



List View Export User Guide

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OVERVIEW

Introducing "Export List View" – a powerful tool for Salesforce that revolutionizes how you manage and export your list view data. With this app, exporting records from any list view to a CSV file is quick and seamless. Whether you're handling thousands of records or just a handful, Export List View ensures efficiency and ease of use. Simply select a list view, and the app automatically fetches and formats the records into a well-structured CSV file, ready for download. This streamlined solution eliminates the need for complex manual exports, saving time and effort.

This User Instruction Manual provides you with all the information you need to fully leverage the Export List View app, helping you simplify record exports and optimize your Salesforce experience.

List View Export

Export CSV from List Views

Export Standard and Custom Objects

Export any standard or custom object

No More Reports

No need to create new reports and copy complex filters to export records

Quick Record Number Indicator

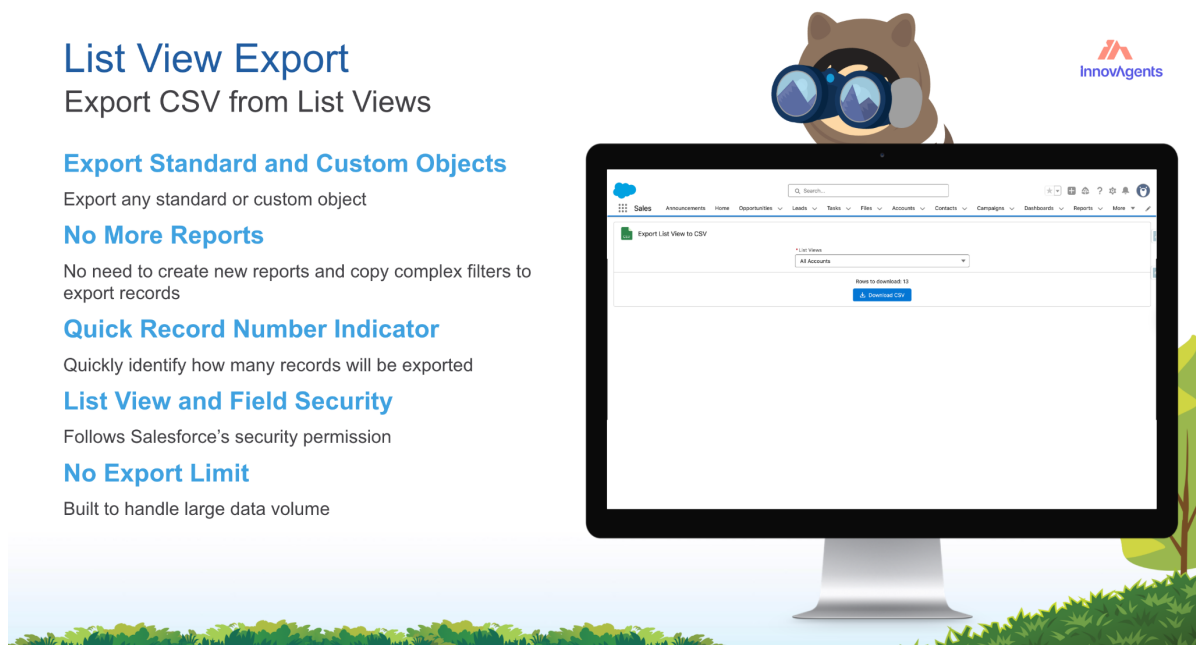
Quickly identify how many records will be exported

List View and Field Security

Follows Salesforce's security permission

No Export Limit

Built to handle large data volume



KEY FEATURES

1. List View Record Export

Effortlessly export all records from a selected list view to a CSV file with a single click.

2. Customizable List Views

Export data from any list view, including those with fine-tuned filters.

3. Record Count Indication

Get a quick overview of the total number of records in the list view, making it easy to track the data.

4. Export Unlimited Records

Export all records in a list view without restrictions, no matter the volume.

