

Smart Lists Release Notes

Winter 26 – 5.0 – Major Release

New Features

SLDS2 Support

Use the new 'SLDS2' parameter on List Definition to style your lists for SLDS2. Refer to the Update from Previous Versions section of the Configuration if you cannot see it.

Smart List Definition Detail Edit Delete Clone

Label	Sample Leads List	Protected Component	☐
Smart List Definition Name	Sample_Leads_List	Namespace Prefix	

▼ List Settings

Data Source Type	SOQL without Sharing	Display Mode	Table
List Label	Sample Leads List	List Icon	
Maximum Number of Records	2,000	Number of Records per Page	4
Disable Autoload on Initialization	☐	Disable Paging	☐
Selectable Rows	☒	Max Row Selected	50
Export to CSV: Display Button	For all Users	Export to CSV: Add Record Id	☐
Hide Load All Button	☐	Default Sort Direction	asc
SLDS2	☒		

Improved Filters Panel

Filters ×

Email contains

All text fields can now be searched with multiple values

Improved Tiles

Sample Leads: Tiles 2x2 (4+) Assign Selected Leads to Me Create Tasks for Selected Leads New

4+ items • Sorted by Name

Leads in Progress ▼ My Subordinates ▼ ☒ ☐ ☐ ☐

☐ Andy Young • Qualified • a_young@dickenson.com Owner: John Nguyen Record Type: Direct Sales Phone: (620) 241-6200 Warm	☐ Bertha Boxer • Qualified • bertha@fcf.net Owner: William Harper Record Type: Partners Cold
☐ Bertha Boxer • Contacted • bertha@fcf.net Owner: John Nguyen Record Type: Direct Sales Phone: (850) 644-4200 Hot	☐ Bill Dadio Jr • Unqualified • bill_dadio@zenith.com Owner: John Nguyen Record Type: Direct Sales Phone: (614) 431-5000 Warm

Select All button for selecting all the records

Scrollable tile

Use the new 'Select All' button for selecting/deselecting all the loaded records and scroll through your records with the scrollbar

Support for more Standard Objects such as ApprovalWorkItem

Support for Guest Users in Digital Experience pages

Winter 25 – 4.0 – Major Release

New Features

Improved Filters Panel

The screenshot displays the 'Filters' panel with three main sections: 'Search of Record Types', 'Search of Related Records', and 'Search of Record Owners'. Each section includes a search input field and a dropdown menu for operators. The 'Search of Record Types' section shows 'Rating' and 'Record Type' filters. The 'Search of Related Records' section shows 'Account Name' and 'Name' filters. The 'Search of Record Owners' section shows 'Owner' and 'Name' filters. A 'Search Operators' dropdown is also visible on the right side of the panel.

Filters

Search of Record Types

Search Record ⓘ

Rating in

Record Type in

2 Option(s) Selected

Direct Sales X Partners X

Search of Related Records

Account Name in

Search Accounts...

University of Arizona X

Search of Record Owners

Name contains

Search Queues...

John Nguyen X Export X

Search Operators

Name contains

Crenshaw X

Search...

equals

not equal to

✓ contains

does not contain

starts with

is null

- Up to 3 filters can now be displayed in a single row of the Filters Panel
- Enhanced search capabilities with the introduction of search operators
- Filters on related records and owners are now multiselect

Winter 25 – 3.9 – Minor Release

New Features

More granular control over Smart Lists features

- The 'Load All' button visibility can be controlled with the new 'Hide Load All Button' property of the List Definition
- Access to the 'Export to CSV' button can be controlled by a custom permission with the new property 'Export to CSV: Display Button' of the List Definition
- The visibility of a custom filter can be controlled by the new property 'Custom Permission' of the Filter
- Null values sorting can now be specified using new options in the Field Definition's 'Sortable in List' property: 'Yes if Sortable (Nulls First)' and 'Yes if Sortable (Nulls Last)'

Smart List for Screenflows improvements

- Smart Lists is now available in Screenflow sections
- When a parent record is selected in a Screenflow, it is now possible to dynamically refresh a child list by updating the parentId property which is now reactive

Other Enhancements

- Beta support for Click-to-Dial data type

Summer 24 – 3.6 – Major Release

New Features

Improved user experience in Tables

The screenshot shows a table titled 'Sample Leads List (20+)'. Above the table, it says '2 items selected • Sorted by Name'. A blue callout box points to the title '(20+)' with the text 'Count of loaded records in List Title'. The table has four columns: 'Name' (with a dropdown arrow), 'HTML Rating' (with a dropdown arrow), and 'Owner'. The first two rows are selected, indicated by checked checkboxes. At the bottom of the table, there are two buttons: 'Load More' and 'Load All'. A blue callout box points to these buttons with the text 'New buttons for Loading More and All records'.

