

Deep Lists — User Guide

Deep Lists lets administrators build list views once and publish them to the right people, instead of every user building their own. This guide covers both sides: the admin console and the end-user experience.

Part 1 — For administrators

Open **List View Manager** from the App Launcher. The console has four tabs.

The List Views tab

Every managed view in the org, with its object, status, audience, 30-day open count, and last modified date.

- **Object rail (left)** — filter to a single object. Counts show how many views target each.
- **Status checkboxes** — Published, Draft, Scheduled, and Retired. Retired is unchecked by default; tick it to see retired views (and to restore them).
- **Search** — filters by view name.
- **Column headers** — click to sort.
- **Row menu (▼)** — Edit, Clone, Publish/Unpublish, View analytics, and Retire or Restore.

Clicking a view's **name** opens it read-only. **Edit** in the row menu opens it for changes.

Creating a view

1. Click **New List View**.
2. Pick the object. Common objects appear as chips; use the search box for anything else.
3. Choose a starting point:
 - **Start from scratch** — an empty view you configure yourself.
 - **Clone an existing view** — copies columns, filters, and sort from another view on the same object.
 - **Start from a template** — a ready-made set of columns, filters, and sort. Templates exist for Account, Contact, Opportunity, Case, and Lead; other objects offer scratch and clone only. A template that refers to a field your org does not have, or that you cannot see, is not offered.
4. Name it and click **Create**. The Builder opens.

The Builder

Three panes: configuration on the left, live preview on the right.

Columns. Add fields from the picker, drag to reorder. The first column is locked — it is the record's name and links to the record when a user opens the view. Related fields are available as `Account (name)` style entries, which resolve to `Account.Name`.

Filters. Each filter is a field, an operator, and a value.

Operator	Use for
equals / not equal to	Exact matches
less than / greater than / less or equal / greater or equal	Numbers, dates, currency
contains / does not contain / starts with	Text and picklists

Deep Lists offers exactly the nine operators a Salesforce list view filter offers. For several values, put them all under **equals** separated by semicolons.

Date and date/time fields take a date written plainly — 9/9/2026 — or a relative date such as TODAY , THIS_MONTH or Last 90 Days , which stays correct as time passes. On a date/time field such as Created Date, a plain date covers the **whole day**.

See the [Filter Reference](#) for the exact format every field type expects, and for what to check when a filter appears to do nothing.

Filter logic. By default every filter is ANDed. To express something else, type a logic string such as 1 AND (2 OR 3) . If the logic references a filter that has been removed or is invalid, Deep Lists falls back to ANDing the valid filters rather than failing.

Sort. Add one or more sort fields in precedence order.

Live preview. The right pane runs the real query as you type and shows up to 50 matching records plus a total count. It runs as *you*, so the count reflects your own record access — another user with narrower access will see fewer.

Changes save as a draft automatically. Publishing is a separate, deliberate step.

Publishing

Click **Publish** in the Builder, or **Publish...** from a row menu.

1. **Choose the audience.** Search for users, roles, or public groups and add them as chips. You can mix all three. Overlapping audiences are fine — Deep Lists counts unique users.
2. **Watch the reach counter.** It updates live and tells you exactly how many distinct people will receive the view.
3. **Choose the timing.** Publish now, or schedule a date and time.
4. **Add a version note** describing what changed. It appears in the version history.
5. Click **Publish**.

Publishing snapshots the current configuration as an immutable version. The previously live version becomes "Superseded" — nothing is lost.

That snapshot is what your users are served. Editing a published view and saving a draft changes nothing for them; they keep seeing the version you last published until you publish again. That is deliberate — it means you can revise a view over several days without users watching it change under them. You do not need to remember to save before publishing, either: **Publish** commits whatever is on screen first.

If the org setting **Notify on assignment** is on, everyone who *gains* access is notified. Republishing to an audience that already had the view is silent, so editing columns does not notify the same people again.