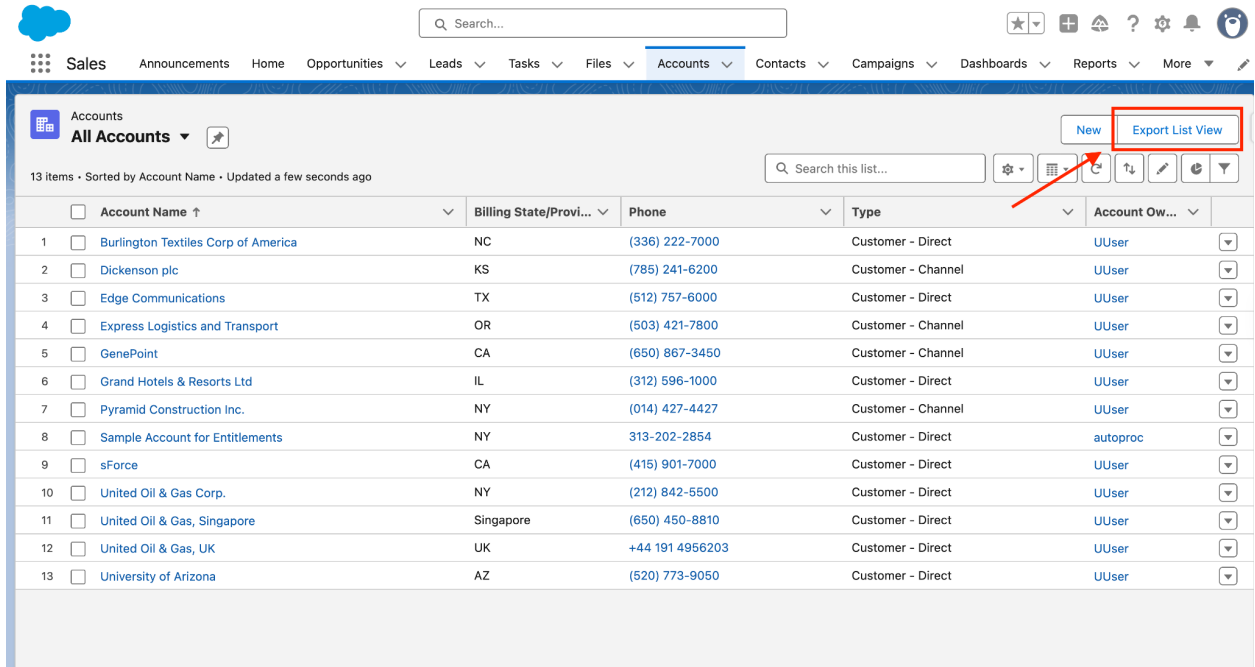
5. Effortless Configuration

Administrators can easily add functionality to an object and give user permission to export.

INSTALLATION

"Export List View" is a Salesforce Managed Package. You can install it following the [Salesforce guide on how to install a package](#).

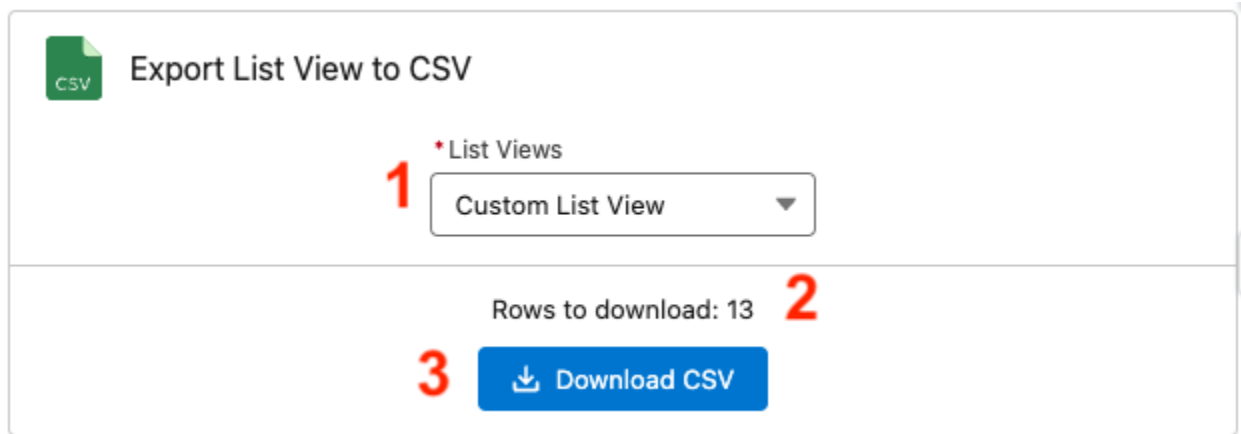
User Interface Overview



The screenshot shows the 'Accounts' section of the InnovAgents interface. At the top, there is a navigation bar with various tabs like Sales, Announcements, Home, Opportunities, Leads, Tasks, Files, Accounts (selected), Contacts, Campaigns, Dashboards, Reports, and More. Below the navigation bar, there is a search bar and a list of accounts. The 'Export List View' button is highlighted with a red box and an arrow.