	☐ Name ↑	HTML Rating	Owner
1	☒ Andy Smith	👍	North East
2	☒ Andy Young	👍	John Nguyn
3	☐ Bertha Boxer	👍	William Har
4	☐ Bertha Boxer	👍	John Nguyn
5	☐ Betty Bair	👍	Harry Stev
6	☐ Bill Dadio Jr	👍	John Nguyn
7	☐ Brenda McClure	👍	John Nguyn
8	☐ Carolyn Crenshaw	👍	William Har
9	☐ David Monaco	👍	William Har
10	☐ Eugena Luce	👍	Harry Stev
11	☐ Jack Rogers	👍	William Har

Load More Load All

New buttons for Loading More and All records

Export your lists as CSV files

★ Sample Leads List (20+)

20+ Items • Sorted by Name

Assign Selected Leads to Me

Create Tasks for Selected Leads

New

Search this list...

Leads in Progress

All

Export to CSV

☐	Name ↑	HTML Rating	Owner	Email	Record Type
1	☐ Andy Smith		North East	asmith@ubuilding.com	Direct Sales
2	☐ Andy Young		John Nguyen	a_young@dickenson.com	Direct Sales
3	☐ Bertha Boxer		William Harper	bertha@fcf.net	Partners

Export to CSV

	A	B	C	D	E
1	Name	HTML Rating	Owner	Email	Record Type
2	Andy Smith	Name ↑	Rating		
---	--	--------			
1	☐ Andy Smith	?			
2	☐ Jim Steele	🚩			
3	☐ John Gardner	🚩			
4	☐ Mark Li	?			
5	☐ Mike Braund	🚩			
6	☐ Norm May	🚩			
7	☐ Patricia Feager	Hot			
8	☐ 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
Currency	Currency	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

	☐ Case Number ▾	Subject ▾	Des ▾
2	☐ 00001000	Our samples have not been deli...	The
3	☐ 00001002	C	The
4	☐ 00001001	The shirts we received are the ...	The

Fixed height with 3 records		
Sample Cases List Close 3 items • Sorted by Last Modified Date		
☐ Case Number	Subject	Description
2 ☐ 00001000	Our samples have not ...	The customer didn't receive the samples; wrong shipping address
3 ☐ 00001002	Cannot track our order.	The customer is not able to track the order with the provided tracking number
4 ☐ 00001001	The shirts we received...	They ordered XL and received XXL

Text Area Long	Time	URL
Lorem... 	4:15:00 PM	www.google.com

Lorem ipsum dolor sit amet, consectetur adipisicing elit. Cum, quaeat? Accusamus excepturi eos, molestias expedita distinctio eligendi ut esse quasi!

Support for Rich Text Area fields

Product Name	Picture	Description
☐ LG 27-inch		- 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
☐ Dell 27-inch		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) 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. 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. INTEGRATED SPEAKERS This usb-c monitor comes equipped with everything you need including built-in dual 3W integrated speakers.

Improved inline edit

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

	Name	Account Name	Boolean
1	☒ Record1	☐ Burlington Textiles Corp of America	☐
2	☒ Record2	☐ Update 2 selected items	☐
3	☐ Record3		☐

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 – 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

 **Sample Cases List**

2 Items • Sorted by Last Modified Date

Close Selected Cases

Reopen Selected Cases

Create Account Task

Q Search this list...

Open Cases

All

☐	Case Number	Subject	Description	Contact	Last Modified Date	Status	
3	☐ 00001022	Power generation b...	Output is between 70-75% of e...	John Bond	01/14/2024, 03:45 PM	New	
4	☐ 00001016	Starting up generator...	The consumption is 2kWh abov...	Tom Ripley		On Hold	

Cancel

Save

All records are loaded

Summer 23 – 3.2 – 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

The screenshot shows a 'Filters' panel with a close button (X) in the top right corner. Inside the panel, there is a 'Contact' section with a search bar labeled 'Search Contacts...' and a magnifying glass icon. Below this is a 'Status' section with two checkboxes: 'On Hold' and 'Escalated'. At the bottom of the panel are three buttons: 'Cancel', 'Clear All Filters', and 'Apply'.

