Create a List View

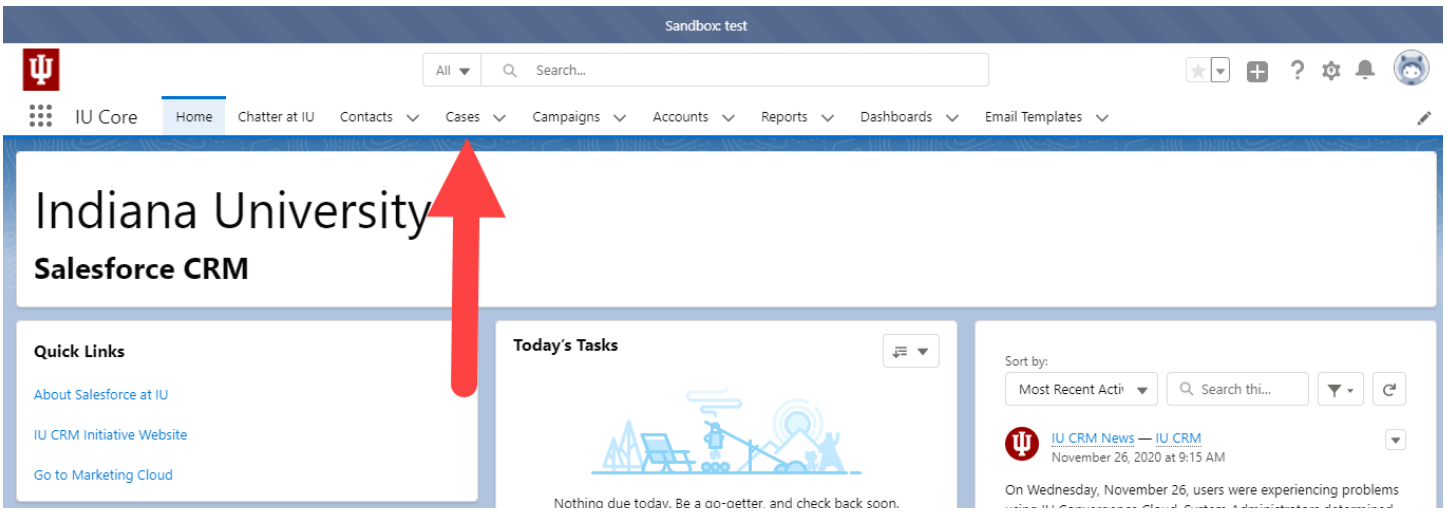
Use different List Views in CRM to see cases assigned to you, your team, classified as a certain subject, from a specific contact, and more. A List View is only visible to the person who creates it. If you create a view that you want to share with other members of your business unit, email crmhelp@iu.edu and request it be shared.

Every user should create at least one List View in CRM: A view that returns cases assigned to them. This document walks through how to create that List View.

