

Smart Lists Release Notes

Spring 24 – 3.5.0 – Technical Fix

Salesforce thanks [schoobydrew](#) for identifying and responsibly reporting this issue.

Winter 24 – 3.4.0 – Major Release

New Features

Better user experience with the new Create/Edit record form

The screenshot shows the 'New Case' form in Salesforce. The form is divided into several sections: 'Case Information', 'Additional Information', and 'Description Information'. The 'Case Information' section includes fields for Case Owner (Francois Medioni), Case Number, Contact Name (with a search box), and Account Name (with a dropdown menu showing 'Acme'). The 'Additional Information' section includes fields for Status (New), Type (--None--), Case Origin (Email), Case Reason (--None--), Priority (Medium), and Parent Case. The 'Description Information' section includes a Subject field. A red error message box is displayed over the Subject field, stating 'Errors(s) Review the following fields' and listing 'Subject'. A blue callout box points to the 'Page layout Sections' header. Another blue callout box points to the 'Acme' dropdown menu, stating 'New record: Parent visible'. A third blue callout box points to the error message box, stating 'Improved error messages'. A fourth blue callout box points to the footer area, stating 'Footer always visible'. The footer area contains 'Cancel' and 'Save' buttons.

Dynamic Styling of columns

Columns can be dynamically styled with colored icons

	<input type="checkbox"/> Name ↑	Rating
1	<input type="checkbox"/> Andy Smith	?
2	<input type="checkbox"/> Jim Steele	🚩
3	<input type="checkbox"/> John Gardner	🚩
4	<input type="checkbox"/> Mark Li	?
5	<input type="checkbox"/> Mike Braund	🚩
6	<input type="checkbox"/> Norm May	🚩
7	<input type="checkbox"/> Patricia Feager	Hot
8	<input type="checkbox"/> Violet Maccleod	🚩 ✎

Columns can be dynamically styled with colored text and icons

Percent
123.23% ↑
68.24% ↑
2.53% ↓
52.00% =

Improved user experience in tables

Values can now be aligned in the columns

Align Left	Align Center	Align Right
<input type="checkbox"/> Currency	<input type="checkbox"/> Currency	<input type="checkbox"/> Currency
\$16.32	\$16.32	\$16.32
\$3,256.30	\$3,256.30	\$3,256.30
\$956.30	\$956.30	\$956.30
\$1,123.00	\$1,123.00	\$1,123.00

Tooltips are displayed if the value is truncated

<input type="checkbox"/>	Case Number	Subject	Des
2	<input type="checkbox"/> 00001000	Our samples have not been deli...	The
3	<input type="checkbox"/> 00001002	C	The
4	<input type="checkbox"/> 00001001	The shirts we received are the ...	The

Our samples have not been delivered



New parameter 'Table Height in Pixels' for setting a fixed height to the table

Fixed height with 3 records				Fixed height with 1 record																											
<p>Sample Cases List Close</p> <p>3 items • Sorted by Last Modified Date</p> <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Case Number</th> <th>Subject</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>2</td> <td><input type="checkbox"/> 00001000</td> <td>Our samples have not ...</td> <td>The customer didn't receive the samples: wrong shipping address</td> </tr> <tr> <td>3</td> <td><input type="checkbox"/> 00001002</td> <td>Cannot track our order.</td> <td>The customer is not able to track the order with the provided tracking number</td> </tr> <tr> <td>4</td> <td><input type="checkbox"/> 00001001</td> <td>The shirts we received...</td> <td>They ordered XL and received XXL</td> </tr> </tbody> </table>				<input type="checkbox"/>	Case Number	Subject	Description	2	<input type="checkbox"/> 00001000	Our samples have not ...	The customer didn't receive the samples: wrong shipping address	3	<input type="checkbox"/> 00001002	Cannot track our order.	The customer is not able to track the order with the provided tracking number	4	<input type="checkbox"/> 00001001	The shirts we received...	They ordered XL and received XXL	<p>Sample Cases List Close</p> <p>1 item • Sorted by Last Modified Date</p> <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Case Number</th> <th>Subject</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>2</td> <td><input type="checkbox"/> 00001002</td> <td>Cannot track our order.</td> <td>The customer is not able to track the order with the provided tracking number</td> </tr> </tbody> </table>				<input type="checkbox"/>	Case Number	Subject	Description	2	<input type="checkbox"/> 00001002	Cannot track our order.	The customer is not able to track the order with the provided tracking number
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2	<input type="checkbox"/> 00001002	Cannot track our order.	The customer is not able to track the order with the provided tracking number																												

