

Lightning List View Guide

This guide provides you a summary of the List Views available in your improveit 360 system. Prior to your company's "Go-Live" with improveit 360, your team should review this document and work with our Onboarding Team to determine the key existing List Views you'll use early on, as well as if additional List Views are needed for your business. Our List View goals are to show you how beneficial they are to day-to-day operations, as well as how easy they are to build on your own as needed!

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Addresses	All	NONE	Address Name, Account, Type, Street Address, City, State, Zip

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Accounts	All	NONE	Account Name, Primary Contact, Type, Phone, Not Qualified
Accounts	Vendor/Lender	Type equals Lender or Vendor	Account Name, Account Site, Billing State, Phone, Type, Owner
Accounts	Companies	Type equals Company	Account Name, Account Site, Billing State, Phone, Type, Owner
Accounts	Accounts Created Last 7 Days	Created Date equals the Last 7 Days	Account Name, Account Site, Billing State, Phone, Type, Owner
Accounts	Accounts Created Last 90 Days	Created Date equals the Last 90 Days	Account Name, Account Site, Billing State, Phone, Type, Owner
Accounts	Today's	Created Date equals Today	Account Name, Account Site, Billing State, Phone, Type, Owner
Accounts	Yesterday's	Created Date equals Yesterday	Account Name, Account Site, Billing State, Phone, Type, Owner

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Commissions	All	NONE	Commission Name, Project, Sale, Staff, Amount, Ready to Pay
Commissions	Commissions Ready to Pay	Ready to Pay is greater than zero (0)	Commission Name, Project, Sale, Staff, Amount, Ready to Pay

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Contacts	All	NONE	Name, Account Name, Home Phone, Mobile, Phone, Email

Tab	List View Name	Filter Criteria	Visible Fields in the List View
eLeads	All	NONE	eLead Name, First Name, Last Name, Interested In, Email, Phone, Source, Lead Source Name
eLeads	Yesterday's	Created Date equals Yesterday	eLead Name, First Name, Last Name, Interested In, Email, Phone, Source, Lead Source Name
eLeads	This Week's	Created Date equals This Week	eLead Name, First Name, Last Name, Interested In, Email, Phone, Source, Lead Source Name
eLeads	Unconverted	Account equals Blank (null)	eLead Name, First Name, Last Name, Interested In, Email, Phone, Source, Lead Source Name
eLeads	Today's	Created Date equals Today	eLead Name, First Name, Last Name, Interested In, Email, Phone, Source, Lead Source Name

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Inbound Text	All	NONE	Inbound Text Name, Account, Contact, Outbound Text, Body, Created Date

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Lead Sources	All	NONE	Lead Source Name, Source, Source Type, Start Date, End Date
Lead Sources	Active	End Date equals Blank (null)	Lead Source Name, Source, Source Type, Start Date, End Date
Lead Sources	Inactive	End Date not equal to Blank (null)	Lead Source Name, Source, Source Type, Start Date, End Date

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Loans	All	NONE	Loan Name, Borrower, Lender, Sale, Loan Option, Type, Status, Submitted
Loans	Applied Loans	Submitted Date less than Today AND Status equals Evaluation	Loan Name, Borrower, Lender, Sale, Loan Option, Type, Status, Submitted
Loans	Approved Loans	Expiration Date greater than Today AND Status equals Approved AND Sale equals Blank (null)	Loan Name, Borrower, Quote, Expiration Date, Type, Approved Loan Amount

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Outbound Text	All	NONE	Outbound Text Name, Account, Contact, Body, Status, Created Date

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Payments	All	NONE	Payment Name, Sale, Project, Received On, Type, Type Detail, Amount
Payments	Received this Week	Received On Date equals This Week	Payment Name, Sale, Project, Received On, Type, Type Detail, Amount
Payments	Received Today	Received On Date equals Today	Payment Name, Sale, Project, Received On, Type, Type Detail, Amount

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Products	All	NONE	Product Category, Product Name, Description, Active
Products	Active	Active equals True	Product Category, Product Name, Description, Active
Products	Inactive	Active equals False	Product Category, Product Name, Description, Active