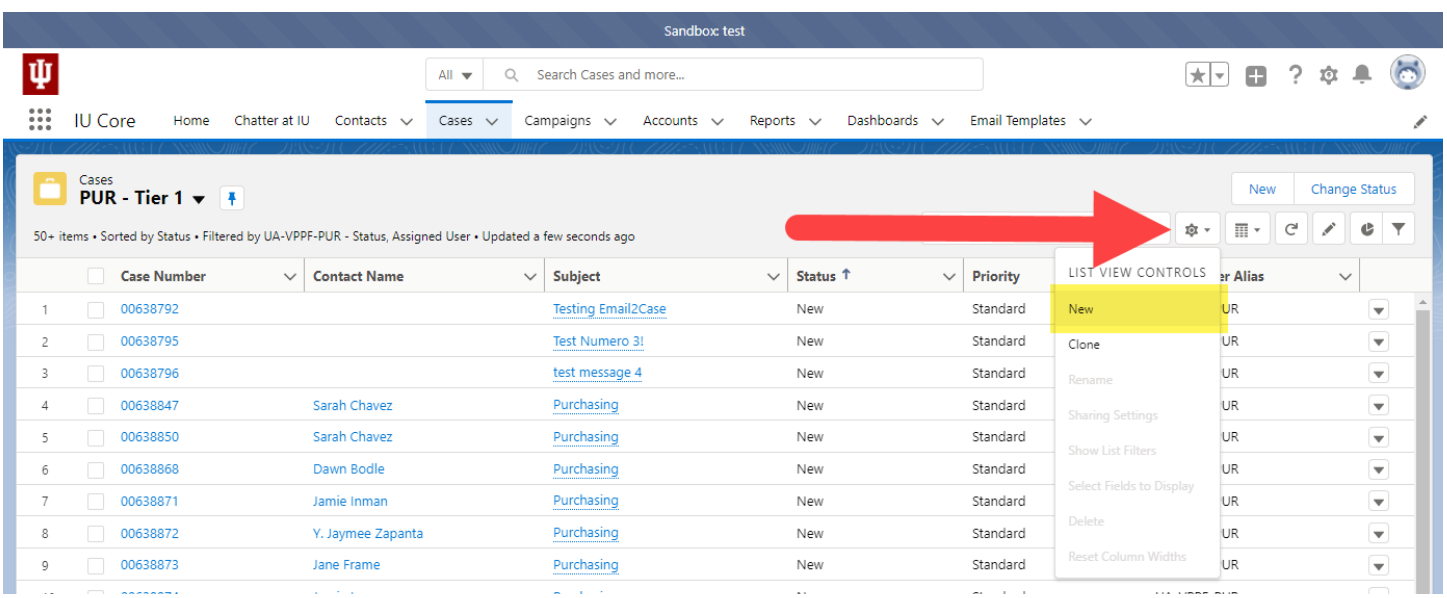
Click here to see how to change the columns displayed on a List View.

Procedure:

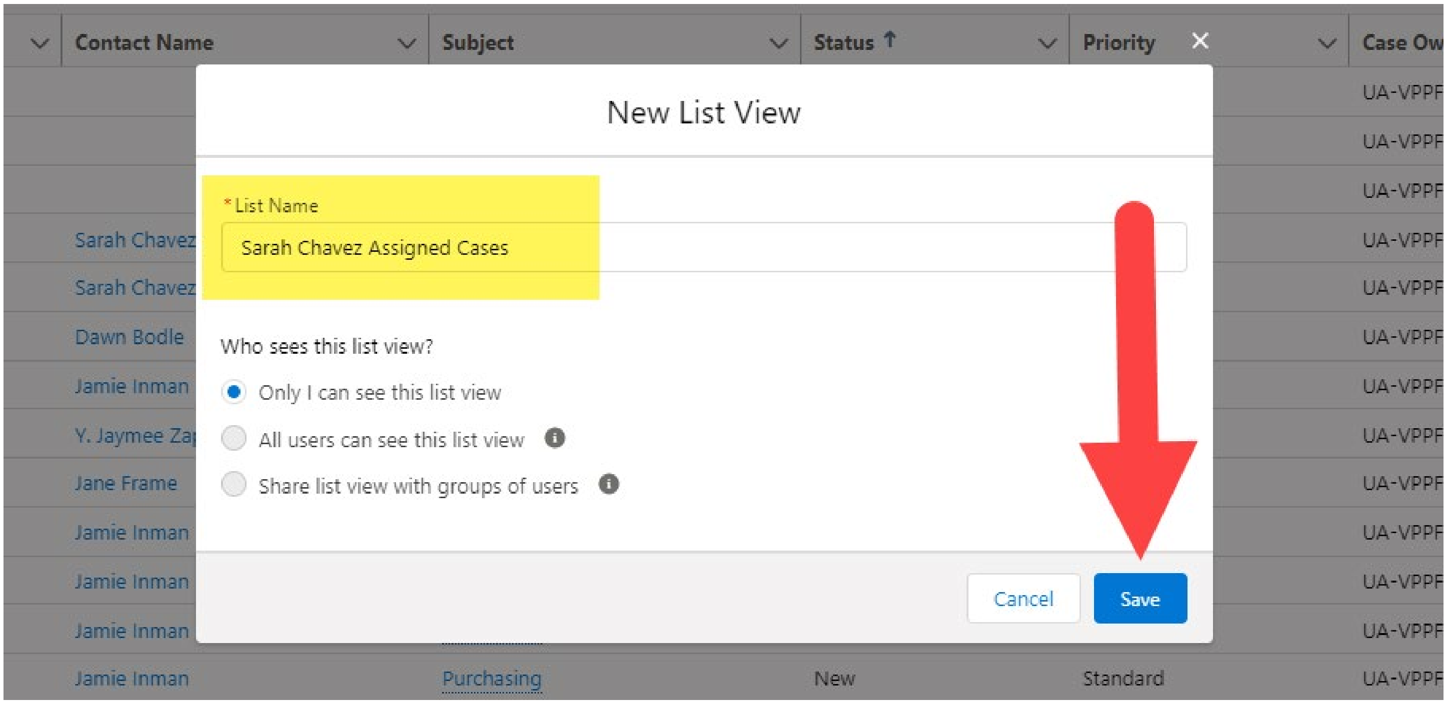
After logging in to CRM, click **Cases**.