Account Name	Billing State/Provi...	Phone	Type	Account Ow...
1 ☐ Burlington Textiles Corp of America	NC	(336) 222-7000	Customer - Direct	UUser
2 ☐ Dickenson plc	KS	(785) 241-6200	Customer - Channel	UUser
3 ☐ Edge Communications	TX	(512) 757-6000	Customer - Direct	UUser
4 ☐ Express Logistics and Transport	OR	(503) 421-7800	Customer - Channel	UUser
5 ☐ GenePoint	CA	(650) 867-3450	Customer - Channel	UUser
6 ☐ Grand Hotels & Resorts Ltd	IL	(312) 596-1000	Customer - Direct	UUser
7 ☐ Pyramid Construction Inc.	NY	(014) 427-4427	Customer - Channel	UUser
8 ☐ Sample Account for Entitlements	NY	313-202-2854	Customer - Direct	autoproc
9 ☐ sForce	CA	(415) 901-7000	Customer - Direct	UUser
10 ☐ United Oil & Gas Corp.	NY	(212) 842-5500	Customer - Direct	UUser
11 ☐ United Oil & Gas, Singapore	Singapore	(650) 450-8810	Customer - Direct	UUser
12 ☐ United Oil & Gas, UK	UK	+44 191 4956203	Customer - Direct	UUser
13 ☐ University of Arizona	AZ	(520) 773-9050	Customer - Direct	UUser

1. **Export List View button:** button to start the export process

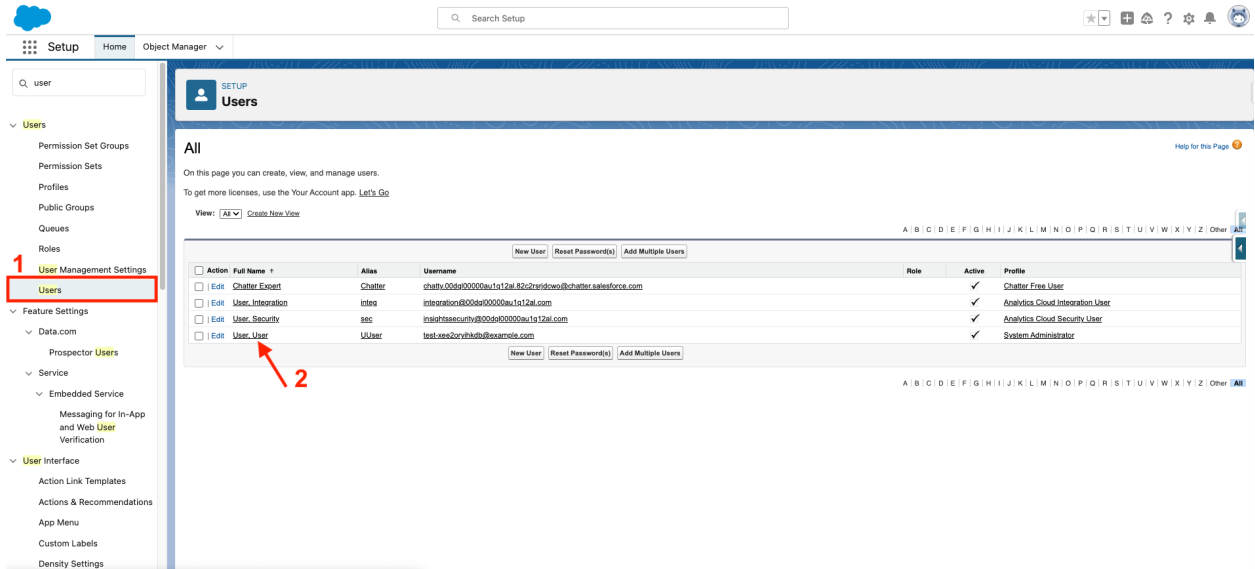


The screenshot shows the 'Export List View to CSV' dialog box. It has a title bar with a CSV icon and the text 'Export List View to CSV'. Below the title bar, there is a dropdown menu for 'List Views' with 'Custom List View' selected. Below the dropdown menu, it says 'Rows to download: 13'. At the bottom, there is a blue button labeled 'Download CSV'.

