

# Salesforce Service Desk user guide

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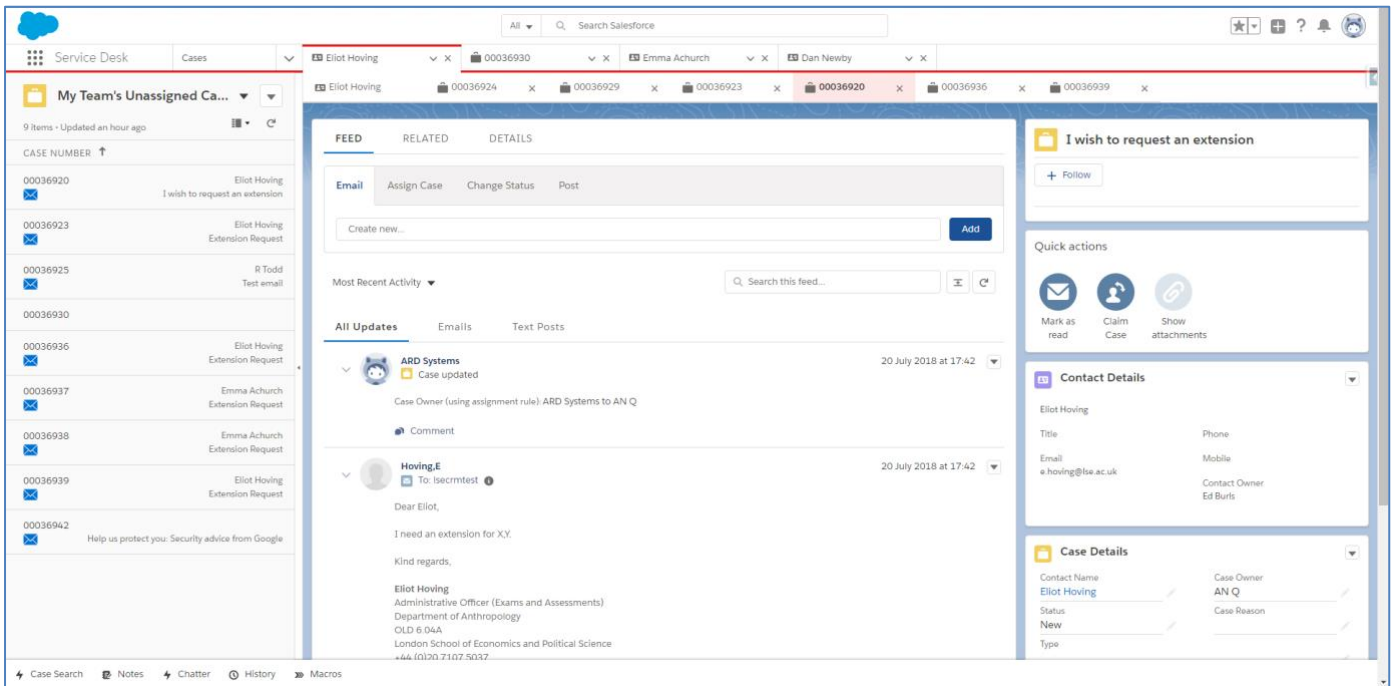
## What is Salesforce?

Salesforce is a cloud computing constituent relationship management (CRM) platform. If you've not used a CRM system before then you may wish to complete the Trailhead '[Salesforce User Basics](#)' module before using the service desk. (Trailhead is Salesforce's training website, which you can access with your Salesforce login.)

Salesforce was originally a platform primarily for sales-focussed organisations, and much of its branding, terminology and training materials are designed accordingly. However, many of the technologies that Salesforce offers also have the power to improve student and staff interactions, and management of student data, so LSE is pioneering its use in the UK Higher Education sector.

# What is the Service Desk?

The service desk (aka the helpdesk) is one of many apps that the School uses to perform functions in Salesforce. It is a tool to manage enquiries from 'constituents' (i.e. staff, students, external contacts, etc) and can help teams who receive queries or requests through shared mailboxes or forms to respond more quickly and effectively. It can also provide much better management information than is possible with traditional email tools such as Outlook.



1 The service desk

## Service Desk key concepts

### Cases

While managing a mailbox using Outlook might revolve around individual emails, the basic unit of work in the service desk is the **case**. A case is a collection of related emails, attachments, notes and additional information relating to an individual query, issue or support request.

Cases are typically created when someone sends a new email to (one of) your shared mailbox(es) or submits a web form connected to your service desk. They can also be created manually by members of your service desk team (e.g. for cases that originate by phone or in person) or from emails sent to your personal email address (if you have the Lightning for Outlook plugin).

Any responses you send are automatically 'threaded' to the case, as are further emails received about the same topic (even if they are not from the original contact). Salesforce does this by inserting a unique reference code at the end of your responses – any replies that contain that code will be matched to the correct case.

### Case queue

The **case queue** is your team's collection of new **cases** that have yet to be categorised and/or acted upon. New cases that are created from emails or web form submissions will, by default, appear in your team's case queue. In other words, the case queue is similar to a list of 'unread emails' in Outlook.

If your service desk is used to manage more than one mailbox then you may have a case queue for each mailbox.

### Case status

**Case status** is used to monitor the progress of a case, e.g. 'New', 'In progress', 'On hold' and 'Closed'. Cases that are 'Closed' are considered 'finished' and will usually be excluded from most of your **list views**.

## Case ownership

**Case ownership** is used to determine which individual team member is responsible for resolving the **case**. For most teams case ownership is used to manage the team’s workload effectively. However, if your team is very small or it has exceptionally clear demarcations of responsibility then your team may not use case ownership. New cases will usually be owned by your team’s **case queue** until they are assigned to a team member.

## Case reason

Your team will usually assign a **reason** to each **case**, which is a particular task or area of work for which the team is responsible. Examples might include ‘Reports’ or ‘Training’. Case reasons give a quick indication of what the case is likely to entail, and are particularly useful for producing management information **reports and dashboards**. Some teams also use case reasons to divide work between team members.

## List views

**List views** appear throughout Salesforce and are one of its most powerful tools. They are a filtered list of records that meet the specified criteria. Unlike the ‘folders’ concept used for emails in Outlook and for files on your computer, where each record can only appear in one folder, records in Salesforce can appear in any number of list views.

You will probably have list views set up in the service desk to show ‘My Team’s Unassigned Cases’ and ‘My Open Cases’, among others. It’s easy to make your own personal list views in the service desk.

## Quick text and email templates

**Quick text** is predefined text that you can use to send standard email responses to common queries. It can be an entire email, or just a paragraph or snippet. It is plain text so can’t include hyperlinks or styles such as bold or italic. **Email templates** are full HTML emails that can include different font sizes and styles, hyperlinks, images, tables, etc.

Both quick text and email templates can include merge fields that will dynamically pull data from anywhere in Salesforce, e.g. ‘Dear [First name]...’