Support Additional Use Cases with the Search Component

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

The screenshot shows the 'Search Leads' interface. At the top, there is a header bar with a red star icon, the text 'Search Leads', and an 'Add to Campaign' button. Below the header, there is a status bar indicating '2 Items selected • Sorted by Name • Filtered by Rating' and a search bar labeled 'Search this list...'. The main content area is divided into two sections: 'Filters' on the left and a list of leads on the right. The 'Filters' section includes a 'Name' search bar, a 'Rating' section with checkboxes for 'Hot', 'Warm', and 'Cold', an 'Owner' dropdown menu, and a 'Company' search bar. The list of leads has columns for 'Name', 'Rating', 'Owner', 'Email', and 'Company'. The leads are sorted by name, and the 'Norm May' lead is selected. At the bottom of the list, there is a message 'All records are loaded'.

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

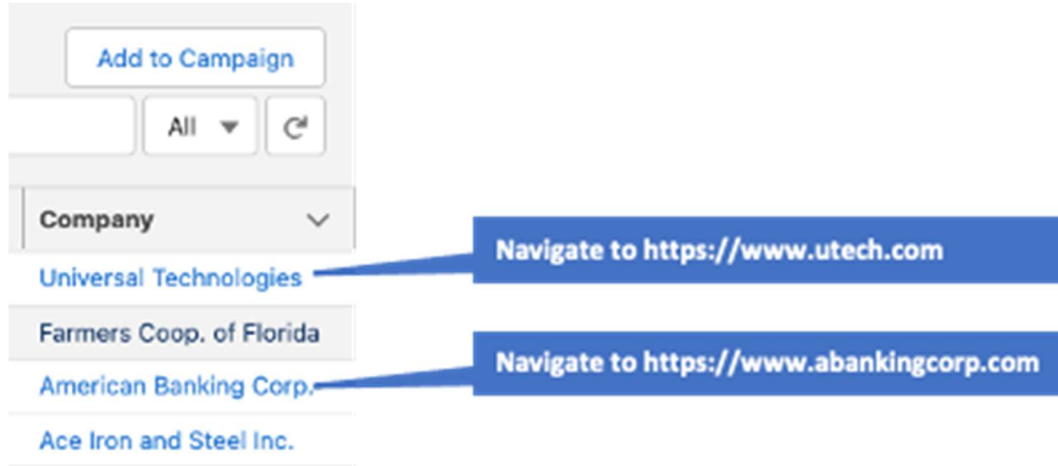
Value	Available when	Records passed to the flow
When Records are Selected	One or more records are selected in the list Example: close selected cases	Selected records
When Records are Loaded	Records are loaded in the list Example: add the contacts returned by a search to a campaign	Loaded records
Always	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 – Major Release

New Features

Lists can now be displayed as highly customizable tiles

The screenshot displays a 'Sample Leads: Tiles 2x2' interface. It features a grid of lead tiles, each containing contact information (Name, Owner, Email, Phone, Record Type) and a status badge (Warm, Hot, Cold). Callouts highlight key features: 'Customizable Title' points to the lead name, 'Badge with Dynamic Styling' points to the status badge, and 'Sortable Fields' points to the dropdown menu on the right. The interface also includes filters like 'Leads in Progress' and 'My Subordinates', and buttons for 'Assign Selected Leads to Me', 'Create Tasks for Selected Leads', and 'New'.

Better control on the record actions

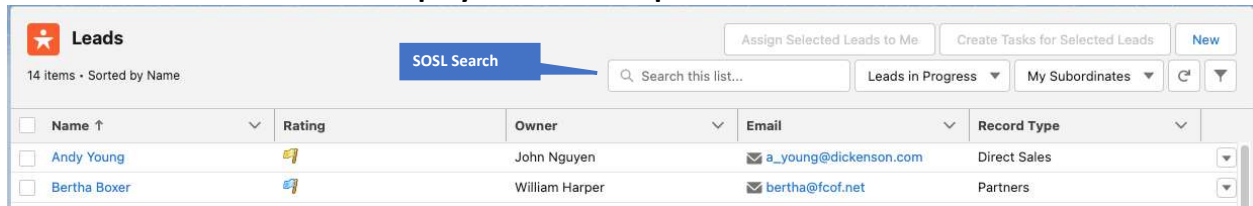
With Summer 23, it is now possible to enable individual record actions with these new settings on the list definition:

This panel allows users to enable or disable specific record actions. It includes checkboxes for 'Enable all Record Actions', 'Enable Edit Record Action', 'Enable New Record Action', and 'Enable Delete Record Action'. The 'Enable Edit Record Action' and 'Enable Delete Record Action' checkboxes are currently checked.