2. **List View Selector:** drop-down menu to select the desired list view.
3. **Record Count Indication:** number of records contained in the selected list view.
4. **Download CSV button:** download all records in a csv file.

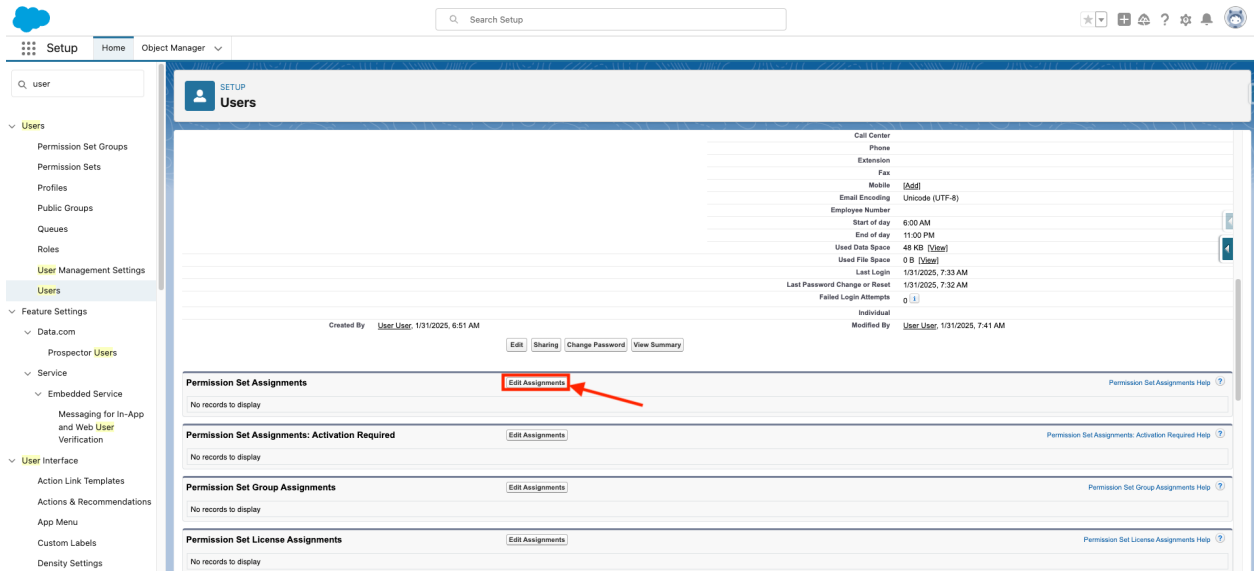
Initial Configuration

1. On Setup Home, give the desired user the “Export from List View - User” permission set (it is also needed for the user to have RunFlow permission)



The screenshot shows the 'Setup Users' page. In the left sidebar, under 'Users', the 'User Management Settings' link is highlighted with a red box and labeled '1'. The main content area shows a table of users. The 'User User' row is highlighted with a red box and labeled '2'.

Action	Full Name	Alias	Username	Role	Active	Profile
☐ Edit	Chatter Expert	Chatter	chatter.00a900000a1c12a1.82c2m2dew@chatter.salesforce.com		✓	Chatter Free User
☐ Edit	User Integration	intex	integration@000a90000a1c12a1.82c2m2dew@chatter.salesforce.com		✓	Analytics Cloud Integration User
☐ Edit	User Security	sec	inheightsecurity@000a90000a1c12a1.82c2m2dew@chatter.salesforce.com		✓	Analytics Cloud Security User
☐ Edit	User User	UUser	test-sec2c2m2dew@chatter.salesforce.com		✓	System Administrator



The screenshot shows the 'Setup Users' page with the details of the 'User User' user. The 'Edit Assignments' link is highlighted with a red box and labeled '1'.