## Macros

**Macros** are essentially shortcuts to complete common tasks in the service desk using only a few clicks instead of several. They can be used to automate repetitive processes such as responding to a common query by inserting quick text into an email, sending the email and then closing the case.

## Reports and dashboards

One of the key strengths of Salesforce is the ease with which it is possible to produce management information about the workload passing through your service desk. **Reports** look at individual statistics while **dashboards** group together data from multiple reports into a single view.



2 A service desk dashboard displaying data from several reports

## The table view

When you first log in to Salesforce you might see a page that looks broadly like the one below. This is called the 'table view' and shows key information about the cases in your selected list view, in a table. If you see something else when you log in then you might need to select the Service Desk app by clicking on the App Launcher (9 dots in a square at the top left of the page) and selecting the Service Desk.

As well as giving an at-a-glance overview of cases, you can use the table view to update multiple cases simultaneously, and to create your own list views. Details of how to complete these actions are in the [Advanced service desk activities](#) section.

CASE NUMBER	UNREAD EM...	SUBJECT	CONTACT NAME	STATUS	PRIORITY	DATE/TIME OPENED	CASE OWNER	LAST MODIFIED DATE
00036888		Test 4	Emma Achurch	Closed	Medium	31/05/2018 12:11	ehovi	31/07/2018 10:45
00036889		Test 18 06	Dan Newby	On Hold	Medium	18/06/2018 09:42	ckenn	26/07/2018 13:43
00036914	✕	Test 1 29 06 18	Dan Newby	New	Medium	29/06/2018 10:59	ehovi	02/08/2018 10:22
00036916		Test 3 29 06 18		Closed	Medium	29/06/2018 11:06	ehovi	26/07/2018 13:43
00036917				In Progress	Medium	18/07/2018 12:33	ehovi	26/07/2018 13:43
00036921	✕	Exam Questions and Scrutiny Meeting		In Progress	Medium	24/07/2018 15:03	ehovi	26/07/2018 13:43
00036922	✕	hello		New	Medium	24/07/2018 15:42	rtodd	02/08/2018 10:22
00036926	✕	Reading List	Eliot Hoving	New	Medium	24/07/2018 17:09	ckenn	31/07/2018 10:43

3 Example service desk table view

## The split view

In addition to the table view, the service desk offers the 'split view', which is the standard view within the service desk. As you'll see from the screenshot below there is a lot going on in the split view, but once you are familiar with what you can see and do here it's a very efficient tool. Information about the key features of the split view is below.

1: Top navigation bar (Service Desk, Cases)

2: List of cases (My Team's Unassigned Ca...)

3: Top toolbar (Eliot Hoving, Emma Achurch, Dan Newby)

4: Central feed area (Email, Assign Case, Change Status, Post)

5: Feed of updates (ARD Systems, Hoving.E)

6: Right-hand sidebar (I wish to request an extension, Quick actions, Contact Details, Case Details)

4 Example service desk split view, annotated

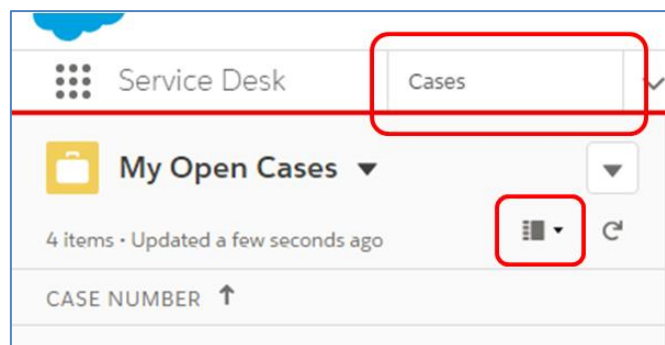
1. **The currently selected list view.** List views are filters that show particular records in the list below. The list view in this example is 'My Team's Unassigned Cases', i.e. new cases that have not yet been assigned to a team member. Depending on how your team uses the service desk you may have a list view called 'My Open Cases' (which contains the cases you are currently working on) or you may need to set up list views showing cases by case reason.
2. **The list of records in the selected list view.** In this example we are seeing 'My Team's Unassigned Cases', i.e. the cases owned by my team that have not been assigned to a specific team member.
3. **Contact and case tabs.** When you click on a case from the list it will open in a new tab along the top. Cases you've opened are grouped by the contact associated with the case (usually the person who sent the initial email or submitted the form). The top row of tabs shows the contact name. If you click on one of these tabs you will see the contact record for that contact and any cases you have opened that are associated with that record. If no contact is associated with the case the case number will appear on its own in the top row instead of the contact name.
4. **Case actions.** This area contains tools that you are likely to need to update, progress or close the case. You are likely to see the 'Email', 'Assign Case', 'Change Status' and 'Post' options.
5. **The case feed.** This is where the key information about the case is displayed, including emails received and sent, and any updates to the case such as case ownership or case status. You can filter this to include only emails or Chatter posts.
6. **Additional components.** The righthand column contains additional things you might find useful, such as quick actions to enable you to perform common tasks with a single click, extra information about the contact record for the person associated with the case, and files attached to the case.

## Standard service desk activities

### Switch between the split view and the table view

To switch between views, click on the 'Display as...' button and select the view you would like.

- In the split view the 'Display as...' button is above the case list on the left-hand side of the screen. Alternatively click where you see 'Cases' in the top left of the screen.



5 Switch view in split view

- In the table view the 'Display as...' button is towards the top right, between the 'gear' and 'refresh' icons. Alternatively click on a case to open it in the split view.

CASE NUMBER	CONTACT NAME	UNREAD...	SUBJECT	STATUS	PRIORITY	DATE/TIME OPENED	CASE OW...	LAST MODIFIED DATE	LAST EMAIL R
00036920	Eliot Hoving	✉	I wish to request an extension	New	Medium	20/07/2018 17:42	AN Q	26/07/2018 13:43	20/07/2018 1
00036925	Eliot Hoving	✉	Extension Request	In Progress	Medium	24/07/2018 15:57	AN Q	26/07/2018 13:43	24/07/2018 1
00036925	R Todd	✉	Test email	New	Medium	24/07/2018 16:21	AN Q	26/07/2018 13:43	24/07/2018 1

6 Switch view in table view

### View new cases that have come in to your team's service desk

New cases (i.e. those that have not yet been assigned to a team member) will usually appear in your team's unassigned cases list view. To select this list from either the split view or the table view, click on the 'Select List View' dropdown in the top left of the screen and select 'My Team's Unassigned Cases'. If your team manages multiple mailboxes then you might have access to more than one 'Unassigned Cases' list view.

