

Stratus360

Static List Admin Guide

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Introduction

Group your Salesforce records into lists undisturbed by filters or field values with Stratus360's Static List.

The Static List holds and manages records in lists at the time the list was created. Keeping the record information dynamic, records in Static Lists stays unchanged until the users manually make adjustments to the list. Each Static List includes data tables of meaningful fields and exportable CSV tables, to make information extraction easy and fast.

The Static List Admin Guide provides the Static List setup process as well as assist in troubleshooting any problems the user might face.

Example Features:

- Creating a Static List that is not based on filters
- Categorizing records and fields using Static Lists
- Viewing all fields within Static Lists in one data table
- Grouping Static Lists across many objects
- Designing hierarchy systems with a Static List of Static Lists

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Getting Started

Let's get familiar with the Static List Manage Package.

The Static List manage package includes:

- **Pre-installed List Types with Static List buttons**, which are:
 - List
 - Account
 - Contact
 - Leads
 - Opportunities.
- **List Object** for the individual user to manage their [Static Lists](#).
- **List Items Object** for administrators to manage records that are created into a [List Item](#) by the user.
- **List Configuration Tab** to manage [List Types](#).

Admin Setup

The [Static List](#) requires the administrator to complete a setup processes before users can access [Static Lists](#) on objects.

List Type Setup

- [Creating New List Types in the List Configuration](#)
- [Setting up a Static List Button on an Object List View](#)
- [Removing Static List Buttons](#)
- [Deleting a List Type](#)

List Type Setup

For users to use the Static List functionality on an object that is not a [List Type](#), the administrator is required to complete a List Type Setup by creating **List Types** and installing **Static List buttons** on object [List Views](#).

List Types

List Types are objects that are conditioned by the administrator to create and contain [Static Lists](#). List Types are stored in the List Configuration tab. The administrator can add/remove [List Types](#), view [List Types](#), and see the number of [Static Lists](#) created in a [List Type](#) in the List Configuration tab.

Static List Buttons

The [Static List Buttons](#) gives the users access to the Static List function on Object [List Views](#). These buttons are “**Add to Lists**” and “**Show Static Lists**”.

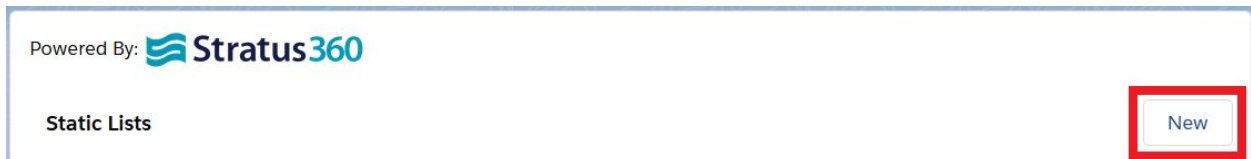
In this section, we will go through:

- [Creating New List Types in the List Configuration](#)
- [Setting up a Static List Button on an Object List View](#)
- [Removing Static List Buttons](#)
- [Deleting a List Type](#)

Creating New List Types in the List Configuration

Creating new List Types starts in the List Configuration tab. The List Configuration is a pre-installed tab for the administrator to manage [List Types](#). For the following steps, we will create an **“Account”** List Type in List Configuration as an example.

1. Click the **“New”** button on the **List Configuration** tab.



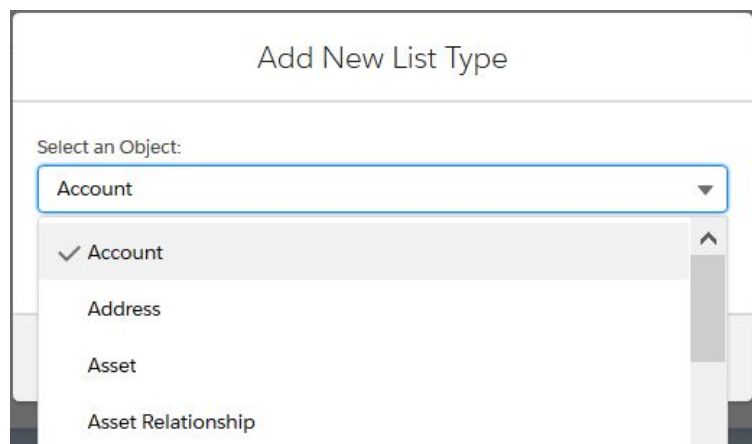
2. Select an object in the **“Select an Object”** picklist.



