

Stratus360

Static List User Guide

Version 1.3, Spring '19

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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 onto records in lists from the time the Static 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 User Guide provides a Quick Start with the Static list as well as help users familiarize with its function. This guide also assists in troubleshooting any problems the user might face.

Features:

- Creating a list of records that are 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

For questions and support, contact us at:

info@stratus360.com
(866) 652-5818

Before you get Started

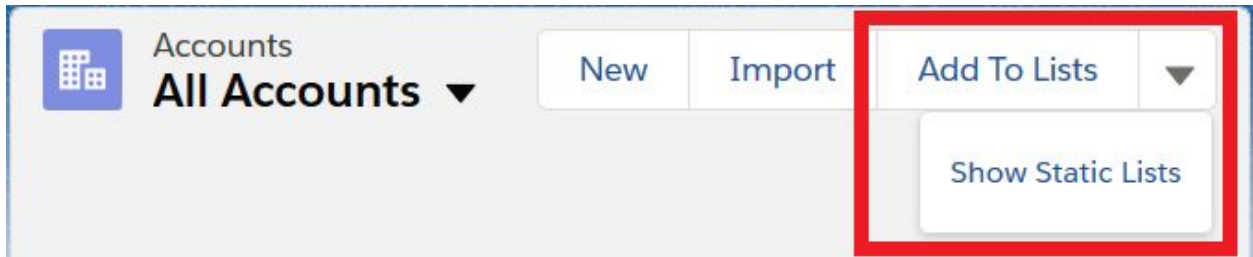
Learn about the two essential components that requires your special attention:

- [The Static List Buttons](#)
- [List Details Page](#)

Let's delve into the [Static List](#) basics before we get started.

Static List Buttons

The [Static List Buttons](#) are “**Add to Lists**” and “**Show Static Lists**”. These buttons are available on the upper right corner of object [list views](#) for users to perform [Static List](#) actions. Note that these [Static List Buttons](#) are visible on all [list views](#) except for “**Recently Viewed**”.



Add to List

This button allows the user to create a [Static List](#) or add records to a [Static List](#). Users will be directed to either “**Create New List**” or “**Add to List**” according to different conditions:

❖ **Create New List**

- No pre-existing list in the selected object; or
- No records were selected

❖ **Add to List**

- There are pre-existing Static Lists and records are selected.

Show Static Lists

This button allows the user to view the [Static Lists](#) within an object or show all [Static Lists](#) that contain one or more selected records. In the [List object](#), this button shows all the [List of Lists](#) or show all [List of Lists](#) that contain one or more selected [Static Lists](#).

List Details Page

The [List Details Page](#) presents all information such as records and fields regarding a certain [Static List](#).

VIEW	ACCO...	↑	ACCOUN...	↓	CUSTOM...	↓	BILLING ...	↓	BILLING ...	↓	BILLING ...	↓	BILLING ...	↓
<input type="checkbox"/>	Details	Adam Smith...	001f200001...	High	Toronto	Ontario	Canada	123 Adam S...	123456					
<input type="checkbox"/>	Details	Mary Jane F...	001f200001...	High	New York City	New York	Canada	234 Mary Ja...	234567					
<input type="checkbox"/>	Details	Thomas Bro...	001f200001...	Medium	London	Ontario	Canada	345 Thomas...	345678					
<input type="checkbox"/>	Details	University of...	001f200001...	Medium	Tucson	AZ	USA	888 N Unive... Tucson, AZ 4... United States	45678					

“Change Owner” and “Delete” at the top right corner of the page are Salesforce **Page Layout Actions**¹.

Action Bar

The Action Bar consists of buttons to create actions related to the [Static List data table](#).

Edit Fields This allows the user to add, remove and order the displayed fields on the data table.

Add Items This allows the user to add new items to the list.

Export Data This converts the List Item data table into a downloadable CSV file.

¹ **Change Owner:** The user can change the owner of the current Static List.

Delete: This deletes the Static List you are currently on.

Selection Bar

The Selection Bar contains a button that requires the user to select records in the [List Item data table](#).

Remove This allows the user to remove any selected items in the data table from the Static List.

List Item Data Table

The [List Item data table](#) displays Salesforce records and fields within a [Static List](#).

Details This allows the user to navigate to the record details page of the respective row.