New parameter 'Wrap Column Headers' for wrapping the header of a column on up to 3 lines

Text Area Long	Time	URL
<p>Lorem... </p> <p>Lorem ipsum dolor sit amet, consectetur adipisicing elit. Cum, quaeat? Accusamus excepturi eos, molestias expedita distinctio eligendi ut esse quasi!</p>	4:15:00 PM	www.google.x

Support for Rich Text Area fields

Product Name	Picture	Description
<input type="radio"/> LG 27-inch		<ul style="list-style-type: none"> Designed for gaming, this monitor with a 1-millisecond (GTG) response time delivers all of the benefits of IPS (In-Plane Switching), delivering responsive, crisp visuals with sharp clarity to immerse you in gameplay. Aspect ratio: 16:9. Specific uses for product - Gaming Color accuracy with sRGB 99% and wide viewing angles (up to 178° horizontal / 178° vertical) from IPS reproduce colors with high fidelity to being vivid scenes to life A high native 144Hz refresh rate with 1-millisecond Motion Blur Reduction keeps you firmly in the action while reducing blur and ghosting, rendering screen objects more clearly With compatible video cards, NVIDIA G-SYNC and AMD FreeSync Premium virtually eliminate screen tearing and minimize stutter in high-resolution and fast-paced games for a fast and fluid gaming experience Dynamic Action Sync helps reduce input lag to help you respond to on-screen action quickly. Black Stabilizer dynamically brightens dark scenes to help you find enemies in the dark. Enhance your accuracy in firefights with the Crosshair feature
<input type="radio"/> Dell 27-inch		<p>SUPERIOR SCREEN With a three-sided ultrathin bezel design that lets you to see more without interruptions, high functionality meets superb style. Enjoy crisp visuals with an impressive 4.0ms response time. Specific uses for product - Business. Pixel per inch (PPI) : 163. Operating Temperature : 0°C to 40°C (32°F to 104°F)</p> <p>COMFORT COMES FIRST Customize your views with a height-adjustable stand and a monitor that tilts, swivels and pivots so you look your best and feel your best during work sessions or movie binges.</p> <p>VERSATILE CONNECTIVITY Easily charge and connect your laptop on this USB-C monitor. This single-cable solution reduces clutter on your desktop and transmits power, video, audio and data—all at once.</p> <p>INTEGRATED SPEAKERS This usb-c monitor comes equipped with everything you need including built-in dual 3W integrated speakers.</p>

Improved inline edit

- Text Area are now edited in a text area field of a text one
- Multi-select inline edit is now partly available for picklist and lookup fields

	Name	Account Name	Boolean
1	<input checked="" type="checkbox"/> Record1	Burlington Textiles Corp of America	<input type="checkbox"/>
2	<input checked="" type="checkbox"/> Record2		<input type="checkbox"/>
3	<input type="checkbox"/> Record3		<input type="checkbox"/>

Update 2 selected items

Cancel Apply

Note: if you want to use this feature, make sure that users don't check Update x selected items before selecting a value

Winter 24 – 3.3.0 – Major Release

New Features

Edit the data of the list in the table without the restrictions of the standard List Views and Related Lists

The new property 'Inline Edit' on Field Definition allows you to edit the value of a cell in a table even if the list contains records from multiple record types

The screenshot shows a table titled "Sample Cases List" with 2 items, sorted by Last Modified Date. The table has the following columns: Case Number, Subject, Description, Contact, Last Modified Date, and Status. The second row is selected, and the "Contact" field is being edited. A dropdown menu is open, showing "Tom Ripley" as the selected option. The "Status" field for the second row is "On Hold".