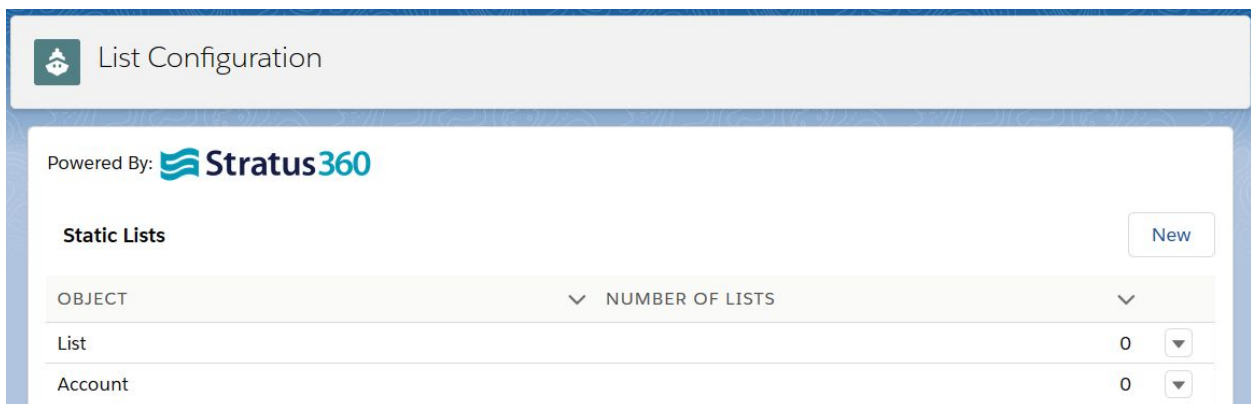
What Objects can be made into a List Type?

- Can be created by the current user
- Not a custom setting
- Searchable
- Accessible to the user

Also includes **“Campaign Member”** and **“Account Contact Relation”**.



3. Click the **“Save”** button. The object will appear in the data table saved as a [List Type](#).



Setting up a Static List Button on an Object List View

The [Static List](#) button setup displays the button on the object and allows users to access the Static List functionality in the [list view](#). The administrator must ensure all the list types have [Static List Buttons](#) for the [Static List](#) to function.

1. Access the “**Object Manager**” through Setup.
2. Select the object you have created in the List Configuration.

LABEL	API NAME	DESCRIPTION	LAST MODIFIED	DEPLOYED	CUSTOM
Account	Account				

3. Edit the “**List View**” from “**Search layout**”.

Details	Search Layouts 6 Items, Sorted by Layout			Quick Find
Fields & Relationships	LAYOUT	COLUMNS DISPLAYED	BUTTONS DISPLAYED	
Page Layouts	List View	N/A	New, Open in Quip, Clean, Get More Accounts, Discover Companies, Add to Call List	▼
Lightning Record Pages	Lookup Dialogs	Account Name, Account Site, Account Owner Alias, Type	N/A	▼
Buttons, Links, and Actions	Lookup Phone Dialogs	Account Name, Account Site, Account Owner Alias, Type, Phone	N/A	▼
Compact Layouts	Search Filter Fields	N/A	N/A	▼
Field Sets	Search Results	Account Name, Account Site, Phone, Account Owner Alias	N/A	▼
Object Limits	Tab	Account Name, Billing City, Phone	N/A	▼
Record Types				
Related Lookup Filters				
Search Layouts				

4. Under custom buttons, add “**Add to List**” and “**Show Static Lists**” to the “**Selected Buttons**” list.

Custom Buttons

Available Buttons

--None--

Up

Down

Selected Buttons

Add To Lists

Show Static Lists

Up

Down

Add

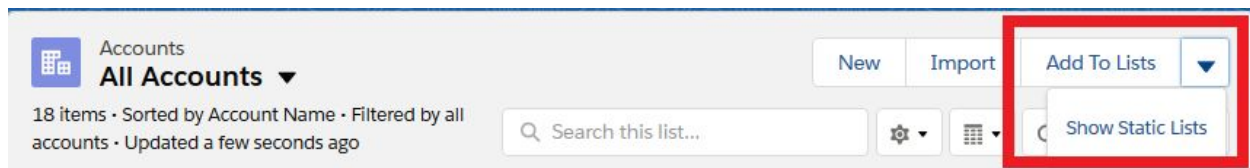
Remove

Setting up a Static List Button on an Object List View

5. Click the “**Save**” button.

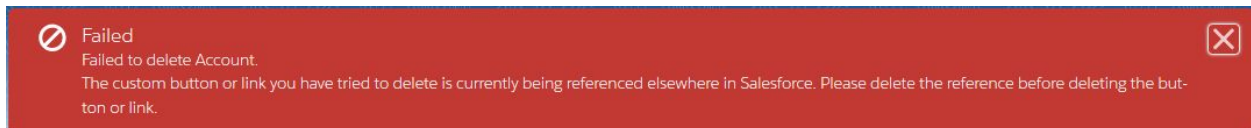


If all steps are done correctly, the “Add to List” and “Show Static Lists” buttons should appear on the selected object List View.



Removing Static List Buttons

A failed toast will appear when the administrator tries to delete a list type that contains [Static List buttons](#). Be sure to remove the [Static List buttons](#) from the object [list view](#) to delete successfully.