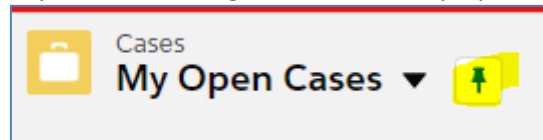


7 Select a list view

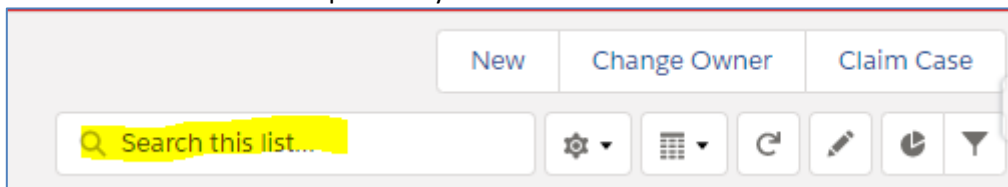
You should also have access to various other list views, including 'My Open Cases', which contains all the ongoing cases that have been assigned to you and not yet closed.

### List view tips

- Use the **pin** next to the list view name to set your default list view that will be visible when you open the service desk. This could be 'My Team's Unassigned Cases' or 'My Open Cases', for example.

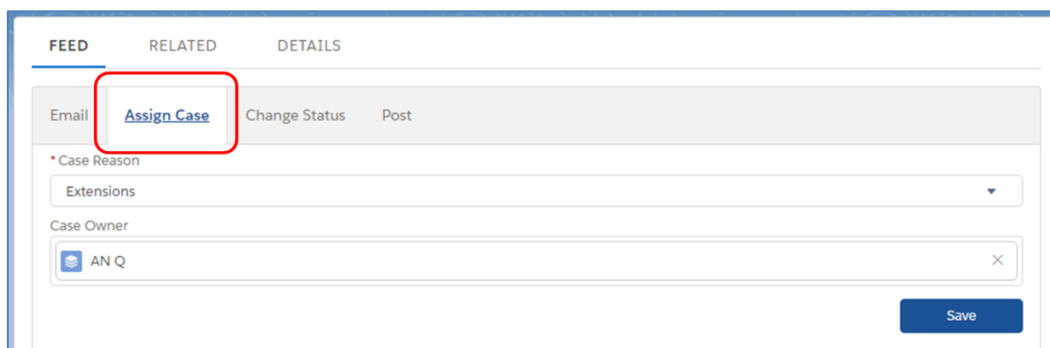


- Click on any column heading to **sort** the list view by that column. You can also resize the column widths to show more, or less, information.
- Use the list view **search** to search specifically within the current list view.



### Assign a case to a member of your team and choose a case reason

Click on a case and it will open in the split view. From here, click on the 'Assign Case' tab to update the case reason and case owner.



8 Assign a case

### Send an email

From the split view, click on the 'Email' tab to open an email editor which you can use to respond to emails received or to start a new chain. If you want to reply to a specific email rather than the latest one, scroll down the case feed to find the email you are looking for and use the 'Reply', 'Reply all' or 'Forward' button for that message.

9 Send an email

### Email tips

- If the person you want to email isn't already in the 'To' field, start typing their name or email address and Salesforce will find their details for you.
- If necessary, change the 'From' address by clicking on it and selecting another from the dropdown. You may see email addresses here that you do not have permission to send from.
- Use the buttons along the top of the editor to add hyperlinks, insert images or format the text.
- Press 'ctrl + .' (ctrl and full stop) to [insert quick text](#) or click on the email template button in the bottom left of the composer to insert an [email template](#).
- Email attachments can be added by drag-and-drop from a folder, or by clicking the paperclip icon.
- If you have set up an [email signature](#) it will automatically be inserted when you start a new email.
- Any emails you send will be added to the case feed, along with emails received, chatter posts and updates to the case record itself.

### Update the case status (including closing a case)

From the split view, click on the 'Change Status' tab to update the case status and/or case reason.

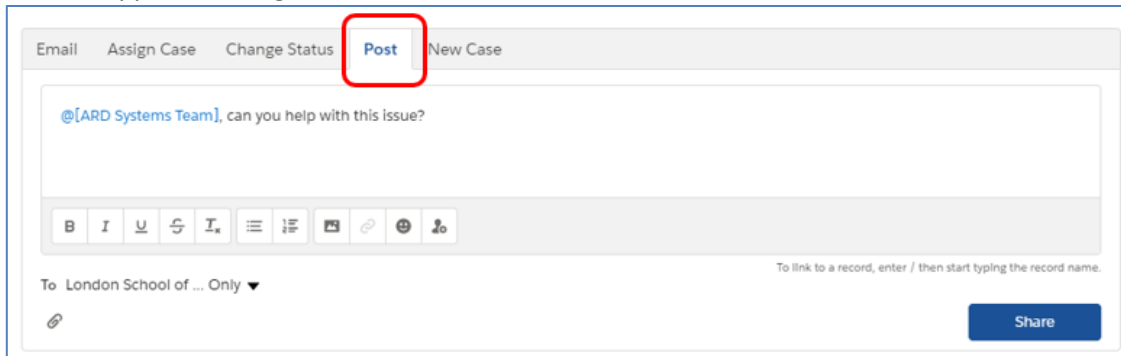
10 Update the status of a case

### Case status tips

- Use case statuses to manage your workload, e.g. to monitor 'in progress' and 'on hold' cases.
- If somebody sends an email relating to a closed case, it will reopen with the status of 'Closed – Check'.
- Use the 'Junk / Deleted' status to quickly exclude junk or duplicated cases from your list views. Cases with this status will be deleted periodically, but you should have at least a month to recover any cases you accidentally set to 'Junk / Deleted' status.

## Use Chatter to add a note or contact a colleague about a case

From the split view, click on the 'Post' tab to add notes or ask questions about the case. As this correspondence is always attached to the case, posting messages is a useful way to make notes for future reference or to ask quick questions of colleagues without losing their responses in amongst all your other email traffic. The 'Post' tab uses Chatter, a tool that appears throughout Salesforce.



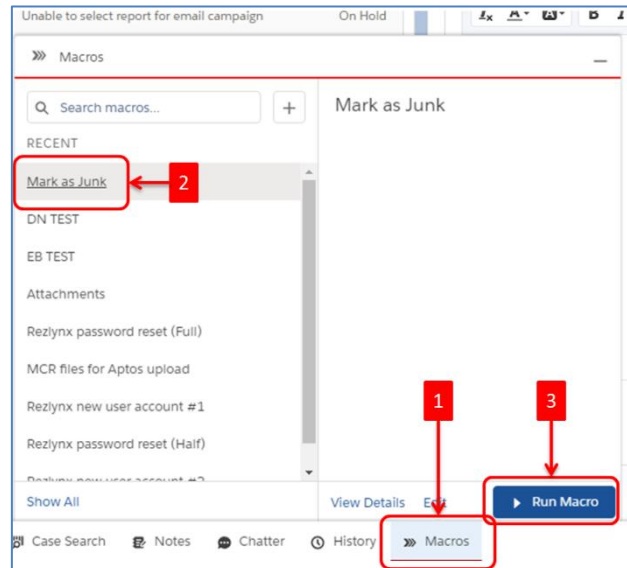
11 Share a Chatter post

## Chatter tips

- *@Mention* someone and they will receive an email and Salesforce notification with your message.
- If you're not sure who to contact, try *@Mentioning* a team instead.
- If you are *@Mentioned* in a Chatter post, you can respond by replying directly to the email notification you receive, or you can respond from within the service desk.
- All Chatter posts will appear in the case feed, along with emails sent and received, and updates to the case record itself.