<input type="checkbox"/>	Case Number	Subject	Description	Contact	Last Modified Date	Status
<input type="checkbox"/>	00001022	Power generation b...	Output is between 70-75% of e...	John Bond	01/14/2024, 03:45 PM	New
<input type="checkbox"/>	00001016	Starting up generator...	The consumption is 2kWh abov...	Tom Ripley		On Hold

Buttons: Cancel, Save

All records are loaded

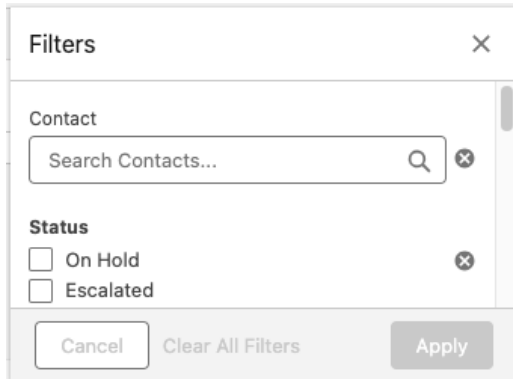
Summer 23 – 3.2.0 – Major Release

New Features

Improved Filters panel

For lists with many filters, it was necessary to scroll in the page to display all the filters and click the Filters Panel buttons

The new parameter 'Filters Panel Max Height' is used to define the maximum height in pixels of the panel. The panel is scrollable if the height of the filters is higher than the height of the panel



Support Additional Use Cases with the Search Component

Users may need to search records and take action on the returned records.

A screenshot of the 'Search Leads' interface. At the top left, there is a star icon and the text 'Search Leads'. Below this, it says '2 Items selected • Sorted by Name • Filtered by Rating'. On the right, there is a search bar 'Search this list...' and a dropdown menu 'All'. A button 'Add to Campaign' is also visible. The main area contains a table with columns: Name, Rating, Owner, Email, and Company. The table lists several leads, with 'Bertha Boxer' and 'Norm May' selected. On the left, there is a 'Filters' panel with sections for 'Name', 'Rating' (with 'Hot' selected), 'Owner' (with 'Users' selected), and 'Company'. At the bottom of the filters panel are 'Cancel', 'Clear All Filters', and 'Apply' buttons. The bottom right of the table area says 'All records are loaded'.

Name	Rating	Owner	Email	Company
<input type="checkbox"/> Andy Smith	Hot	North East	asmith@ubuilding.com	Universal Technologies
<input checked="" type="checkbox"/> Bertha Boxer	Hot	John Nguyen	bertha@fcf.net	Farmers Coop. of Florida
<input type="checkbox"/> Betty Bair	Hot	Harry Stevenson	bblair@abankingco.c...	American Banking Corp.
<input type="checkbox"/> Carolyn Crenshaw	Hot	William Harper	carolync@aceis.com	Ace Iron and Steel Inc.
<input checked="" type="checkbox"/> Norm May	Hot	William Harper	norm_may@greenwi...	Greenwich Media
<input type="checkbox"/> Sarah Loehr	Hot	Salesforce Labs	sarah.loehr@medlife...	
<input type="checkbox"/> Shelly Brownell	Hot	Harry Stevenson	shellyb@westerntele...	Western Telecommunica...
<input type="checkbox"/> Violet Maccleod	Hot	North East	violetm@emersontra...	