The Details button is unavailable if the record referenced by a [List Item](#) is not found because the server is unable to find the record that is referenced by the [List Item](#).

Powered By: 

<input type="checkbox"/>	Edit Fields	Add Items	Export Data	Custom Button	Remove
<input type="checkbox"/>	VIEW	ACCOUNT NAME ↑	ACCOUNT PHONE	ACCOUNT NUMBER	ACCOUNT TYPE
<input type="checkbox"/>	Details	Dickenson plc	(785) 241-6200	CC634267	Customer - Channel

Lookup Fields Any lookup field contains a link that redirects the user to the details page of the lookup.

Static List Quick Start

Learn how to use the [Static List](#) after the administrator setup process is complete. We will use the “**Account**” object as an example in the following processes.


This Quick Start section discusses:

- [Creating a New Static List](#)
- [Finding your New List](#)
- [Editing Fields in a Static List](#)
- [Adding Items to a Static List](#)
- [Removing Items from a Static List](#)
- [Deleting a Static List](#)

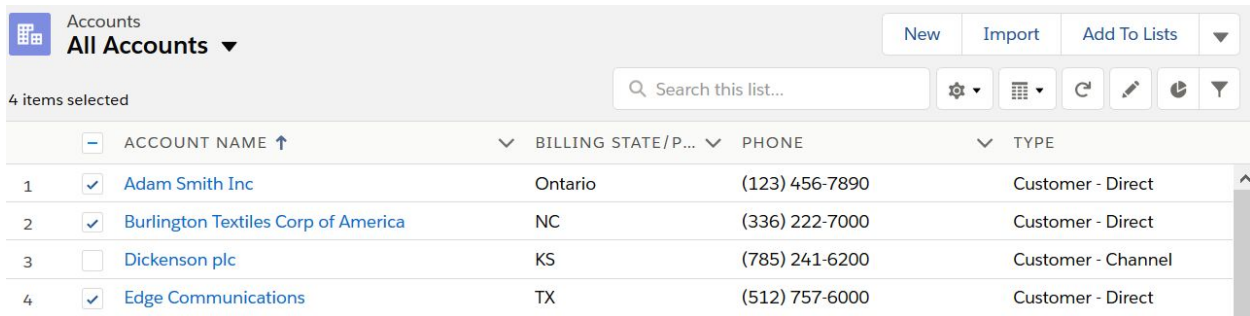
Creating a New Static List

1. Go to an [object](#) after the administrator completed the [List Type](#) setup.

2. Visit any [list view](#) of the selected object.

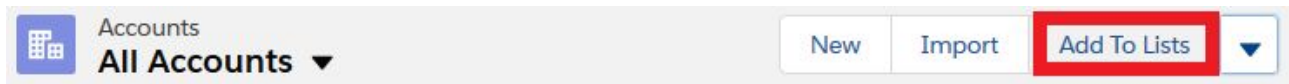
 The “Add to List” and “Show Static List” buttons appear on all List Views except for “Recently Viewed”.

3. Select records in the [list view](#).



	ACCOUNT NAME ↑	BILLING STATE/P...	PHONE	TYPE
1	<input checked="" type="checkbox"/> Adam Smith Inc	Ontario	(123) 456-7890	Customer - Direct
2	<input checked="" type="checkbox"/> Burlington Textiles Corp of America	NC	(336) 222-7000	Customer - Direct
3	<input type="checkbox"/> Dickenson plc	KS	(785) 241-6200	Customer - Channel
4	<input checked="" type="checkbox"/> Edge Communications	TX	(512) 757-6000	Customer - Direct

4. Click on the “Add to Lists” button.



Creating a New Static List

5. In “Create New List”, enter the “List Name” and select fields to display in your Static List.

Create New List | Add To List

* List Name
Holiday Gifting Group of 2018

* Select fields to display

Available

- Account Description
- Account Fax
- Account ID
- Account Number
- Account Rating
- Account Site
- Account Source

Selected

- Account Name
- Account Phone
- Billing Address
- Billing City
- Billing State/Province
- Billing Country

Selected Items:

- Account Name
Burlington Textiles Corp of America
- Account Name
Edge Communications
- Account Name
Adam Smith Inc

Create New List | Create & New | Cancel

Powered By: Stratus360

6. Click the “Create New List” button. A pop-up with a success message will appear if the creation was successful on the page you just created.