## Run a macro

If your team has any macros set up you can run them by clicking on the 'Macros' button in the utility bar at the bottom of the screen, selecting the macro you want and then clicking 'Run Macro'.



12 Run a macro

## Update multiple cases at once

The table view allows in-line editing of some case fields, by double-clicking in the field you want to change, e.g. if you want to change the status of a particular case, double click on its status, select a different option and click 'save'. You can use this feature to make the same update to several cases at once. To do this:

1. Tick the checkboxes on the left-hand side of the list for the cases you want to update, or tick the checkbox at the top to select all.
2. Double-click on one of the fields you want to update and select the new value you want. Make sure to tick the 'update selected items' checkbox and then click 'Apply'.
3. Click 'Save'.



Cases  
My Team's Unassigned Cases ▾

5 items selected

	CASE NUMBER ↑ ▾	CONTACT NAME ▾	UNREAD... ▾	SUBJECT ▾	STATUS ▾	PRIORITY ▾	DATE/TIME
1	<input checked="" type="checkbox"/> 00036920	Eliot Hoving	<input checked="" type="checkbox"/>	I wish to request an extension	New	Medium	20/07/2018
2	<input type="checkbox"/> 00036923	Eliot Hoving	<input checked="" type="checkbox"/>	Extension Request	In Progress	Medium	24/07/2018
3	<input checked="" type="checkbox"/> 00036925	R Todd	<input checked="" type="checkbox"/>	Test email	New	Medium	24/07/2018
4	<input checked="" type="checkbox"/> 00036930						7/2018
5	<input checked="" type="checkbox"/> 00036936	Eliot Hoving	<input checked="" type="checkbox"/>	Extension Request			8/2018
6	<input type="checkbox"/> 00036937	Emma Achurch	<input checked="" type="checkbox"/>	Extension Request			8/2018
7	<input type="checkbox"/> 00036938	Emma Achurch	<input checked="" type="checkbox"/>	Extension Request			8/2018
8	<input checked="" type="checkbox"/> 00036939	Eliot Hoving	<input checked="" type="checkbox"/>	Extension Request	In Progress	Medium	03/08/2018
9	<input type="checkbox"/> 00036942		<input checked="" type="checkbox"/>	Help us protect you: Security advice from Google	New	Medium	06/08/2018

Update dialog box:

- Status: Closed
- Update 5 selected items
- Buttons: Cancel, Apply

### 13 Update multiple cases at once

## Create a new case manually

To create a case manually, click on the 'New Case' button on the utility bar at the bottom of the screen, complete the required information and click 'Next'. After a few moments your newly created case will be loaded into a new service desk tab.

New Case

**New Case**

Contact

\* Case Origin

\* Subject

Description

**Next**

Case Search | Notes | History | Macros | **New Case**

You will be the owner of the new case, and it will automatically be the right type of case for your team (it will have your team's case reasons, etc.).

## Advanced service desk activities

### Sharing and transferring cases between service desk teams

In the Service Desk it's not possible to send a case to another mailbox that uses the Service Desk by forwarding the email, as you might do in Outlook. This is because the case is already assigned to your team, so if you forward an email to another team that uses the Service Desk (or CC them in) then your email will simply be threaded on to the existing case, which will remain with your team.

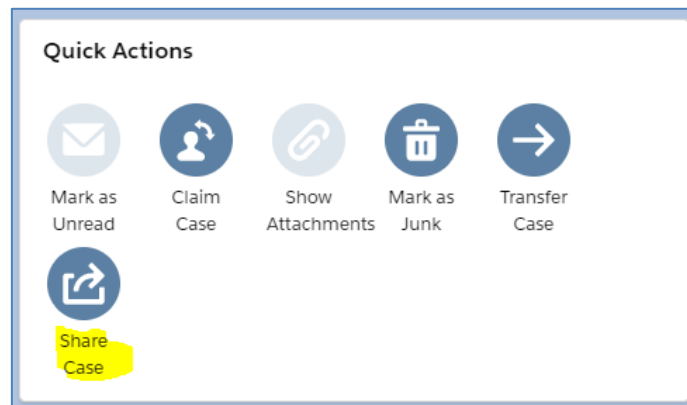
Instead, there are two options for sharing cases with other teams, depending on whether you wish to retain access to the case:

1. **Share a case with another team.** Use this when you want your team to retain access to the case, e.g. when you want to work collaboratively on the case with another team.
2. **Transfer a case to another team.** Use this when you don't need to retain access to the case, e.g. when somebody has contacted you by mistake, and their query should be resolved by another team.

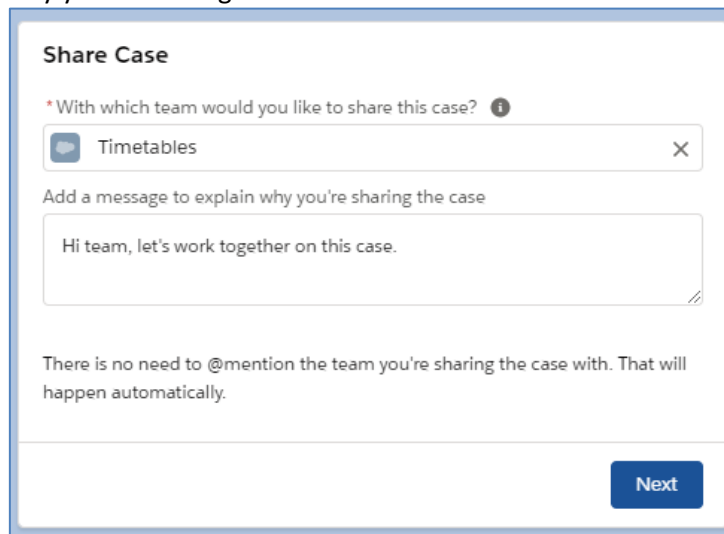
Sharing cases between teams is beneficial compared to sending emails as it reduces the chance that people are duplicating work on the same query, enables staff from different teams to see all related correspondence about a query in one place and provides clarity on who is responsible for managing the query.

### Share a case with another team

1. Open the case you wish to share and click on the Share Case button, which will open the Share Case panel below.



2. Start typing the name of the team you'd like to share the case with until it appears, then select it. Add a message to explain why you're sharing the case.

A screenshot of the 'Share Case' panel. At the top, it says 'Share Case'. Below that is a question: '\* With which team would you like to share this case?' followed by an information icon. A search input field contains the text 'Timetables' and has a close button (X) on the right. Below the search field is a text area with the placeholder text 'Add a message to explain why you're sharing the case'. The text area contains the message 'Hi team, let's work together on this case.' At the bottom of the panel, there is a blue button labeled 'Next'. Below the button, there is a note: 'There is no need to @mention the team you're sharing the case with. That will happen automatically.'