Click the **gear icon** in the upper right-hand menu. If you want to copy the current view, select Clone. Otherwise, select New. In this example, we'll click **New**.

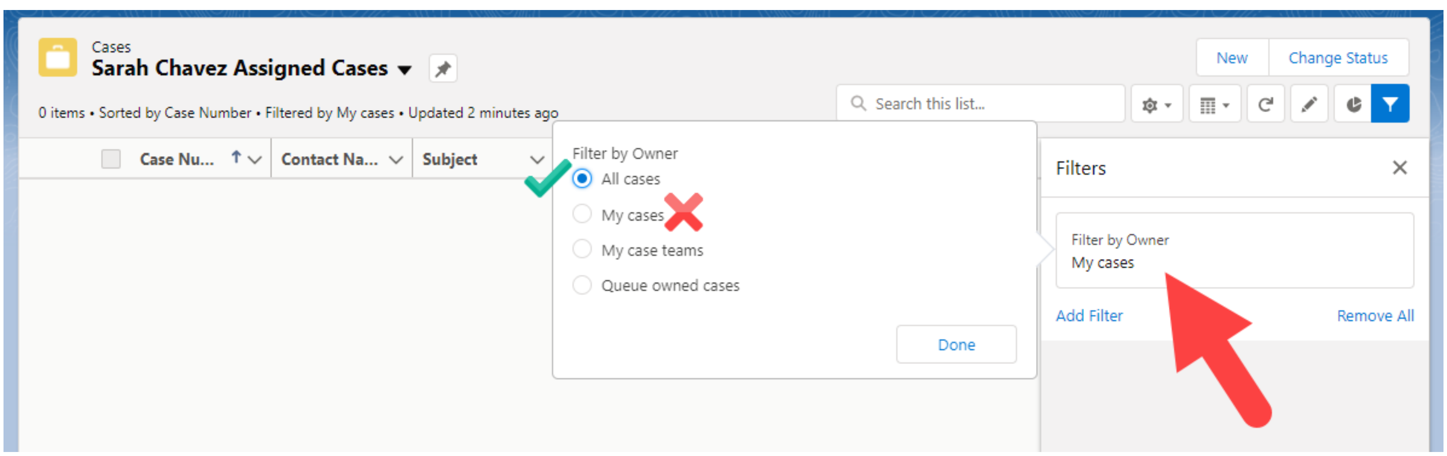


Enter a name for your List View in the **List Name** field. Here we're creating a List View so I can see cases that have been assigned to me, so I'll name it Sarah Chavez Assigned Cases. Click **Save**.