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Projects	All	NONE	Project Name, Sale, Status, Project Price, Balance Due, Total Payments Received, Total Project Costs
Projects	Active	Status equals Active	Project Name, Sale, Project Manager, Product Categories, Project Price, Balance Due
Projects	Canceled	Status equals Canceled	Project Name, Sale, Project Manager, Product Categories, Project Price, Balance Due
Projects	Completed	Status equals Completed	Project Name, Sale, Project Manager, Product Categories, Project Price, Balance Due
Projects	On Hold	Status equals On Hold	Project Name, Sale, Project Manager, Product Categories, Project Price, Balance Due

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Project Activities	All	NONE	Project, Project Activity Name, Assigned To, Start, End, Completed On
Project Activities	Today's Activities	Start equals Today	Project Activity Name, Project, Assigned To, Start, End, Completed On, Description
Project Activities	Tomorrow's Activities	Start equals Tomorrow	Project Activity Name, Project, Assigned To, Start, End, Completed On, Description
Project Activities	Yesterday's Activities	Start equals Yesterday	Project Activity Name, Project, Assigned To, Start, End, Completed On, Description

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Quotes	All	NONE	Quote Name, Sales Appointment, Status, Total
Quotes	Drafts	Status equals Draft	Quote Name, Sales Appointment, Status, Total
Quotes	Proposed	Status equals Proposed	Quote Name, Sales Appointment, Status, Total
Quotes	Accepted	Status equals Accepted	Quote Name, Sales Appointment, Status, Total
Quotes	Rejected	Status equals Rejected	Quote Name, Sales Appointment, Status, Total

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Sales Appointments	All	NONE	Sales Appt Name, Account, Appointment Date/Time, Sales Rep 1, Status, Status Detail
Sales Appointments	Past without Result	Status equals Pending AND Appointment Date/Time less than Today	Sales Appt Name, Account, Appointment Date/Time, Sales Rep 1, Status, Status Detail
Sales Appointments	Today's	Appointment Date/Time equals Today	Sales Appt Name, Account, Appointment Date/Time, Sales Rep 1, Status, Status Detail
Sales Appointments	Tomorrow's	Appointment Date/Time equals Tomorrow	Sales Appt Name, Account, Appointment Date/Time, Sales Rep 1, Status, Status Detail
Sales Appointments	Yesterday's	Appointment Date/Time equals Yesterday	Sales Appt Name, Account, Appointment Date/Time, Sales Rep 1, Status, Status Detail
Sales Appointments	Future Unconfirmed	Appointment Date/Time greater than Today AND Confirmed On date equals Blank/Null AND Status equals Pending	Sales Appt Name, Account, Appointment Date/Time, Phone, Sales Rep 1, Status, Status Detail

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Sales Opportunities	All	NONE	Sales Opp Name, Account, Interest, Status, Result, Result Detail, Taken By, Taken On
Sales Opportunities	Not Sold	Result equals Not Sold	Sales Opp Name, Account, Taken On, Interest, Source, Source Type

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Sales	All	NONE	Sale Name, Account, Sales Rep 1, Status, Sold On, Total, Balance Due
Sales	Approved	Status equals Approved	Sale Name, Account, Sales Rep 1, Status, Sold On, Total, Balance Due
Sales	Net	Status equals Net	Sale Name, Account, Sales Rep 1, Status, Sold On, Total, Balance Due
Sales	Canceled	Status equals Canceled	Sale Name, Account, Sales Rep 1, Status, Sold On, Total, Balance Due
Sales	Completed	Status equals Completed	Sale Name, Account, Sales Rep 1, Status, Sold On, Total, Balance Due
Sales	In Review	Status equals In Review	Sale Name, Account, Sales Rep 1, Status, Sold On, Total, Balance Due
Sales	Balance Due	Balance Due greater than zero (0)	Sale Name, Account, Sales Rep 1, Status, Sold On, Total, Balance Due

Tab	List View Name	Filter Criteria	Visible Fields in the List View
Staff	All	NONE	Staff Name, Email, Home Phone, Mobile Phone, Start, End, User
Staff	Active	End Date equals Blank (null)	Staff Name, Email, Home Phone, Mobile Phone, Start, End, User, Project Capabilities, Sales Capabilities
Staff	Inactive	End Date not equal to Blank (null)	Staff Name, Email, Home Phone, Mobile Phone, Start, End, User