3. Once you've selected the right team and written a message, click 'Next'.

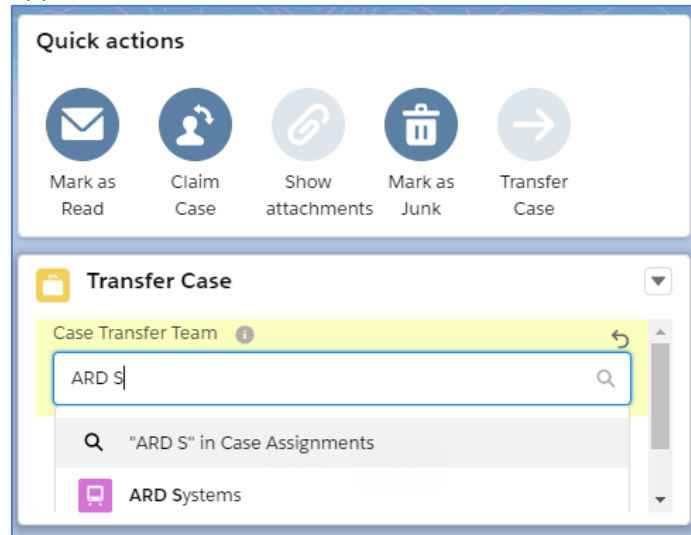
Once you click 'Next' the case will be shared with the selected team and they'll be notified of the message you added. Your message will also be added to the case feed.

### Transfer a case to another team

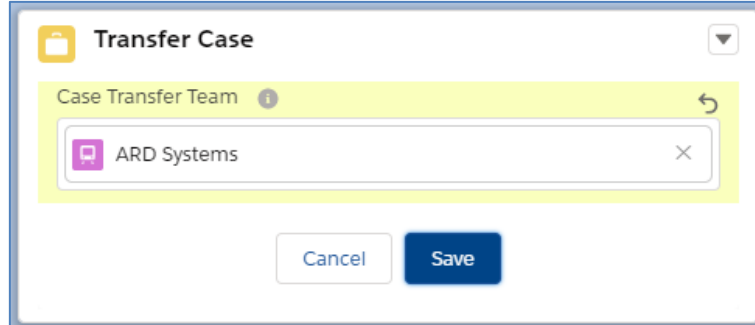
1. Open the case you wish to transfer and click on the Transfer Case button, which will open the Transfer Case panel below.



2. Click the 'Edit' button and start typing the name of the team to which you would like to transfer the case to. When the right team appears, select it.



3. Once you have selected the right team, click 'Save'



Once you click 'Save' the case will be updated so that it appears as a new case for the team you chose to transfer it to.

**Please note:** When you transfer a case, your team will no longer be the owner. You will retain access to the case for 1 hour after transferring it to another team, after which time the case will no longer be visible to you.

### Viewing cases that have been shared with or transferred to your team

Cases belonging to other teams that have been **shared** with your team will appear in the 'Cases Shared with my Team' list view.

The screenshot shows a list view titled 'Cases Shared with My Team'. It displays one case in a table with columns for Case Number, Contact Name, Subject, and Status.

	CASE NUMBER ↑	CONTACT NAME	SUBJECT	STATUS
1	00365069	Daniel NEWBY	DN Test 090919	New

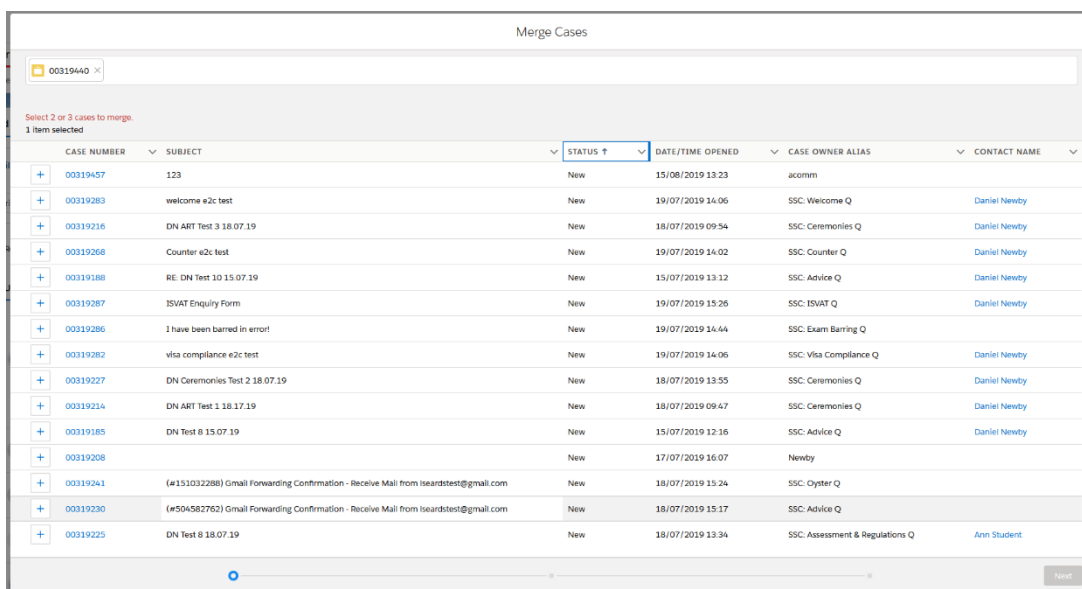
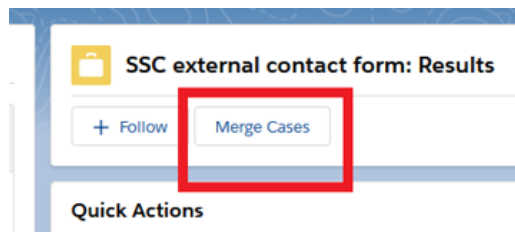
Cases that have been **transferred** to your team will appear as if they are new cases, in your team's 'Unassigned Cases' or 'New Cases' list view.

## Merging cases

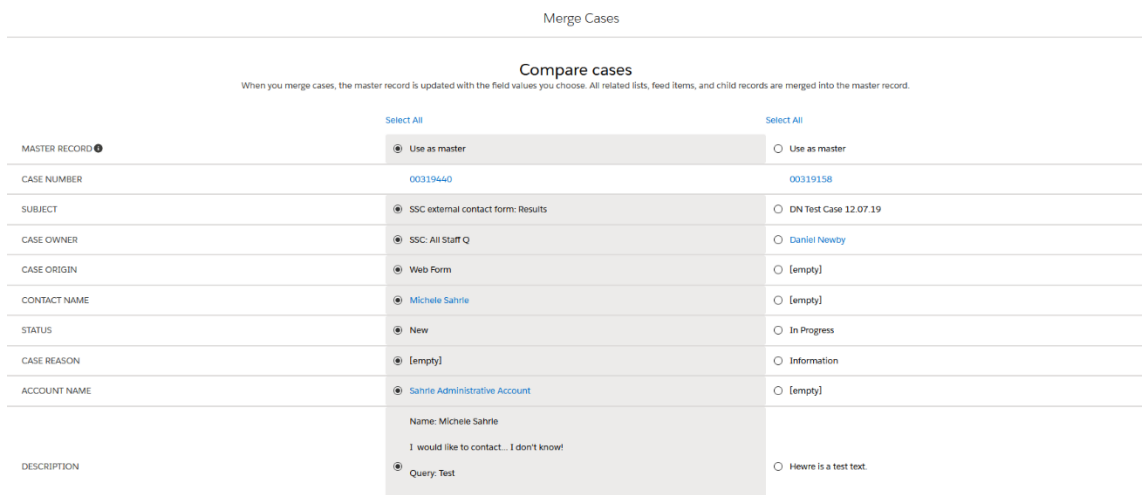
Use the Merge Cases button when you want to combine the emails, attachments and chatter posts from two or more cases into one consolidated case, e.g. when multiple cases have been created about the same enquiry or issue. Please note that merging cases is **permanent** and **cannot be undone**, so please double-check all the merge settings before confirming the merge.