3 new parameters have been added for turning a Smart List into a search component:

- Filters Panel Layout: allows to position the filters panel on the left of the list which is the natural sequence for a search component
- Disable Autoload on Initialization: when this parameter is checked, no records are loaded in the list when it is displayed for the first time. This tells users that they must use the filters panel first
- Disable Paging: for use cases where the requirement is to take action on all records matching specific criteria, check this parameter to load all the records Apply is clicked. It will remove the need of scrolling in the list to get all the records

Enhanced List Actions

In the previous versions, list actions could only be used on records selected in the list. With the new parameter 'List Action Availability', it is now possible to cover additional use cases:

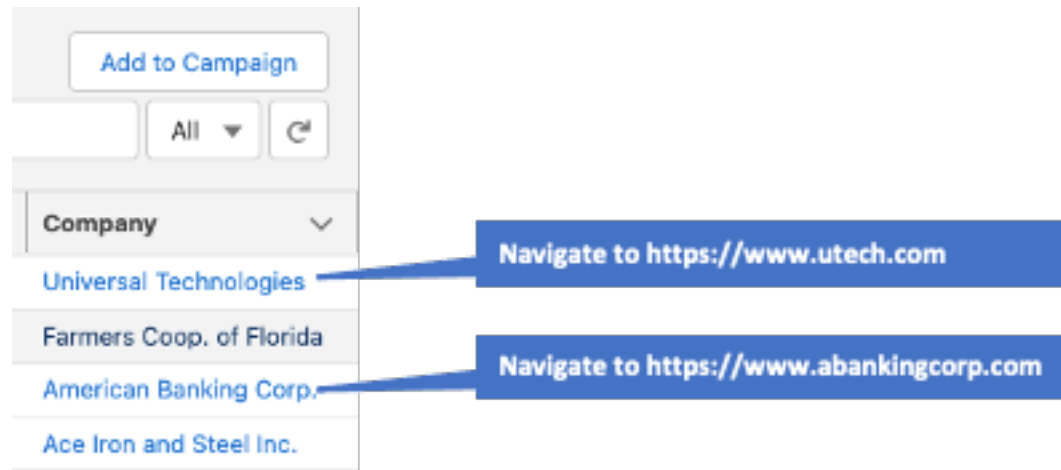
Value	Available when	Records passed to the flow
When Records are Selected	One or more records are selected in the list Example: close selected cases	Selected records
When Records are Loaded	Records are loaded in the list Example: add the contacts returned by a search to a campaign	Loaded records
Always	Available all the time Example: custom New record action	Loaded records or empty array if no records loaded

The new parameter 'parentId' is now passed to the flows action of child list. For example, an action on a list of cases of an account will receive the id of the parent account in this parameter

New Display Type for displaying clickable labels that navigate to a URL

The new URL with Label display type allows to create columns of clickable labels that navigate to a URL.

The values of the label and the URL comes from 2 fields.



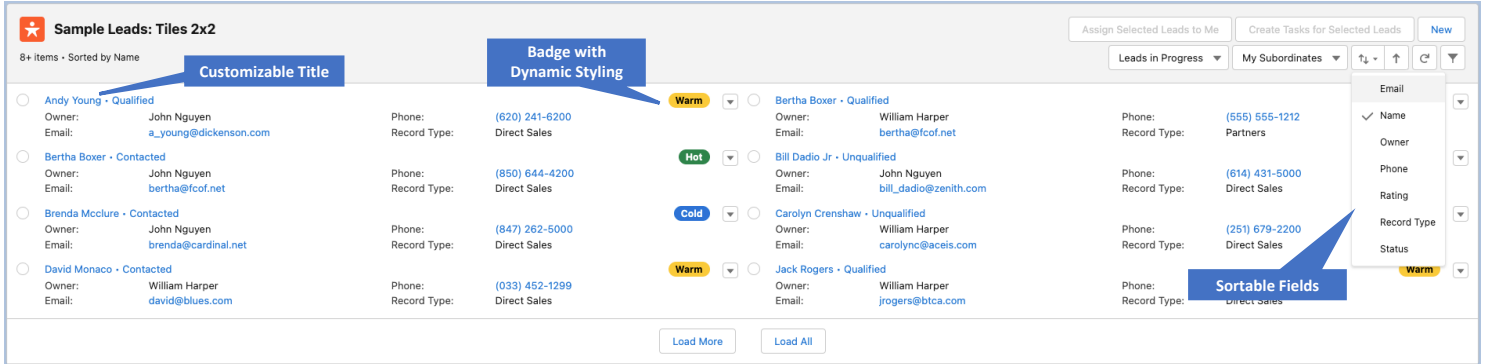
More filtering capabilities

The new 'My Queues' filter returns the records owned by the queues the running user is member of