1. Access the “**Object Manager**” through Setup.
2. Select the object you have created in the List Configuration.

LABEL	API NAME	DESCRIPTION	LAST MODIFIED	DEPLOYED	CUSTOM
Account	Account				

3. Edit the “**List View**” from “**Search layout**”.

Details	Search Layouts 6 Items, Sorted by Layout			Quick Find
Fields & Relationships	LAYOUT	COLUMNS DISPLAYED	BUTTONS DISPLAYED	
Page Layouts	List View	N/A	New, Open in Quip, Clean, Get More Accounts, Discover Companies, Add to Call List	
Lightning Record Pages	Lookup Dialogs	Account Name, Account Site, Account Owner Alias, Type	N/A	Edit
Buttons, Links, and Actions	Lookup Phone Dialogs	Account Name, Account Site, Account Owner Alias, Type, Phone	N/A	
Compact Layouts	Search Filter Fields	N/A	N/A	
Field Sets	Search Results	Account Name, Account Site, Phone, Account Owner Alias	N/A	
Object Limits	Tab	Account Name, Billing City, Phone	N/A	
Record Types				
Related Lookup Filters				
Search Layouts				

Removing Static List Buttons

- Under custom buttons, move **"Add to List"** and **"Show Static Lists"** to the **"Available Buttons"** list.



The screenshot shows a configuration window titled "Custom Buttons". It is divided into two main sections: "Available Buttons" on the left and "Selected Buttons" on the right. In the "Available Buttons" list, the items "Add To Lists" and "Show Static Lists" are highlighted. In the "Selected Buttons" list, the text "--None--" is displayed. Between the two lists are two buttons: "Add" (with a right-pointing arrow) and "Remove" (with a left-pointing arrow). To the right of the "Selected Buttons" list are two more buttons: "Up" (with an upward-pointing arrow) and "Down" (with a downward-pointing arrow). Both lists have vertical scroll bars on their right sides.

- Click the **"Save"** button.



If all steps are done correctly, the **"Add to List"** and **"Show Static Lists"** buttons should disappear from the selected object List View. Any list created prior to deleting the list type will not be deleted.

Deleting a List Type

1. Remove [Static List buttons](#) from the [list type](#).

🔍 Reference the [“Removing Static List Buttons”](#) section for guided steps to removing Static List Buttons.

2. Click on  then click the **“Delete”** button from the List Configuration object.

Static Lists

OBJECT	NUMBER OF LISTS	
List	0	
Account	0	

Delete

Troubleshooting

The [List object data table](#) should not be modified as errors are bound to happen.

* List Name
Holiday Gifting Group of 2018

Owner
Stratus360

*SObject
Account

Fields
Name,Phone,BillingCity,BillingCountry,
BillingState,BillingPostalCode

Object
Account

Number Of Items
4



Error 1: Failed to get Data. Data has been corrupted, 1 invalid item(s) found. Consult to User Guide.

Reason: A [List Item](#) is referring to a different Object ID than the current [Static List](#) Object ID. If the SObject and the object of the [List Items](#) do not match, the server is unable to find the List Item in the Static List.

Solution: Go to the **List Items Tab** to delete the [List Item](#) that has the error.



Error 2: Failed to get Object. Data has been corrupted, 'xxx' does not exist. Consult to User Guide.

Reason: The **SObject** the list is referring to does not exist. This happens when the user directly modifies the SObject of the list.

Solution: Edit the list for the object to link to the original object.

Troubleshooting



Error 3: Failed to get Fields. Data has been corrupted, 'xxx' is not a field of a certain object. Consult to User Guide.

Reason: The **Fields** section of the list contains a non-existent field. This happens when the user modifies the Fields of the [Static List](#).

Solution: Delete the fields that are referenced in the error message.

Glossary

D

Data Table¹ - An HTML table that's defined by iterating over a set of data, displaying information about one item of data per row. The body of the data table contains one or more column components that specify what information should be displayed for each item of data. The data set can include up to 1,000 items, or 10,000 items when the page is executed in read-only mode.

L

List Configuration Object - is a pre-installed object for the administrator to manage List Types. The administrator can add/remove List Types, view List Types, and see the number of Static Lists created in a List Type in the List Configuration object.

List Item - an item that is linked to a record of an object in a static list.

List Item Object - an object for administrators to manage records that are created into a List Item by the user.

List of Lists - the abbreviated term of Static List of Static Lists. It is a Static List that possesses multiple Static Lists.

List Object - an object for the individual user to manage their Static Lists and List of Lists.

List Type - are objects that are conditioned by the administrator to create and contain Static Lists.

List View² - A list display of items (for example, accounts or contacts) based on specific criteria. Salesforce provides some predefined views.

In the Agent console, the list view is the top frame that displays a list view of records based on specific criteria. The list views you can select to display in the console are the same list views defined on the tabs of other objects. You cannot create a list view within the console.

¹ Definition according to the [Visualforce Developer Guide](#)

² Definition according to the [Salesforce Glossary](#)

Glossary

S

Static List – a fixed list of records on an object.

Static List Buttons -- are the two buttons "Add to List" and "Show Static List" that allows the users to create and see their Static Lists.

Static List of Static Lists - is a Static List that contains many Static Lists.

Acknowledgements

[Great Web Icons](#) created by Freepik.