Currently, you can merge cases from the split view (when you have a case open on the screen).

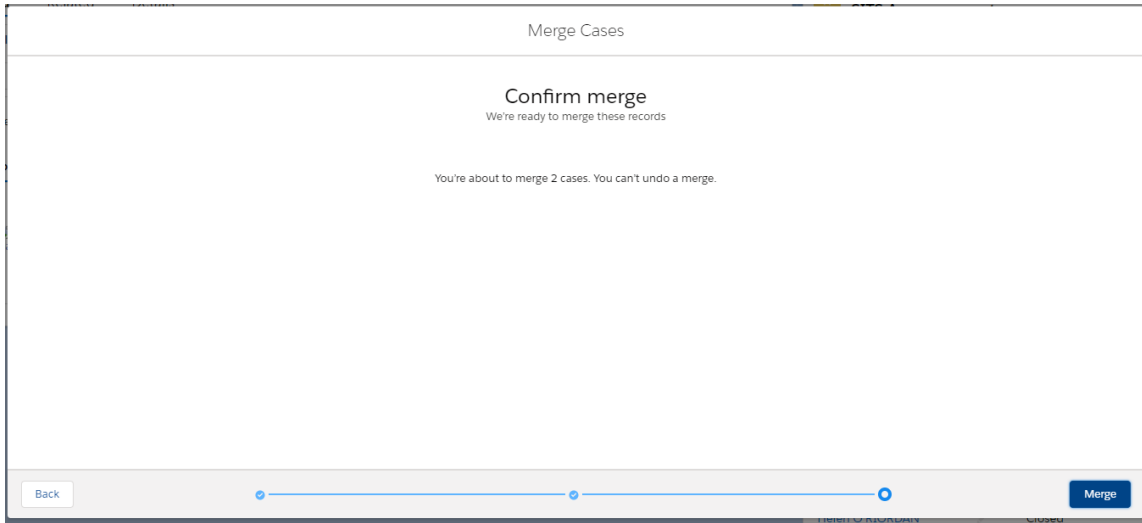
1. First, make a note of the case numbers of the cases you want to merge.
2. Open one of the cases you want to merge and click the 'Merge Cases' button towards the top right corner of the screen.
3. A window will open with a list of all the cases you have access to. Use the search bar at the top to find the cases you want to merge together, or click the plus button next to a case in the list to add it to the merge.



4. Select up to three cases to merge then click on the 'Next' button in the bottom right-hand of the screen.
5. The 'Compare Cases' screen will open. This screen allows you to select where the data for the new merged case should come from. Choose a 'Master Record', which is the case that will be kept after the merge is complete. (The other cases will be deleted.)



- Next, scroll down the list of fields and choose which values from each case you want to keep on the merged record. Once you're happy, click 'Next'.
- You will be asked if you wish to confirm the merge. Remember that merging cases is **permanent** and **cannot be undone**. Once you're ready to proceed, click 'Merge'. After several seconds your cases will be merged.



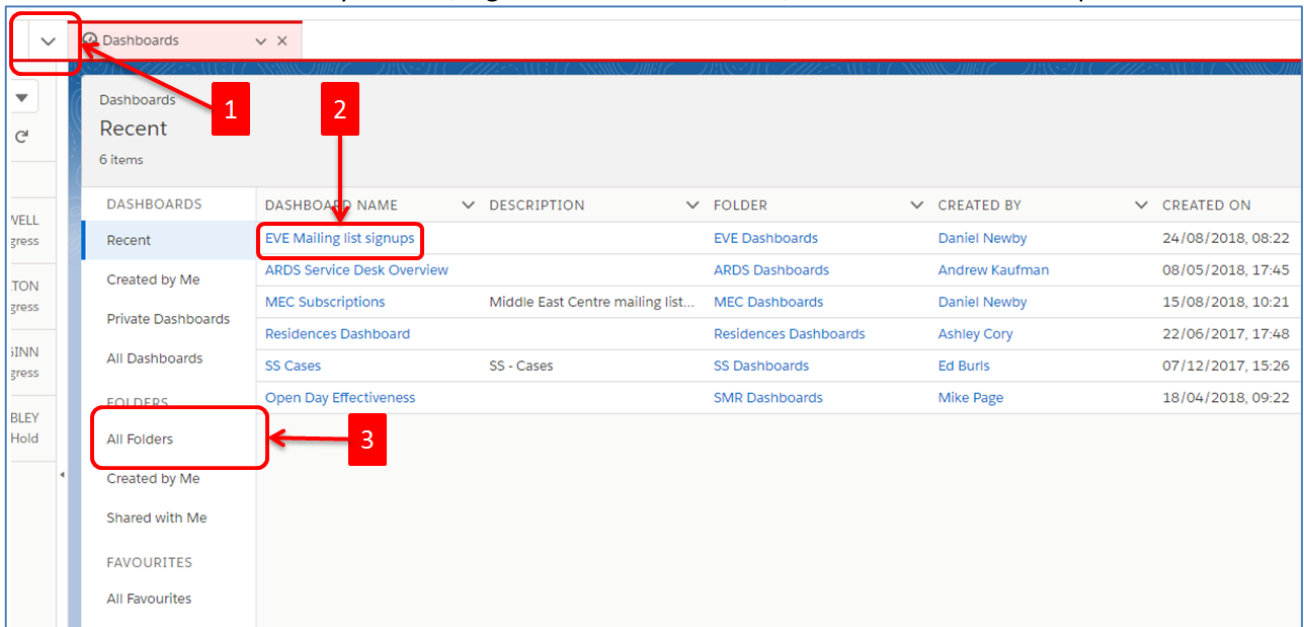
### Case merge tips

- You can only merge three cases at one time, but you can merge more cases if you split the merge process into steps. For example, if you have five cases you want to merge, you can first merge three of them in one merge action, and then merge this merged case with the two remaining cases.
- Merging cases is **permanent** and **cannot be undone**, so make sure you select the right cases to merge!

