


Step 1: In this lecture we will learn about how you can display your records in various formats. So for that you will be able to see an icon next to the gear icon present on the right hand side of the screen.

Accounts ▾ Contacts ▾ Campaigns ▾ Dashboards ▾ Reports ▾ Chatter Groups ▾ Calendar ▾ More ▾

New Import Printable View

Search this list...


⚙️  ↺️ ✎️ 📄

▼	Type ▾	Annual Revenue ▾	Active ▾	Website ↑
	Customer - Direct		Yes	www.universityofarizona.edu
	Customer - Direct		Yes	http://www.uos.com
	Customer - Direct		Yes	http://www.uos.com
	Customer - Direct	\$5,600,000,000	Yes	http://www.uos.com
	Customer - Channel	\$950,000,000	Yes	www.pyramid.com
	Customer - Direct	\$500,000,000	Yes	www.grandhotels.com
	Customer - Channel	\$30,000,000	Yes	www.genepoint.com
	Customer - Channel	\$950,000,000	Yes	www.expressl&t.net
	Customer - Direct	\$139,000,000	Yes	http://edgecomm.com
	Customer - Channel	\$50,000,000	Yes	dickenson-consulting.com

Step 2: As you click on the icon you will see a pop up showing three options as table, kanban, and split view. Right now the option selected is kanban and all the data present in the custom acc list is shown in table format.

Active • Updated a few seconds ago

Search this list...

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Display as

☒ Table Display as Table

☐ Kanban

☐ Split View

▼	Phone ▾	Type ▾	Annual Revenue ▾	Active ▾	Website
	(520) 773-9050	Customer - Direct		Yes	www.universityofarizona.edu
	+44 191 4956203	Customer - Direct		Yes	http://www.uos.com
	(650) 450-8810	Customer - Direct		Yes	http://www.uos.com
	(212) 842-5500	Customer - Direct	\$5,600,000,000	Yes	http://www.uos.com
	(014) 427-4427	Customer - Channel	\$950,000,000	Yes	www.pyramid.com
	(312) 596-1000	Customer - Direct	\$500,000,000	Yes	www.grandhotels.com
	(650) 867-3450	Customer - Channel	\$30,000,000	Yes	www.genepoint.com
	(503) 421-7800	Customer - Channel	\$950,000,000	Yes	www.expressl&t.net
	(512) 757-6000	Customer - Direct	\$139,000,000	Yes	http://edgecomm.com
	(785) 241-6207	Customer - Channel	\$50,000,000	Yes	dickenson-consulting.com

Step 3: So now if We click on the kanban view you will see another pop up as kanban settings. Here you have to provide a few information like summarised by and group, here I am selecting summarised as number of locations and leaving group as account owner and clicking on save.

Kanban Settings

Summarize By
Number of Locations

* Group By
Account Owner

Cancel Save

Step 4: When you click save you will see that the data will appear in the kanban view which is basically used for opportunity tab so if we move to opportunity tab and apply the format you will see that it is based on the stage picklist and there records.

Opportunities
All Opportunities

32 items • Sorted by Opportunity Name • Updated a few seconds ago

Prospecting (2)	Qualification (1)	Needs Analysis (1)	Value Proposition (2)	Id. Decision Ma... (3)	Perception Anal... (1)
<p>\$100,000</p> <p>Pyramid Emergency ... \$100,000.00 Pyramid Construction Inc. 3/22/2021</p> <p>Test 1 5/4/2021</p>	<p>\$15,000</p> <p>Dickenson Mobile G... \$15,000.00 Dickenson plc 3/26/2021</p>	<p>\$675,000</p> <p>United Oil Plant Stan... \$675,000.00 United Oil & Gas Corp. 4/7/2021</p>	<p>\$330,000</p> <p>Express Logistics Por... \$80,000.00 Express Logistics and Trans... 2/5/2021</p> <p>Grand Hotels Guest ... \$250,000.00 Grand Hotels & Resorts Ltd 5/13/2021</p>	<p>\$110,000</p> <p>Edge Emergency Ge... \$35,000.00 Edge Communications 5/19/2021</p> <p>GenePoint Lab Gene... \$60,000.00 GenePoint 5/7/2021</p> <p>Grand Hotels Kitch... \$15,000.00 Grand Hotels & Resorts Ltd 2/2/2021</p>	<p>\$120,000</p> <p>Express Logistics SLA \$120,000.00 Express Logistics and Trans... 2/6/2021</p>

Step 5: After kanban view we have split view format so when we click on the split view we will see that on the left side all the records are available and on the right hand side details of the selected record will be displayed.

The screenshot shows the Salesforce interface in split view. The left pane, titled 'Custom Acc List..', contains a table of 10 accounts. The right pane displays the details for the selected account, 'University of Arizona'.

Account Name	Phone
University of Arizona Customer - Direct	(520) 773-9050
United Oil & Gas, UK Customer - Direct	+44 191 4956203
United Oil & Gas, Singapore Customer - Direct	(650) 450-8810
United Oil & Gas Corp. Customer - Direct	(212) 842-5500 \$5,600,000,000
Pyramid Construction Inc. Customer - Channel	(014) 427-4427 \$950,000,000
Grand Hotels & Resorts Ltd Customer - Direct	(312) 596-1000 \$500,000,000
GenePoint Customer - Channel	(650) 867-3450 \$30,000,000
Express Logistics and Transport	(503) 421-7800

The right pane shows details for 'University of Arizona' (Account ID: 001500000E0U9AAB). It includes fields for Type (Customer - Direct), Phone ((520) 773-9050), Website (www.universityofarizona.com), and Account Owner (astha gupta). Below these are sections for 'Related' (no duplicates), 'Account History (0)', and 'Contacts (1)' (Jane Grey, Title: Dean of Admini..., Email: jane_gray@uoa..., Phone: (520) 773-9050).

Step 6: There is one more option available as charts. When you click on charts the charts shown will be generated by default you can select your industries and analyse the charts.

The screenshot shows the Salesforce interface with a table of accounts and a donut chart. The table lists accounts with their Annual Revenue, Active status, and Website. The chart, titled 'Accounts By Industry', shows the distribution of accounts across different industries, with a total count of 10.

Annual Revenue	Active	Website
	Yes	www.universityofarizona.com
	Yes	http://www.uos.com
	Yes	http://www.uos.com
\$5,600,000,000	Yes	http://www.uos.com
\$950,000,000	Yes	www.pyramid.com
\$500,000,000	Yes	www.grandhotels.com
\$30,000,000	Yes	www.genepoint.com
\$950,000,000	Yes	www.expressl&t.net
\$139,000,000	Yes	http://edgecomm.com
\$50,000,000	Yes	dickenson-consulting.com

The chart, titled 'Accounts By Industry', is a donut chart showing the distribution of accounts across different industries. The chart is divided into 10 segments, with the largest segment being blue. The total count of accounts is 10.