Created By: User User, 1/31/2025, 6:51 AM

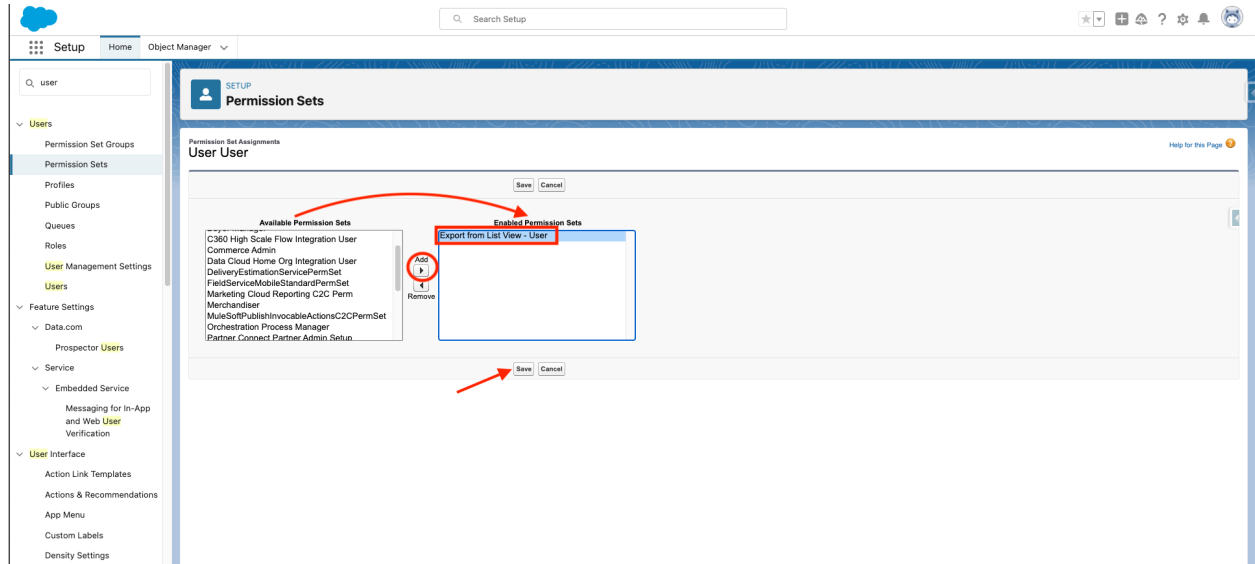
Modified By: User User, 1/31/2025, 7:41 AM

Permission Set Assignments: [Edit Assignments](#)

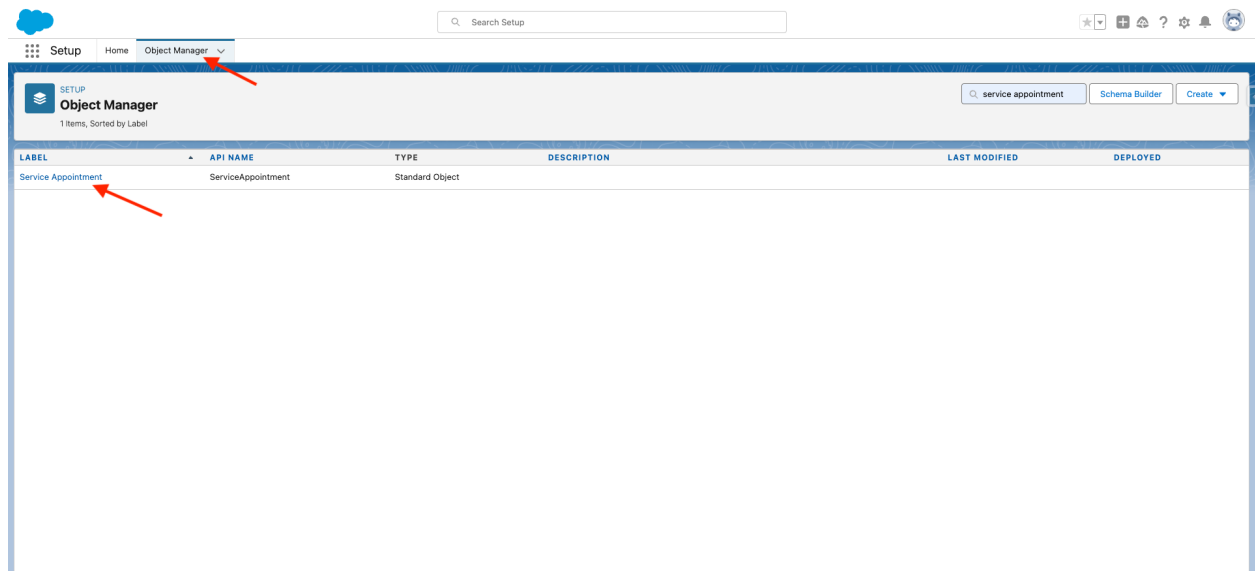
Permission Set Assignments: Activation Required: [Edit Assignments](#)