### View a management information dashboard

To view a dashboard from the table view or split view:

- Click on the dropdown next to 'Cases' in the top left of the screen and select 'Dashboards'. A list of your recently viewed dashboards will appear.
- If the dashboard you want is on your 'Recent' list, click on it to view it.
- If the dashboard you want is *not* on your 'recently viewed' list, click 'All Folders', select the folder that contains the dashboard you want, e.g. 'Standard Dashboards', and then click on it to open.



### Dashboard tips

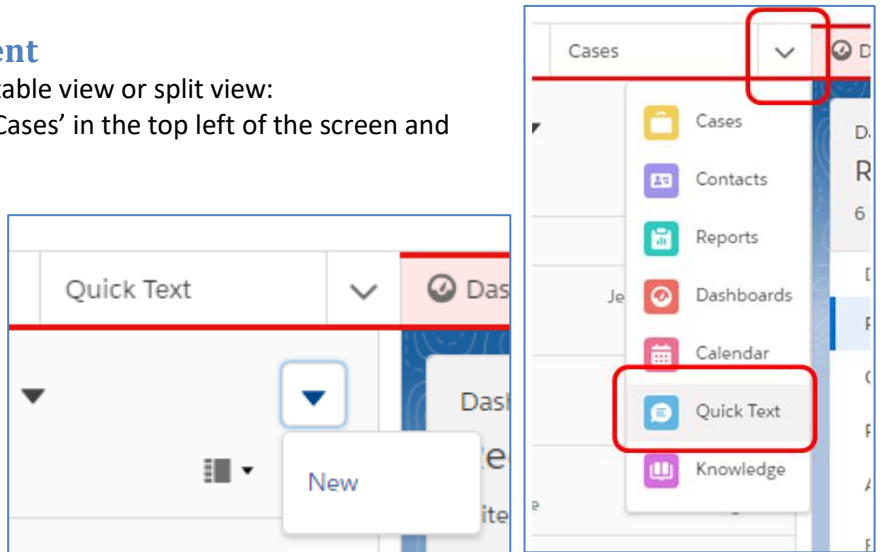
- The data in a dashboard does not refresh automatically, so you may need to click 'Refresh' to view the most up-to-date statistics. It may take several seconds for all components of the dashboard to refresh.

- To receive a regular email snapshot of your dashboard, click the 'Subscribe' button, select the frequency you would like and then click 'Save'.

## Create your own quick text content

To create new quick text content from the table view or split view:

- Click the dropdown arrow next to 'Cases' in the top left of the screen and select 'Quick Text'
- If you're in the table view click 'New' in the top right of the screen.
- If you're in the split view, click the dropdown arrow *below* 'Quick Text' in the top left of the screen, and then click 'New'.
- Once the 'New Quick Text' box opens:
  - Give your quick text a name that makes it easily identifiable
  - Enter your new quick text message
  - Select an appropriate folder in which to save it
  - Click 'Save'.



**New Quick Text**

**Fields**

\* Quick Text Name

\* Message

Insert Merge Field

Related To: Choose...

Field: Choose...

Insert

Enter a greeting, note, or an answer to a question...

**Channel**

Available	Selected
Portal	Email
Phone	
Internal	
Knowledge	
Event	
Task	
Live Agent	

\* Folder  Select Folder

System Information

Preview Cancel Save & New **Save**

14 Create quick text

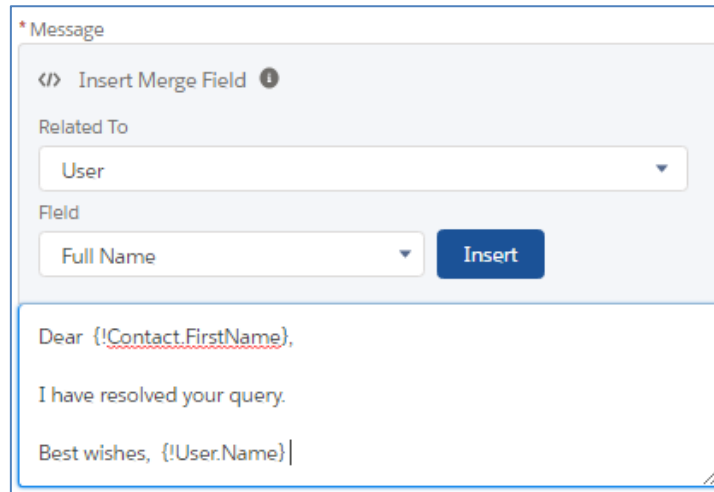
- Your new quick text is ready to use! To return to your cases, click the dropdown arrow next to 'Quick Text' in the top left of the screen, and select 'Cases'.

## Merge fields

You can include merge fields in quick text, so that you can set up standard messages that will pull in data relevant to the case (and any connected records such as contact, user, etc) each time it is used. For example, you include the

case contact's name in the quick text, e.g. 'Dear [Contact's First Name]', or the name of the user sending the email, e.g. 'Best wishes, [User's name]'. To insert a merge field into a quick text message:

1. On the 'New Quick Text' screen, choose the object (e.g. case, contact, user) from which you want to insert a field from the 'Related To' dropdown list.
2. Select the field you want to insert from the dropdown list (e.g. case number, name, email address).
3. Click in the message field, navigate to the part of the text where you want the merge field to go, then click 'Insert'. Some text beginning with '{!' and ending with '}' will be inserted, e.g. '{!Contact.FirstName}'.
4. Click 'Save'.
5. Now when you add your quick text to an email, the merge field will insert the relevant data, e.g. 'Dear Fred' instead of 'Dear {!Contact.FirstName}'.

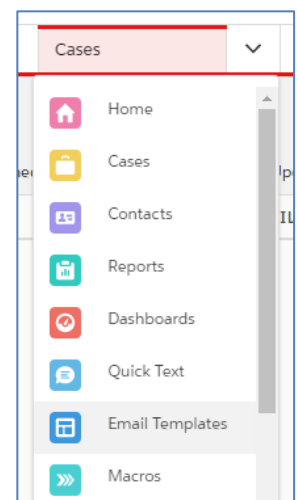


15 Quick text merge fields

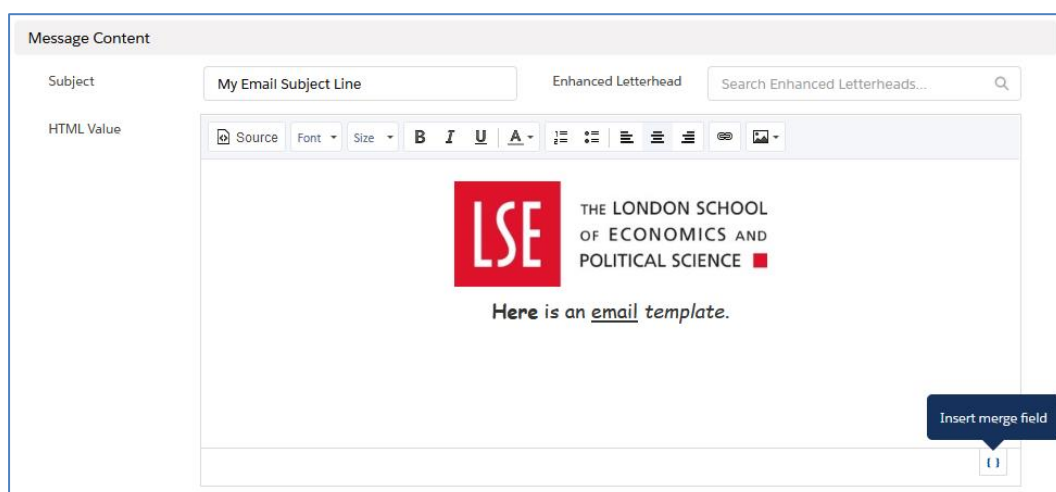
## Create your own email templates

To create a new email template from the table view or split view:

