the following article:  
<https://help.salesforce.com/articleView?id=customviews.htm&type=5>

## 2 Create a Contact View

In this example, we will show you how to create a view for your contacts that allow you only to see the contacts in your county. Many counties already have this set up, but if this is ever deleted you can follow these steps to bring the view back.

1. Click the **Contacts** tab from the top of the Salesforce home page.
2. Click **Create New View** from the top of the page.



3. Enter a name for your view into the **View Name** field. For this example, we want to see all contacts in Allen county, so we will name the view “Allen Contacts.”

The screenshot shows a form titled 'Step 1. Enter View Name'. It has two input fields. The first is labeled 'View Name:' and contains the text 'Allen Contacts'. The second is labeled 'View Unique Name:' and contains the text 'Allen\_Contacts'. There is an information icon (i) to the right of the second field.

4. In the “Step 2” section, select **Accounts Name** from the **Field** drop-down in the “Filter By Additional Fields (Optional)” section.
5. Select **equals** from the **Operator** drop-down.
6. Enter the name of your county. For this example, we will type “Allen.”

**Note:** This is the section where you create the filter for your view. You can filter your created view by any of the options available.

**Filter By Additional Fields (Optional):**

Field	Operator	Value
Accounts Name	equals	Allen
--None--	--None--	
--None--	--None--	
--None--	--None--	
--None--	--None--	

- In the “Step 3” section you can select what fields you want to appear in your view. For example, you can add “mailing city” so you’re able to see the mailing city for every contact.

**Note:** The standard fields are already selected for you. If you are unsure how you want the view to appear you can leave the selected fields as is then edit the view at a later time.

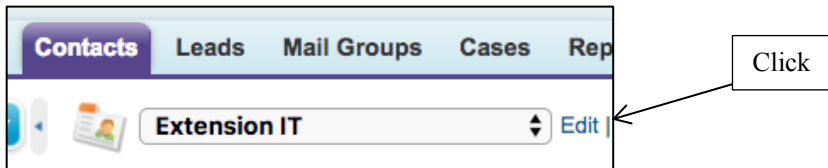
Available Fields		Selected Fields
Salutation	Add <input type="button" value="▶"/> <input type="button" value="◀"/> Remove	Name
First Name		Accounts Name
Last Name		Title
Accounts ID		Phone
Accounts Parent Accounts		Email
Reports To		Contact Owner Alias
Mailing Street		
Mailing City		
Mailing State/Province		
Mailing Zip/Postal Code		
Mailing Country		
Other Street		
Other City		
Other State/Province		
Other Zip/Postal Code		

- In the “Step 4” section, select **Visible only to me** so that the view only appears for you.
- Click **Save**.

Your view will now appear in the **View** drop-down from the main Contacts page.

### 3 Edit View

1. Click the **Contacts** tab from the top of the Salesforce home page.
2. Select the view you would like to edit from the **View** drop-down at the top of the page.
3. Click the **Edit** link next to the name of your view.



4. Make any changes you want your view, and then click **Save**.