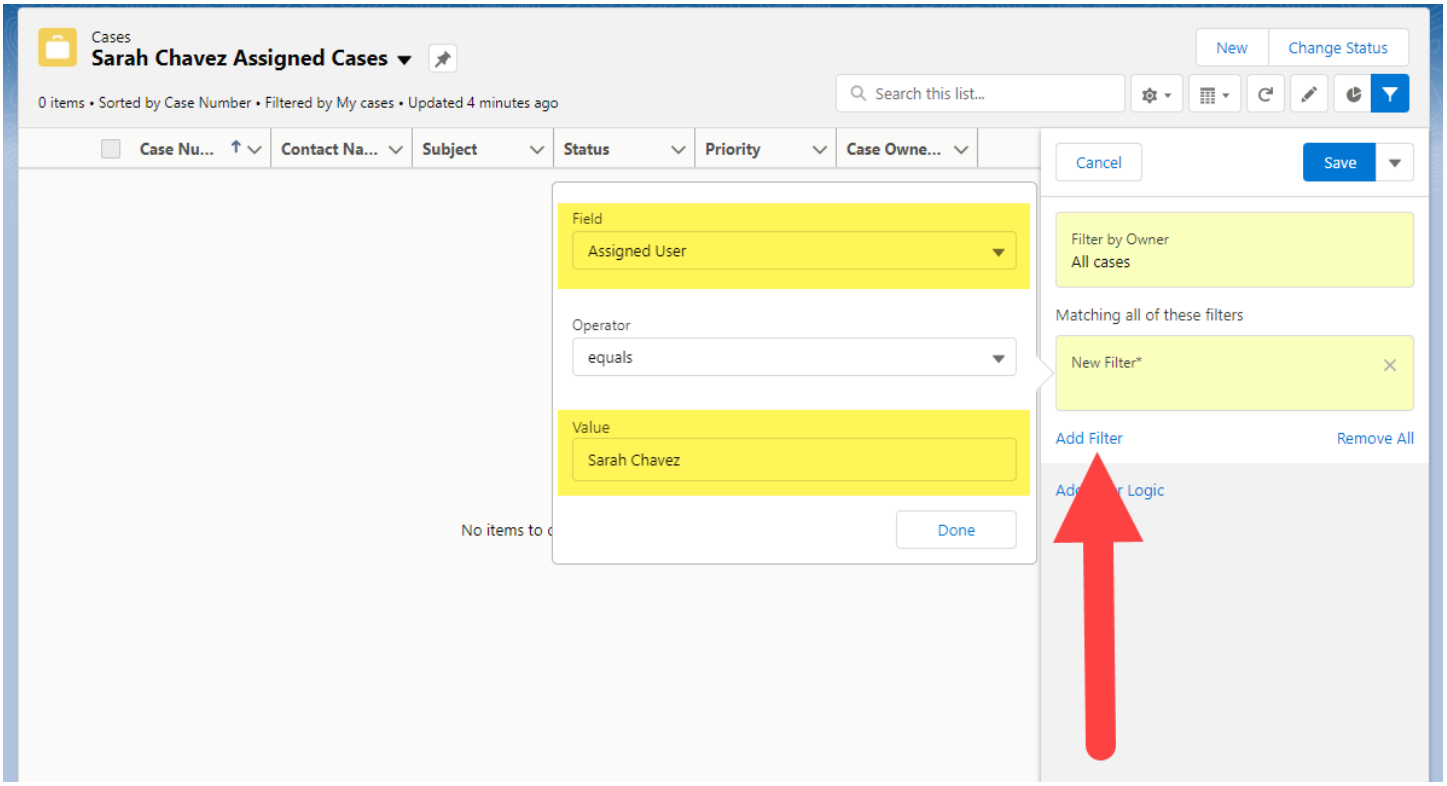


Next, we'll filter the cases down for those that we want to see. Click **Filter by Owner** and select **All cases** then **Done**.