1. Click the dropdown arrow next to 'Cases' in the top left of the screen and select 'Email Templates' from the dropdown navigation menu.
2. Click 'New Email Template' in the top right corner.
3. Once the 'New Email Template' box opens:
  - a. Give your template a name that makes it easily identifiable.
  - b. Change 'Related Entity Type' to 'Case'. Doing this allows you to include merge fields from the case in the template.
  - c. Give your template a meaningful description if it's not clear from the name.
  - d. Select an appropriate folder in which to save the template. If you save it in 'Private Email Templates' then nobody else will be able to use it.



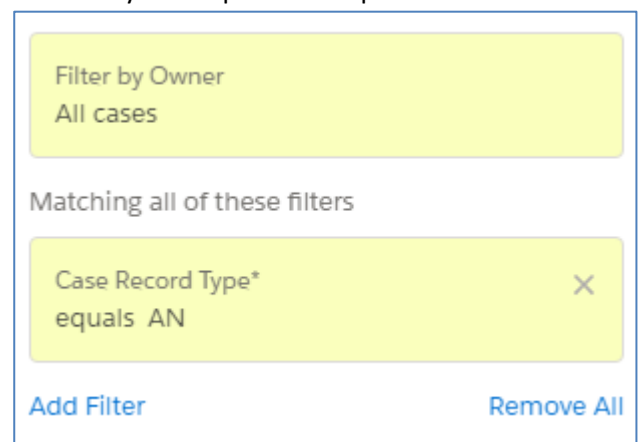
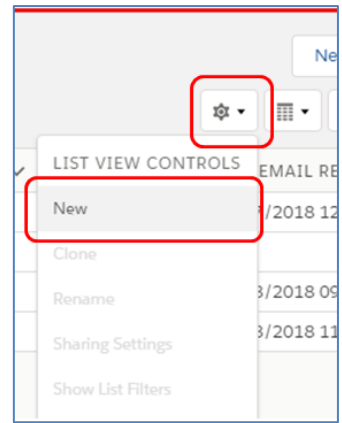
4. Add a subject and then add the content of your email template. Use the toolbar along the top to change the font, size and style of text. Include hyperlinks, lists or images if you want to, and click on the 'Source' button if you want to view or amend the template's HTML. Add merge fields, e.g. the case's case number or the recipient's name, using the merge fields button.



## Create your own list views

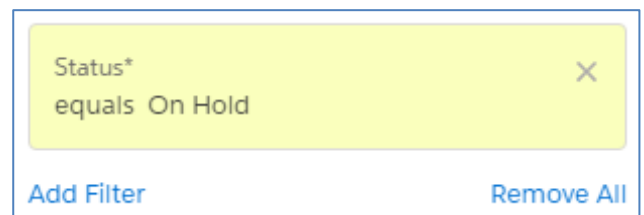
You may wish to use more than the default list views included with your service desk, for example to keep track of cases with a certain case reason or status, or even cases from particular people. To create your own list view:

1. Make sure you are in the table view.
2. Click the 'List View Controls' gear icon towards the top right of the screen and select 'New'.
3. A 'New List View' box will open. Give your list view a name that is easy to understand and click 'Save'.
4. Your newly created list view will open with the list view filters bar on the right-hand side. By default you will see that 'Filter by Owner' = 'My cases' which means that the list view will only show you cases that are assigned to you. If you want the list view to contain cases assigned to anybody in your team, click on 'Filter by Owner' and change the option to 'All cases'. You could also choose 'Queue owned cases' and then select a queue that you have access to if you want your list view to only show cases that are unassigned.
5. Once you are happy with the 'Filter by Owner' filter, it is good practice to add a 'Case Record Type' filter that will speed up the time it takes for the list view to load and enable you to update multiple cases at once. To do this:
  - a. Click 'Add Filter'
  - b. In the 'Field' dropdown list select 'Case Record Type'
  - c. Ensure the 'Operator' is set to 'Equals'
  - d. Click on the 'Value' dropdown and select your team's record type code. It should be clear from the codes which record type is yours, but if you're not sure ask a colleague or contact [ard.systems@lse.ac.uk](mailto:ard.systems@lse.ac.uk)
  - e. Click 'Done'.



Now that you have set up the owner and record type filters, you will need to add any additional filters you need so that the list view shows the cases you want it to.

6. Click 'Add Filter' and choose the fields and values you want the list view to include. Common fields you might want to use are 'Case Reason' and 'Status'. For example, if you wanted to create a list view that showed all your team's cases that have the Status of 'On Hold', you could set up the 'Owner' and 'Case Record Type' filters as above, and then:
  - a. Click 'Add Filter'
  - b. In the 'Field' dropdown list select 'Status'
  - c. Ensure the 'Operator' is set to 'Equals'
  - d. Click on the 'Value' dropdown and select 'On Hold'
  - e. Click 'Done'
7. Once you are happy with your filters, click 'Save' and the list view will refresh.
8. If you decide later on that you would like to change the filters for a list view you've created, click the 'List View Controls' gear icon and select 'Edit Filters'.



Once you have saved your list view filters your list view is finished and ready to use. However, if needed you can also amend the columns that appear in your list view.

9. Click the 'List View Controls' gear icon and select 'Select Fields to Display'
10. Using the left and right arrows, add any fields you want from the 'Available Fields' to the 'Visible Fields' list and remove any fields from the 'Visible Fields' list that you won't want to appear in your list view.
11. Reorder the 'Visible Fields' to your liking using the up and down arrows.
12. Once you're happy with your list view fields, click 'Save'.



Select Fields to Display

Available Fields

- Last Modified Date
- Last Name
- Owner First Name
- Owner Last Name
- Parent Case Number
- Rescheduling reason
- Residence - First Notification E...

Visible Fields

- Case Number
- Contact Name
- Subject
- Status
- Priority
- Owner Name

Cancel Save

16 Select list view fields to display

## Further information

The Salesforce website has instructions on how to perform a number of specific tasks that you might find useful:

- [Service desk keyboard shortcuts](#)
- [Update your Salesforce email settings](#)
- [Reports and dashboards Trailhead module](#)
- [Create your own macros Trailhead module](#)