How they are notified is your choice. Out of the box it is a Salesforce in-app notification that opens My Views. Switch **Deliver by** to *Platform event* and Deep Lists instead publishes a `List_View_Assigned__e` event per recipient, which a Flow you build can turn into email, Slack, a Chatter post, or anything else — with your wording and your conditions. The [Flow Integration Guide](#) has the event's fields and worked examples.

Scheduled publishing. Choosing a future date stages the change rather than applying it. What happens next depends on whether the view is already live:

The view is	Its status becomes	Your users
Not yet published	Scheduled	Still cannot see it — nothing has gone live
Already published	stays Published , shown as "Published · update date"	Keep the view exactly as it is , on the version you last published

The second row is the important one. Scheduling an update to a live view never takes it away from the people who have it. The new columns and the new audience are held back together and swap in as one change when the maintenance job activates them, on the first hourly run after the scheduled time. The job must be switched on for scheduling to do anything at all — the Settings tab shows whether it is, and the List Views tab warns you if it isn't.

Cancelling a scheduled publish. While a publish is pending, the row menu offers **Cancel scheduled publish**. It drops the staged change and leaves a live view completely untouched — same version, same audience, nobody affected. A view that was never live goes back to Draft. This is not the same as Unpublish, which takes the view away from everyone; both ask you to confirm, and the confirmation says which one you are about to do.

If you are a Publisher rather than an Administrator, you can only publish to people in your own role and the roles beneath it. Selecting anyone outside that is rejected with a count of how many people were out of range — ask an administrator, or narrow the audience.

Unpublishing

Unpublish in the row menu takes a published or scheduled view straight back to Draft. Because it removes the view from everyone who has it, it asks you to confirm first, naming the view and its current audience. It then

disappears from users immediately, any pending schedule is cancelled along with it, and the live version is marked superseded.

Unlike Retire it records nothing — no retirement date, no grace period, no replacement, and no notice to users. The audience is kept, so republishing restores exactly the same people without rebuilding the list. Use Unpublish to take something down while you work on it; use Retire to withdraw it for good and point people somewhere else.

Cloning

Clone copies a view's columns, filters, filter logic, and sort into a new Draft named "*original (copy)*" and opens it in the Builder.

The audience and version history are deliberately not copied. A clone is a new view nobody has been given yet — copying the audience would put something unreviewed in front of people.

The Assignments tab

Manage audiences for a view after it is published, without republishing.

- Pick a view from the rail on the left.
- The table shows each audience, its type, how many users it resolves to, when it was added, and by whom.
- **Add audience** grants access to more people.
- The row menu removes an audience — those users lose the view immediately.
- An **overlap note** appears when someone is reached by more than one audience. They still see the view once.
- A row badged "**Needs review**" has a stored audience Id that no longer resolves to a real user, role, or group. Remove it and re-add the audience.

The Analytics tab

- **KPI strip** — total views, how many are published, unique users reached, and 30-day opens with a trend against the previous 30 days.
- **Per-view cards** — a 7-day sparkline, 30-day open count, audience pills, and a summary of the view's configuration.
- **Needs attention** — three kinds of problem worth acting on:
 - a **retired view people are still opening**, which usually means the replacement is wrong or was never set;
 - a **stale view** — published, but nobody has opened it inside your stale threshold;
 - a **broken audience** — a published view pointing at a deleted group or role, or a deactivated user, and therefore reaching fewer people than its numbers suggest.

Choosing **View analytics** from a row menu on the List Views tab opens this tab focused on that one view; **Show all views** returns to the full grid.

Analytics reflect the last maintenance run, not the last second. Opens shown on the *List Views* tab come from a rollup the job maintains hourly; the numbers on this tab are calculated live.

Retiring a view

Retiring removes a view from users without deleting anything.