The My Cases option does not work in CRM. The CRM team is aware of this but there isn't a fix available.

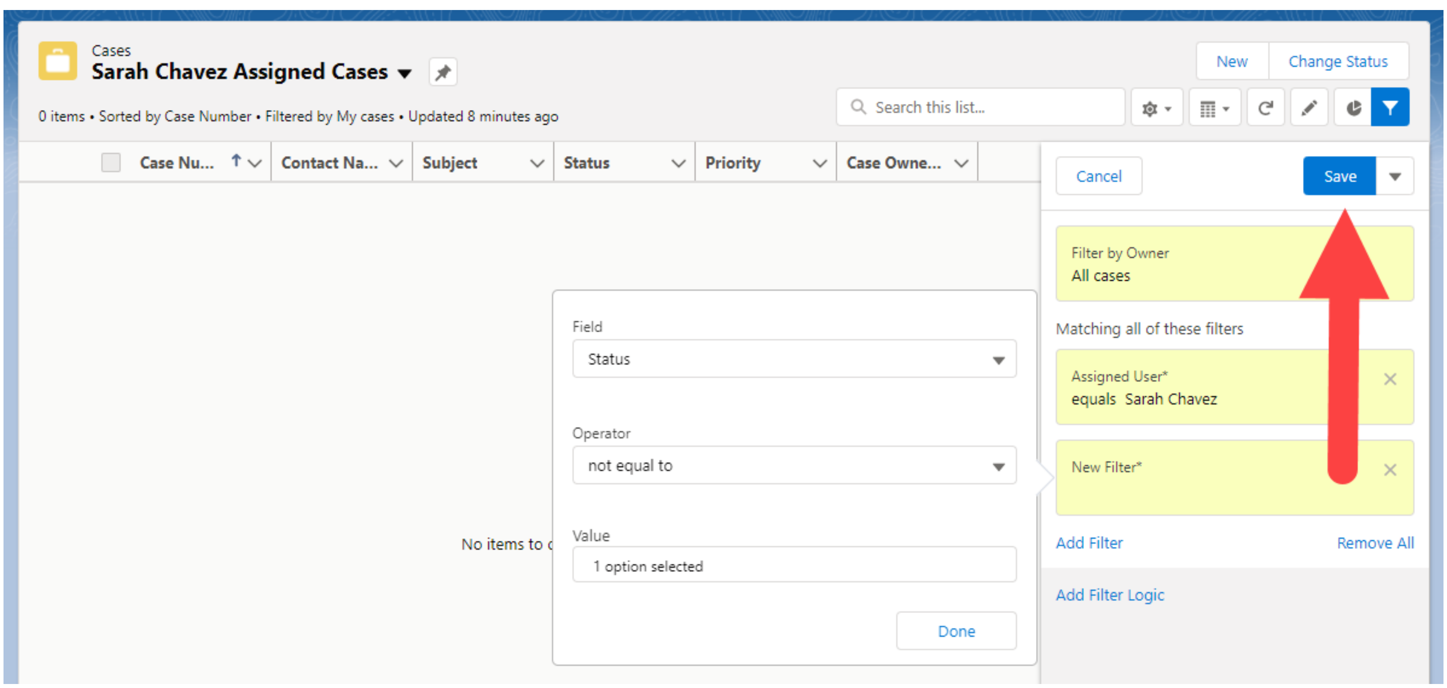


Click **Add Filter** to add another filter. This time we'll filter cases by who they are assigned to. Select **Assigned User** from the Field drop-down menu, **equals** from the Operator menu, and enter **your first and last name** in the Value field. Click **Done** to apply the filter.