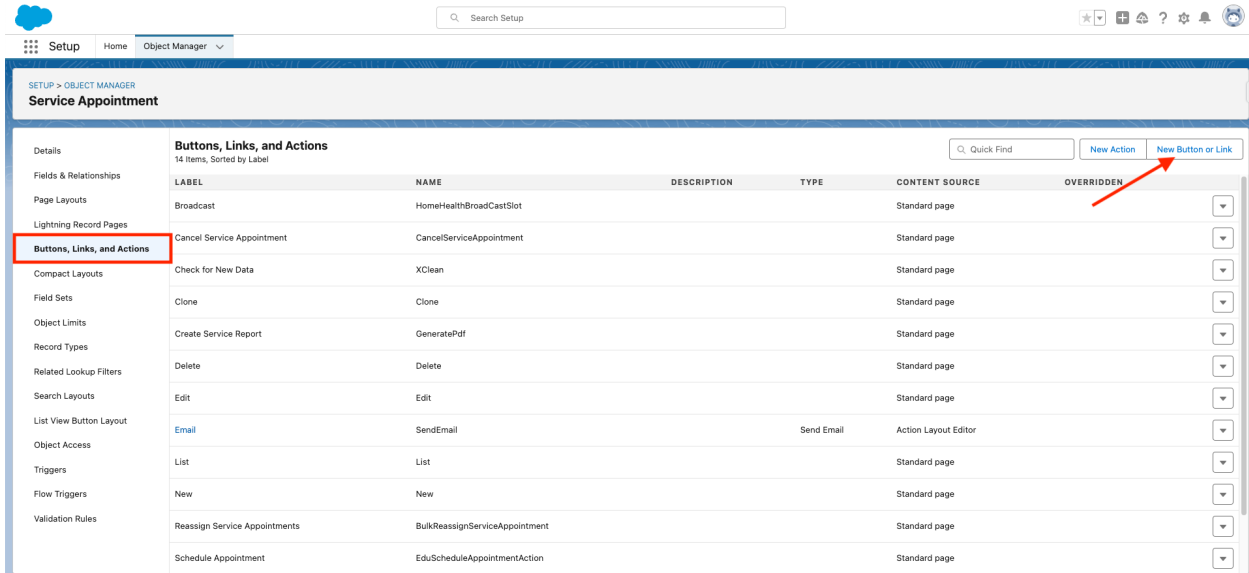
Permission Set Group Assignments: [Edit Assignments](#)

Permission Set License Assignments: [Edit Assignments](#)



- On Setup Object Manager, create a “New Button or Link” for the “Export List View” functionality in the desired object (button already exists by default on: Account, Case, Contact and Opportunity)