Summer 23 – 3.0.0 – Major Release

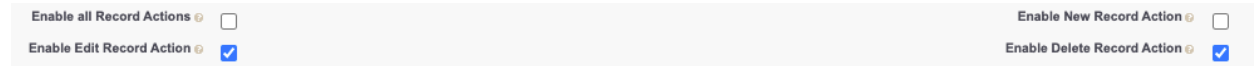
New Features

Lists can now be displayed as highly customizable tiles

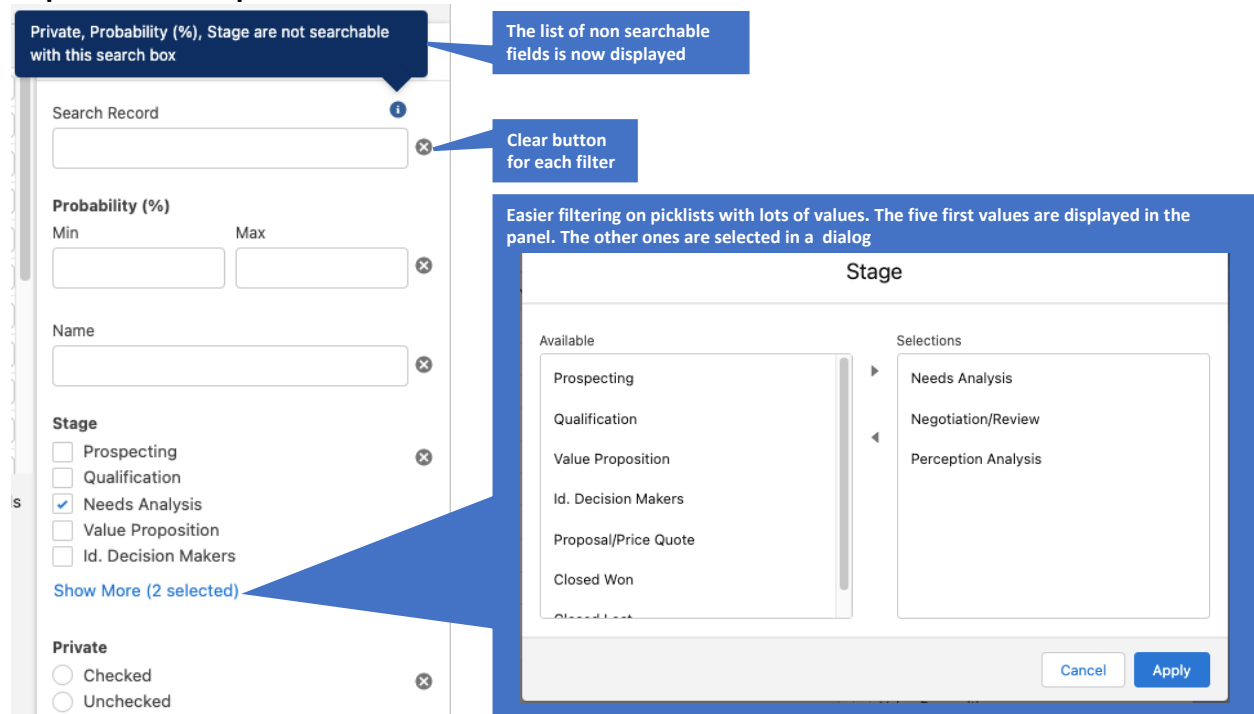


Better control on the record actions

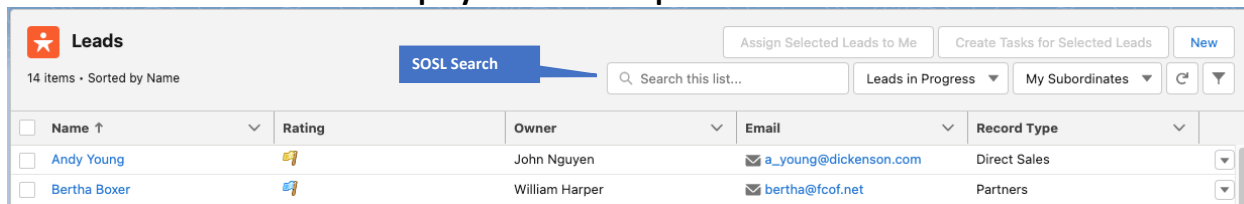
With Summer 23, it is now possible to enable individual record actions with these new settings on the list definition:



Improved Filters panel



The SOSL search box can be displayed in the component



More filtering capabilities

- The new 'My Subordinates' filter returns the records owned by the direct subordinates of the running user in the role hierarchy
- 'My' is now supported by the SOSL search as well as the new 'My Subordinates' filter

Record actions are now available with Apex Data Source

External Objects are now supported (Beta)

More capabilities with Screenflows:

- Reactive flows are supported
- A new output variable has been added: Selected Records Count

Less configuration required

SmartLists is now able to populate default values:

- List label
- List icon
- Hyperlink Id Field

The default values can be overridden with your own values

Spring 23 - 2.3.0 – Major Release

New Features

Advanced filtering capabilities in Quick Filters

It is now possible to filter a list based on related records, record types and record owner

The image displays three side-by-side screenshots of the 'Quick Filters' interface, illustrating advanced filtering capabilities. Each screenshot shows a 'Contact' search field with the value 'jack'. The first screenshot highlights the 'Owner' dropdown menu, which is set to 'Users' and includes a search field. A blue callout box labeled 'Search by Related Records' points to this search field. The second screenshot highlights the 'Record Type' section, which has 'Documentation