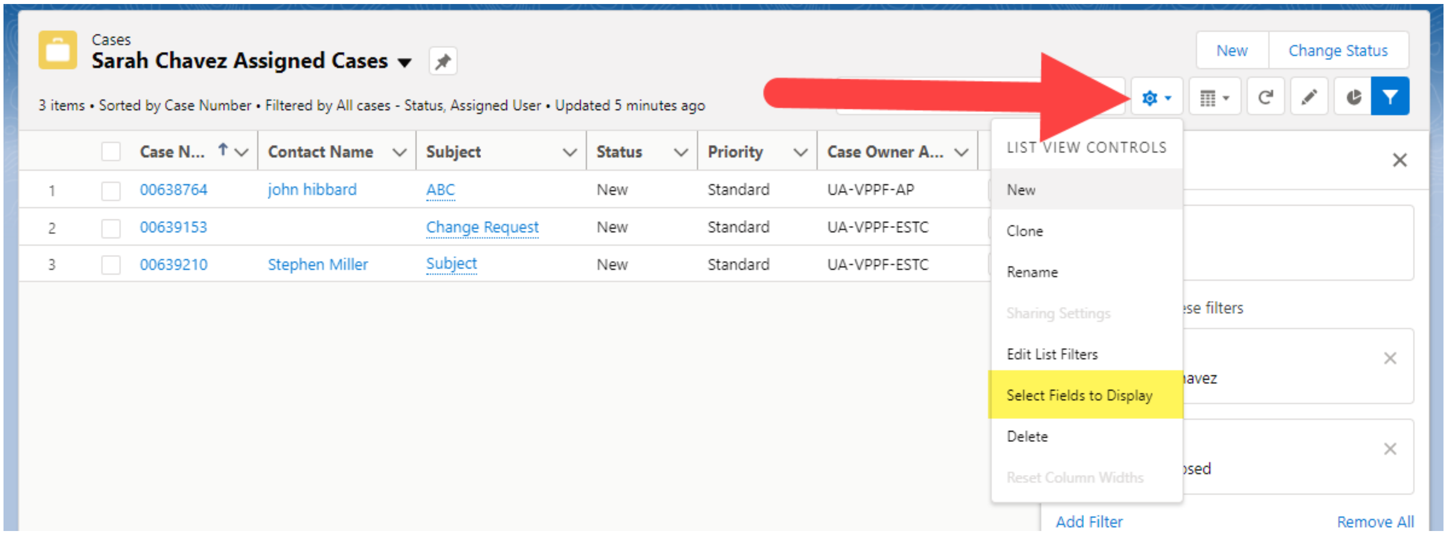


One more filter to go. Once again, click **Add Filter**, but this time select **Status** from the Field drop-down menu, **not equal to** from the Operator menu, and select **Closed** from the Value menu. Click **Done**. This updates the List View to only return cases that still require action of some type.