1. Row menu → **Retire**.
2. Deep Lists shows the impact: how many people still use it and how often.
3. **Choose a replacement** (recommended). Deep Lists suggests the closest match by column overlap on the same object. Users see a pointer to it.
4. **Choose the timing:**
 - **Retire immediately** — gone from My Views today.
 - **Grace period** (default 14 days) — users see a "retiring soon" notice with a link to the replacement, then it disappears.
5. Click **Retire**.

Configuration, audiences, and version history are all preserved.

Restoring a retired view

1. Tick the **Retired** status checkbox on the List Views tab.
2. Row menu → **Restore...**
3. The dialog shows whether the view is still in its grace period and where users are currently being pointed.
4. **Choose where it comes back:**
 - **Draft** — nobody sees it until you publish. Safest, and the default.
 - **Published** — live again immediately for the audiences it still has. Only available if audiences remain.
5. Click **Restore**.

Restoring clears the retirement date, the grace period, and the replacement pointer. Columns, filters, audiences, and version history are untouched.

Retire and Restore both require the `LVM_Retire_Views` custom permission.

The Settings tab

Requires the `LVM_Manage_Settings` custom permission. Everyone else can see the values but not change them.

Setting	What it does
Notify on assignment	Master switch for telling users a view was published to them
Notify users when a view is retired or removed from them	Tells people when they lose a view — retired, unpublished, or their audience removed. Separate switch from assignment, because announcing new views and announcing churn are different decisions
Deliver by	<i>In-app notification</i> (the package sends it), <i>Platform event</i> (Deep Lists publishes <code>List_View_Assigned__e</code> and your own Flow decides the channel and wording), or <i>Both</i> . See the Flow Integration Guide
Grace period	The default number of days the Retire dialog offers
Let users hide views	Adds a hide control to My Views. Hiding is personal and never changes the audience
Collect analytics	When off, no record of who opened what is written at all. Turning it off stops collection immediately; existing history is kept until it ages out
Stale view alerts	A published view with no opens for this long is flagged in Needs attention
Keep usage history for	How long individual open records are kept. Minimum 60 days, because the 30-day trend compares against the previous 30

Below the settings is the **maintenance job**, and it is the one thing to turn on after installing. Salesforce does not let a package schedule itself, so until you click **Schedule hourly** the job never runs — which means scheduled publishes never activate, the Opens column stays empty, stale and broken-audience flags never update, and usage history never gets pruned.

Run now performs a single pass immediately, which is useful after changing the stale threshold or retention and wanting to see the effect without waiting an hour.

Also on this tab: how many users hold each permission set, with a link to manage them.

Part 2 — For end users

Open **My Views** from the App Launcher.

Your views

Each row is a list view someone has published to you, showing the object, how many records it currently contains *for you*, who published it, and when you last opened it.

- **Open** — click a view to see its records with the columns and filters the publisher chose.

- **Pin** — click the pin icon to keep a view at the top. Pinning is personal to you.
- **New for you** — views assigned to you in the last 30 days appear in a highlighted section. Dismiss it once you have looked.
- **Hide** — if your administrator has enabled it, the ⊗ on the right of a row removes that view from your list. This is personal to you: it does not affect anyone else, and your administrator still counts you in the view's audience. Use the **Hidden** chip to find and restore them.
- **Filter chips** — All, Pinned, New, Recently opened, Retiring, and Hidden.
- **Search and sort** — by name, by object, by publisher, or by most recently opened.

Retiring views

A view marked **RETIRING** is being withdrawn. The row shows the date it disappears and, usually, a link to the replacement your administrator recommends. Switch over before that date.

Why your record count differs from a colleague's

List views in Deep Lists always run as *you*. The columns and filters are the same for everyone, but the records are only the ones you already have access to in Salesforce. Two people opening the same view legitimately see different numbers of records.

If a view is missing

Views appear only while they are published and assigned to you, your role, or a public group you belong to. If one disappears, it was unpublished, retired, or your audience assignment was removed. Your Salesforce administrator can tell you which.