Request' selected. A blue callout box labeled 'Search by Record Type' points to the 'Record Type' dropdown menu. The third screenshot highlights the 'Owner' dropdown menu, which is set to 'Queues' and includes a search field with the value 'ele'. A blue callout box labeled 'Search by Record Owner' points to this search field. Below the search fields, there are sections for 'Last Modified Date' (with 'Start' and 'End' date pickers) and 'Status' (with checkboxes for 'New', 'Working', 'Escalated', and 'Closed').

Screenflow: validate that records have been selected before navigating to the next screen
Specify the minimum number of selected rows for being able to move to the next screen

The image shows a 'Smart List' configuration screen. At the top, there is a back arrow and the text 'Smart List'. Below this, there are several configuration fields:

- * API Name:** LeadsSmartList
- * Input Type for Selected Records parameter:** Lead
- * INTERNAL - Must be set to {!\$GlobalConstant.True}:** {!\$GlobalConstant.True}
- List Definition Name:** SLHomeLeads
- Minimum Row Selected:** 1 (This field is highlighted with an orange border)
- Record ID:** Enter value or search resources...

Implement more child lists use cases with Indirect Relationships

Previously, it was possible to configure child lists with a direct relationship to the parent record. For example, a list of Cases for a parent Account.

Indirect Relationships allows you to configure more complex relationships such as a list of Files associated to the Account of the parent Case or a list of Cases associated to the Department of the parent Account

Spring 23 - 2.2.0 – Minor Release

New Features

More filtering capabilities for your Predefined Filters

It is now possible to filter a list based on the running user by using the variable USERID.