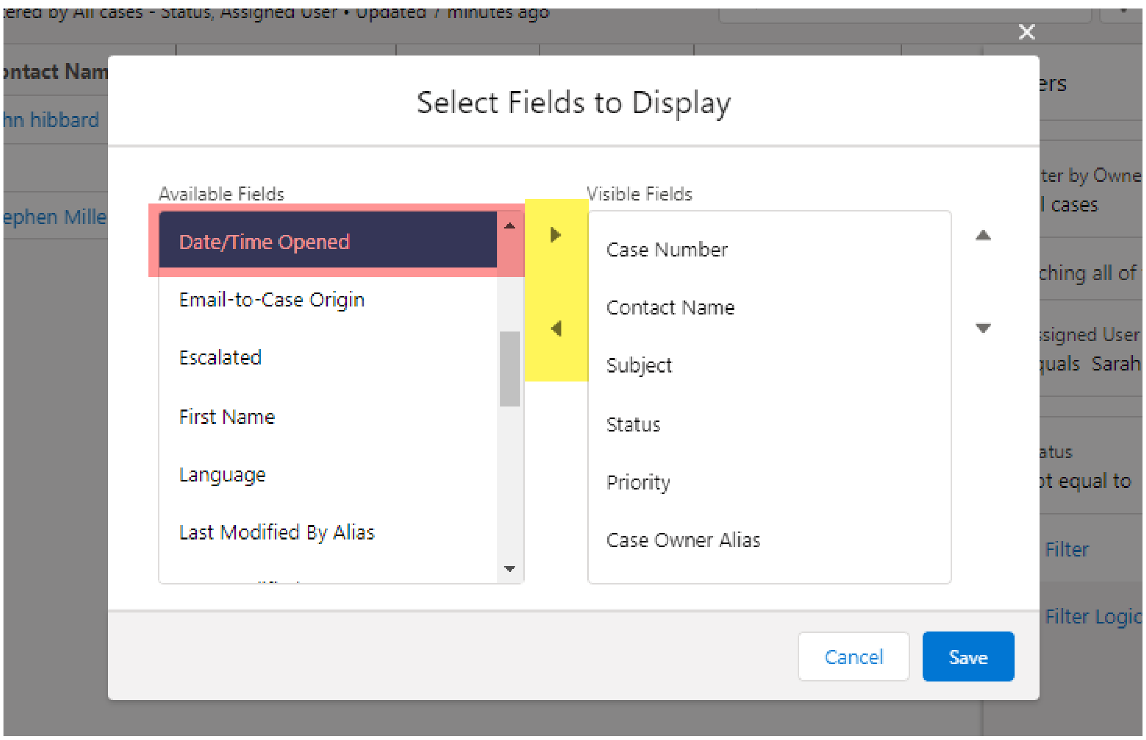
Click **Save** in the upper right-hand corner to save your filters.



The List View updates and returns the cases that meet your parameters. If desired, update the columns that are displayed by once again clicking the **gear icon**. This time, select **Select Fields to Display**.



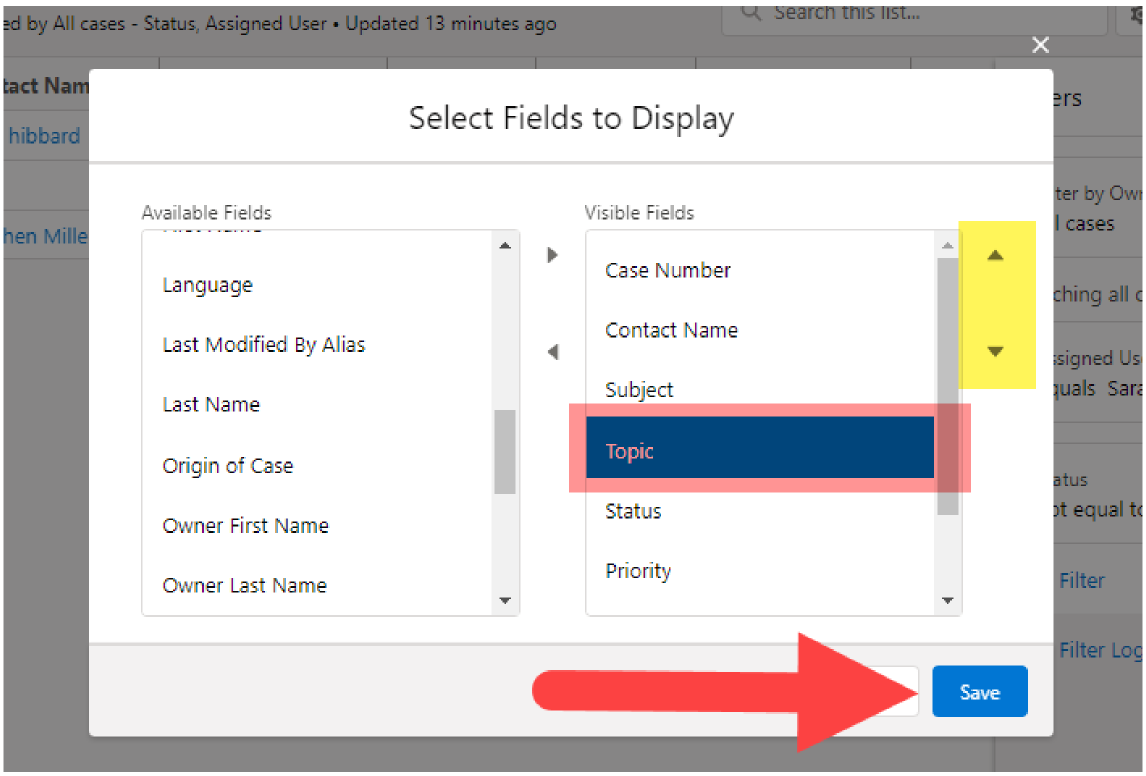
Columns can be moved back and forth using the **left and right arrows**. Items in the right-hand column will be visible in the List View. In the example below, we're moving the Date/Time Opened column to the List View by clicking the right arrow.