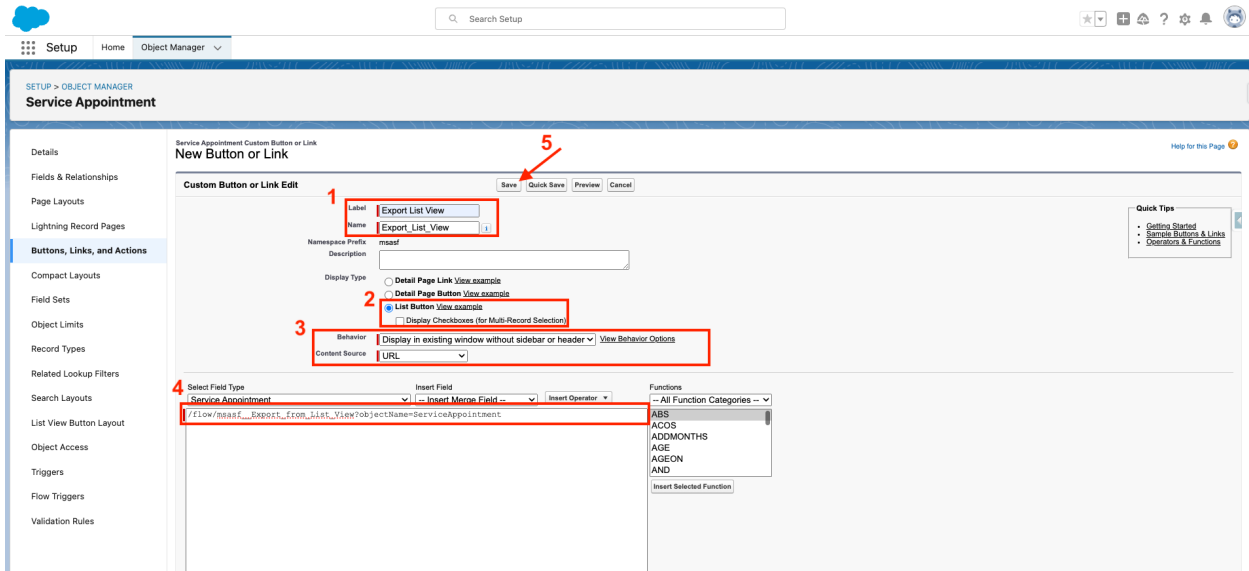




Service Appointment

Buttons, Links, and Actions

LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Broadcast	HomeHealthBroadCastSlot			Standard page	
Cancel Service Appointment	CancelServiceAppointment			Standard page	
Check for New Data	XClean			Standard page	
Clone	Clone			Standard page	
Create Service Report	GeneratePdf			Standard page	
Delete	Delete			Standard page	
Edit	Edit			Standard page	
Email	SendEmail		Send Email	Action Layout Editor	
List	List			Standard page	
New	New			Standard page	
Reassign Service Appointments	BulkReassignServiceAppointment			Standard page	
Schedule Appointment	EduScheduleAppointmentAction			Standard page	



Service Appointment Custom Button or Link

New Button or Link

Custom Button or Link Edit

Label: Export List View

Name: Export_List_View

Namespace Profile: msasf

Description:

Display Type: ☐ Detail Page Link View example ☐ Detail Page Button View example ☒ List Button View example ☐ Display Checkboxes for Multi-Record Selection

Behavior: ☒ Display in existing window without sidebar or header ☐ View Behavior Options