List: **Holiday Gifting Group of 2018**

Success
Created Holiday Gifting Group of 2018 with 3 items.

Change Owner | Delete

Object: Account | Owner: Stratus360 | Number Of Items: 3

Powered By: Stratus360


Edit Fields | Add Items | Export Data | Remove

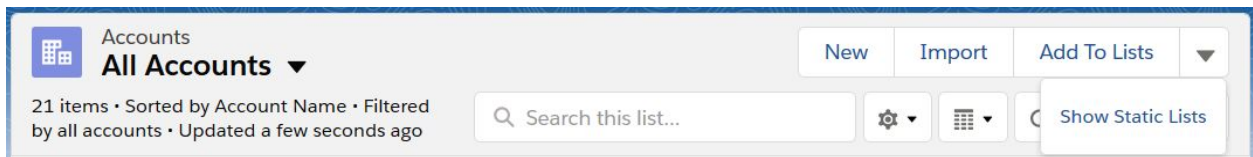
VIEW	ACCOUNT ...	ACCOUNT P...	BILLING CITY	BILLING STA...	BILLING CO...
<input type="checkbox"/> Details	Adam Smith Inc	(123) 456-7890	Toronto	Ontario	Canada
<input type="checkbox"/> Details	Burlington Textil...	(336) 222-7000	Burlington	NC	USA
<input type="checkbox"/> Details	Edge Communic...	(512) 757-6000	Austin	TX	USA

Finding your New List

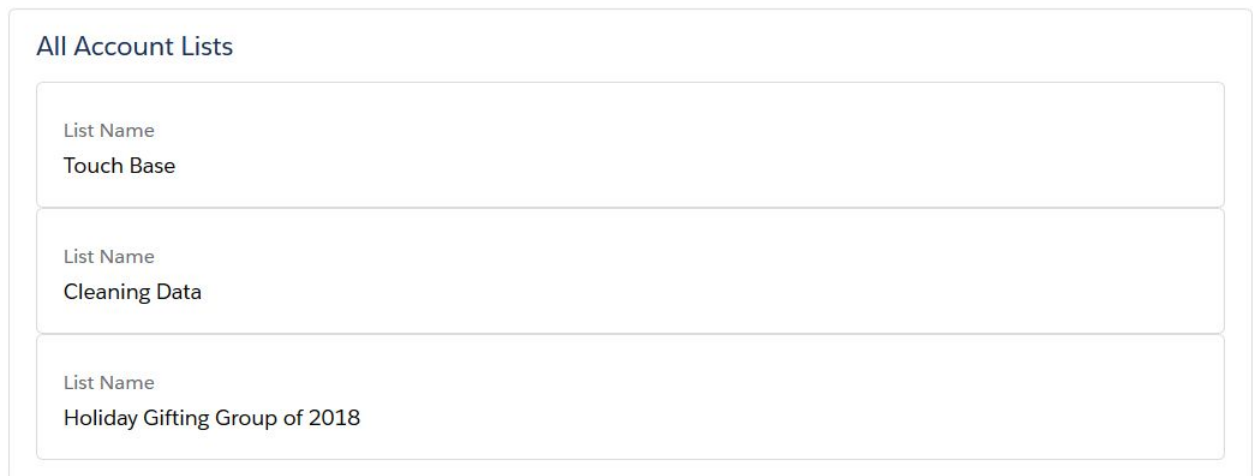
1. Go to the [object](#) that contains your new [Static List](#).

2. Click “Show Static Lists”.

 The “Add to List” and “Show Static List” buttons appear on all List Views except for “Recently Viewed”.



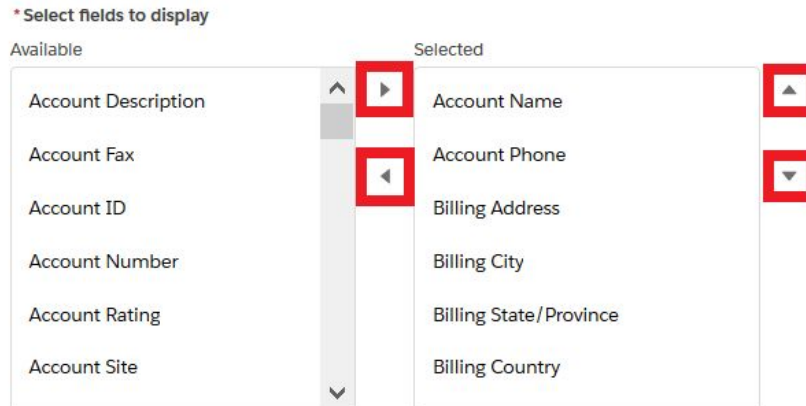
3. All [Static Lists](#) of that [object](#) will be displayed.