Improved Filters panel

The screenshot shows the 'Improved Filters panel' with various search and filter options. Callouts highlight specific features: 'Private, Probability (%), Stage are not searchable with this search box' points to the search box; 'The list of non searchable fields is now displayed' points to the list of fields; 'Clear button for each filter' points to the 'x' icon next to the search box; and 'Easier filtering on picklists with lots of values. The five first values are displayed in the panel. The other ones are selected in a dialog' points to the 'Stage' dialog. The 'Stage' dialog shows a list of available stages (Prospecting, Qualification, Value Proposition, Id. Decision Makers, Proposal/Price Quote, Closed Won) and a list of selected stages (Needs Analysis, Negotiation/Review, Perception Analysis). The 'Show More (2 selected)' link is also visible.

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 – 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 variations of the 'Quick Filters' dialog box, each with a close button (X) in the top right corner.

- Left Screenshot:** The 'Contact' search field contains 'jack'. Below it, a list of contacts is shown: 'Jack Rogers, VP, Facilities' and 'Jack Williams, Director, Maintenance'. The 'Owner' dropdown is set to 'Users'. A blue callout box points to the 'Users' dropdown with the text 'Search by Related Records'.
- Middle Screenshot:** The 'Record Type' section has 'Documentation Request' selected. The 'Owner' dropdown is set to 'Users'. A blue callout box points to the 'Record Type' section with the text 'Search by Record Type'.
- Right Screenshot:** The 'Record Type' section has 'Documentation Request' selected. The 'Owner' dropdown is set to 'Queues'. Below it, a list of queues is shown: 'Electrical - Tier 1', 'Electrical - Tier 2', and 'Electrical - Tier 3'. A blue callout box points to the 'Queues' list with the text 'Search by Record Owner'.

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 the 'Smart List' configuration screen. The 'API Name' is 'LeadsSmartList'. The 'Input Type for Selected Records parameter' is 'Lead'. The 'INTERNAL - Must be set to' field is set to '{!\$GlobalConstant.True}'. The 'List Definition Name' is 'SLHomeLeads'. The 'Minimum Row Selected' field is highlighted with an orange box and contains the value '1'. The 'Record ID' field is empty.

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 – 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 – Minor Release

New Feature

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

Winter 23 - 2.0 – 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' form. The 'Field' section contains the following fields:

- Smart List Definition: Sample Cases List
- Field Label: (empty)
- Display in List: ☒
- Display in Quick Filters: Yes if Filterable (highlighted with an orange box)
- Field Name: Status
- Display Position in List: 4
- Display Position in Quick Filters: 1 (highlighted with an orange box)

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' form. The 'Field' section contains the following fields:

- Smart List Definition: Sample Cases List
- Field Label: (empty)
- Display in List: ☒
- Display in Quick Filters: Yes if Filterable
- Display Type: String
- Sortable in List: No (highlighted with an orange box)

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. It has three tabs: 'Information', 'Field', and 'List Type'. The 'Field' tab is active. 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' (empty), '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 Map Lines* and *Wrap*

The image shows the 'Smart List Definition Edit' form. It has three tabs: 'Information', 'List Type', and 'Widget Parameters'. The 'Widget Parameters' tab is active. In this tab, the 'Wrap Text Max Lines' parameter is highlighted with an orange box and set to '3'. Other parameters include 'List Label' (Sample Cases List), 'Maximum Number of Records' (2,000), 'Show List Header' (checked), 'Selectable Rows' (checked), 'Display Quick Filters All the Time' (unchecked), and 'Show Row Number Column' (unchecked).

The image shows the 'Smart List Field Edit' form. It has three tabs: 'Information', 'Field', and 'List Type'. The 'Field' tab is active. In the 'Field' section, the 'Wrap Text' parameter is highlighted with an orange box and set to 'checked'. Other parameters include 'Smart List Definition' (Sample Cases List), 'Field Label' (empty), 'Display in List' (checked), 'Display in Quick Filters' (No), 'Display Type' (String), 'Sortable in List' (No), 'Column Width' (250), 'Field Name' (Description), 'Display Position in List' (2), 'Display Position in Quick Filters' (empty), 'Hyperlink to Detail Id Field' (empty), and 'Default Sort Field' (unchecked).

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 - Initial Release