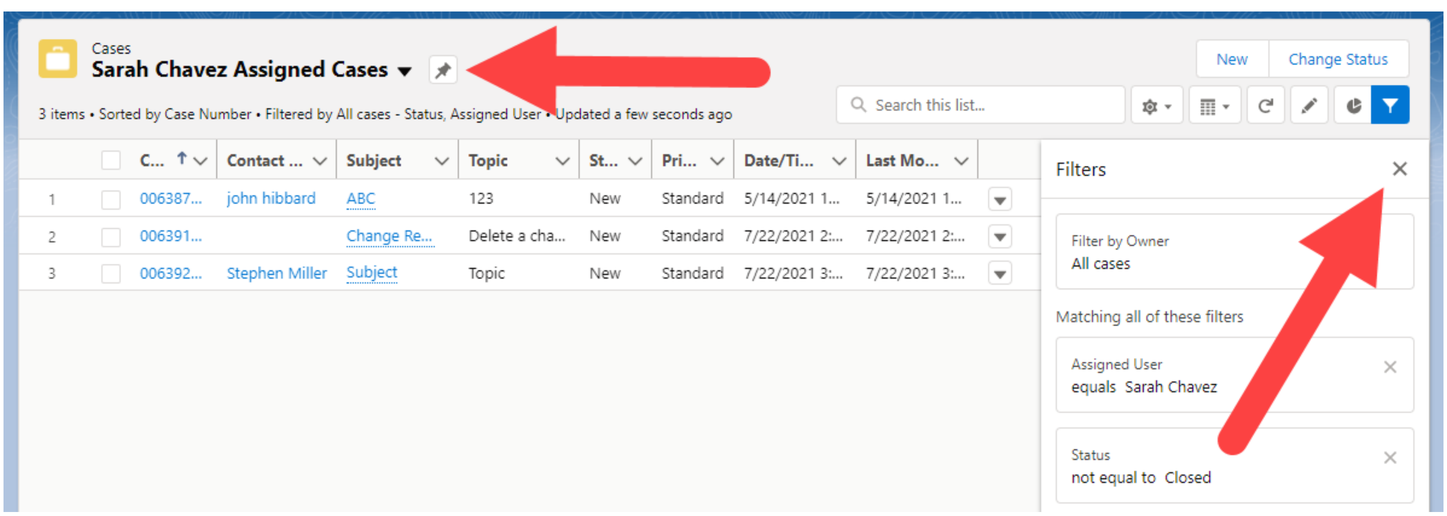
I recommend you add and remove the following columns to your List View:

Add from left column	Remove from right column
• Date/Time Opened	• Case Owner Alias
• Last Modified Date	
• Topic	

Update the order of columns by selecting a column in the right-hand side and using the **up and down arrows**. Below we moved the Topic column so that it would be next to the Subject column. Click **Save** to save your changes.



Finally, click the "**x**" in the Filters pane, then the **push pin** next to the List View name to set this as your default view.



Congrats! You've set up your assigned cases List View so you'll always see what requires your attention in CRM.