Content Source: URL

Select Field Type: Service Appointment

Insert Field: Insert Merge Field

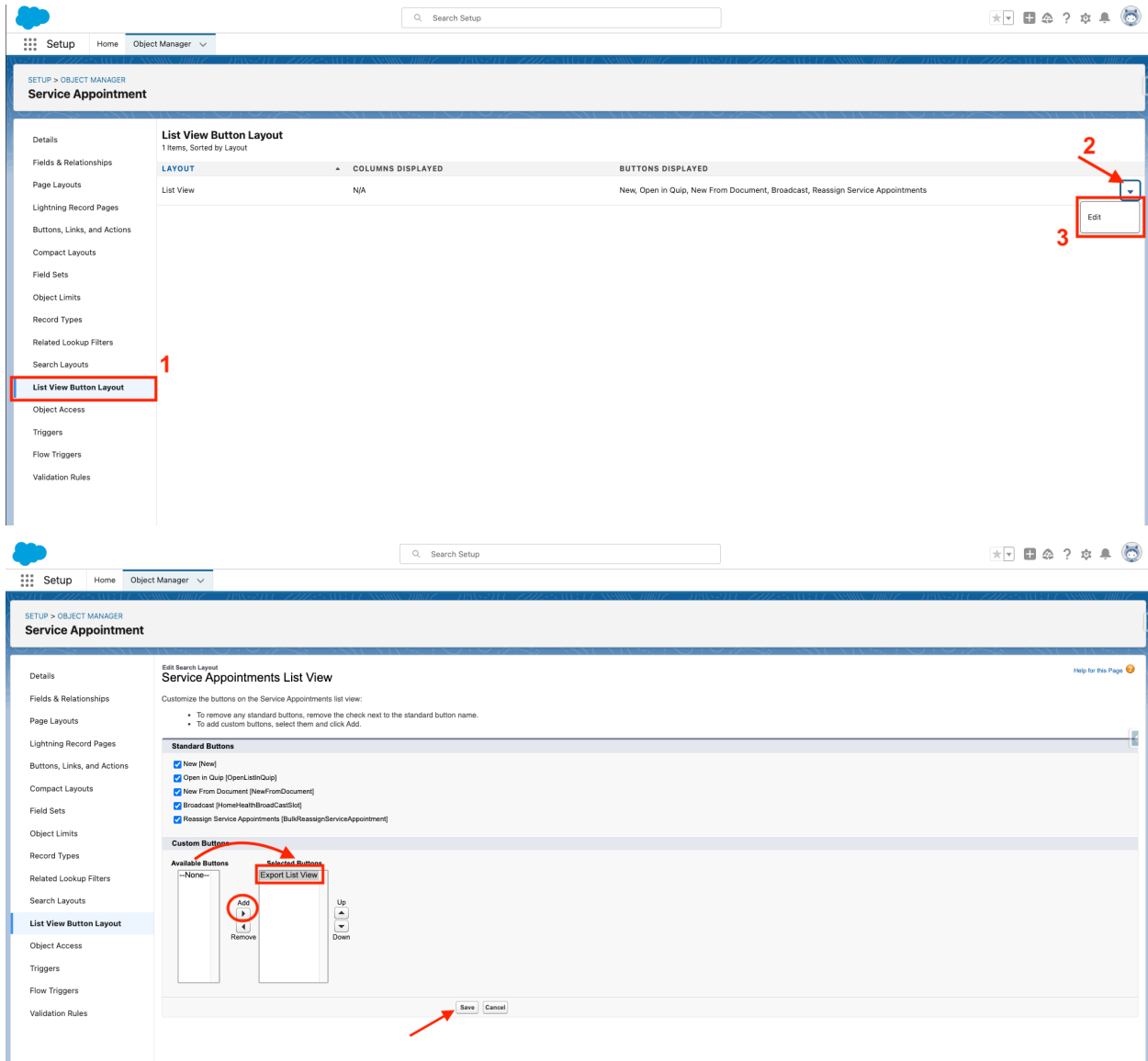
Insert Operator:

Functions: -- All Function Categories --

URL: /flow/msasf__Export_from_List_View?objectName=ServiceAppointment

URL: /flow/msasf__Export_from_List_View?objectName=<OBJECT_API_NAME>
 <OBJECT_API_NAME>: can be found in the *Details* tab on the top left corner

3. Still on the desired object setup, add the newly created button to the “List View Button Layout”



The first screenshot shows the 'Service Appointment' setup page in the 'List View Button Layout' section. The left sidebar has 'List View Button Layout' highlighted with a red box and a red arrow labeled '1'. The main content area shows a table with columns 'LAYOUT', 'COLUMNS DISPLAYED', and 'BUTTONS DISPLAYED'. The 'List View' layout is shown with 'N/A' columns and a list of buttons: 'New, Open in Quip, New From Document, Broadcast, Reassign Service Appointments'. A red box labeled '3' highlights the 'Edit' button in the top right corner, with a red arrow labeled '2' pointing to it.

The second screenshot shows the 'Service Appointments List View' configuration page. The left sidebar has 'List View Button Layout' highlighted with a red box and a red arrow labeled '1'. The main content area shows the 'Standard Buttons' section with a list of buttons: 'New [New]', 'Open in Quip [OpenListInQuip]', 'New From Document [NewFromDocument]', 'Broadcast [HomeHealthBroadcastSlut]', and 'Reassign Service Appointments [BulkReassignServiceAppointment]'. The 'Custom Buttons' section shows 'Available Buttons' and 'Selected Buttons'. The 'Export List View' button is highlighted with a red box and a red arrow labeled '2'. The 'Add' button is circled with a red arrow labeled '3'. The 'Save' button is highlighted with a red arrow labeled '4'.

4. Now it is ready to use