Examples:

- Records I created or modified: CreatedById = USERID OR LastModifiedById = USERID
- Records I approved: Approver__c = USERID

Better support of Shield Deterministic Encryption

Fields encrypted with Deterministic Encryption are now searched with the exact value provided in the Quick Filters widget (= Operator). Non encrypted fields are still searched with the LIKE operator

Winter 23 - 2.1.0 – Minor Release

New Feature

Support for HTML formatted formula fields. Note: the maximum height of the field is 19px

Winter 23 - 2.0.0 – Major Release

Considerations

Make sure your orgs are upgraded to Winter 23 before installing this version

New Features

Customizable Quick Filters widget

Previously, all filterable fields of the list were automatically displayed in the Quick Filters, and it was possible to filter on fields not displayed in the list. Admins can now specify which fields are displayed in the Quick Filters and their display position in the widget with 2 new Smart List Field parameters: *Display in Quick Filters* and *Display Position in Quick Filters*

The screenshot shows the 'Smart List Field Edit' interface. The 'Information' section contains 'Label' (Cases - Status) and 'Smart List Field Name' (Cases_Status). The 'Field' section contains 'Smart List Definition' (Sample Cases List), 'Field Label' (empty), 'Display in List' (checked), 'Display in Quick Filters' (Yes if Filterable), 'Field Name' (Status), 'Display Position in List' (4), and 'Display Position in Quick Filters' (1). The 'Display in Quick Filters' and 'Display Position in Quick Filters' fields are highlighted with an orange border.

Specify which fields are sortable in the list

Previously, all fields of the list were sortable in the list if they were sortable at the object level. Admins can now specify which fields are sortable to avoid performance issues by using this new Smart List Field parameter *Sortable in List*

The screenshot shows the 'Smart List Field Edit' interface. The 'Information' section contains 'Label' (Cases - Subject) and 'Smart List Field Name' (Cases_Subject). The 'Field' section contains 'Smart List Definition' (Sample Cases List), 'Field Label' (empty), 'Display in List' (checked), 'Display in Quick Filters' (Yes if Filterable), 'Display Type' (String), and 'Sortable in List' (No). The 'Sortable in List' field is highlighted with an orange border.

Specify the width of a column

Previously, the width of the columns was determined by the system. You now have the option to specify the width of a with this new Smart List parameter *Column Width*

The image shows the 'Smart List Field Edit' form. In the 'Field' section, the 'Column Width' parameter is highlighted with an orange box and set to '250'. Other parameters include 'Smart List Definition' (Sample Cases List), 'Field Label', 'Display in List' (checked), 'Display in Quick Filters' (No), 'Display Type' (String), and 'Sortable in List' (No).

Wrap text in cells

Previously, the content of the cells was displayed on one line and was clipped if it was longer than the width of the cell. Administrators can now specify which fields are wrapped and how many lines of text to display in a wrapped cell with 2 Smart List Definition and Smart List Field new parameters: *Wrap Text Max Lines* and *Wrap*

The image shows two screenshots of the configuration interface. The top screenshot is the 'Smart List Definition Edit' form, where the 'Wrap Text Max Lines' parameter is highlighted with an orange box and set to '3'. The bottom screenshot is the 'Smart List Field Edit' form, where the 'Wrap Text' checkbox is highlighted with an orange box and checked. The 'Field' section in the bottom screenshot also shows 'Column Width' set to '250' and 'Field Name' set to 'Description'.

More capabilities in Screenflows

- Smart Files are now available in Screenflows
- CRUD actions, standard files actions and Auto-launched flow actions are now available

More capabilities in Communities

- Screenflow actions are now available

Apex Data Sources can now be related to a parent record:

See Documentation

Improved Documentation

- Guided Setup Section
- Improved documentation for Apex Data Sources

Upgrade from Summer 22

It is recommended to populate the new attributes on your Field Definition records:

- Display in Quick Filters
- Display Position in Quick Filters
- Sortable in List

Update your data sources according to the documentation

Summer 22 - 1.0.0.0 - Initial Release