Editing Fields in a Static List

1. Click the “**Edit Fields**” () button in the [List Details Page](#).

2. Select a field and click the arrow buttons to arrange the field to the preferred side and order.

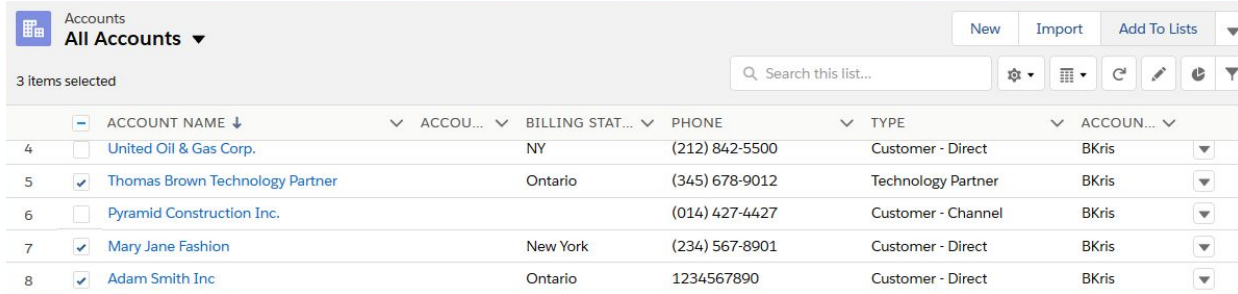


- ▶ This button adds the selection to the [Static List](#).
- ◀ This button removes the selection from the [Static List](#).
- ▲ This button moves the selected field to the left of the [List Details Page](#) data table
- ▼ This button moves the selected field to the right of the [List Details Page](#) data table .

3. Click the “**Save**” button.

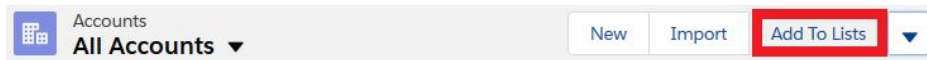
Adding Items to a Static List

1. Select the records you would like to create a [Static List](#).




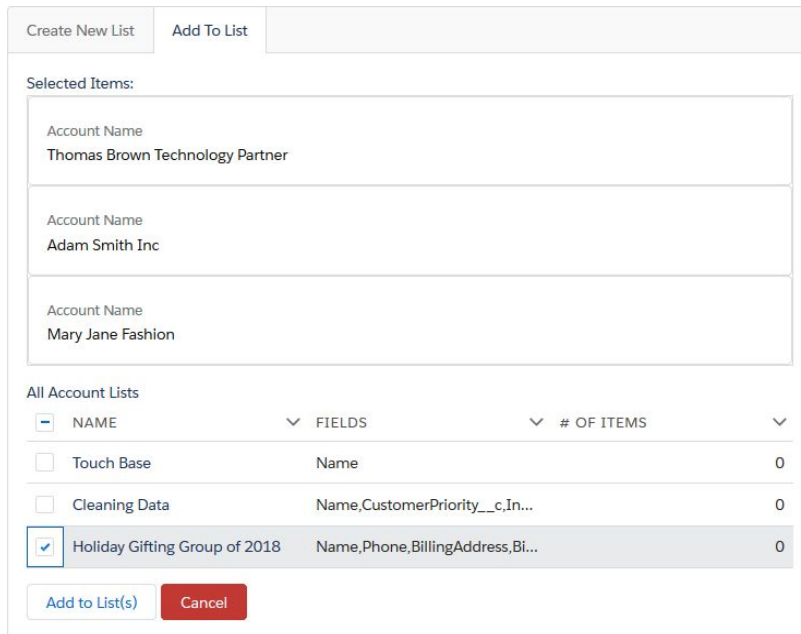
	ACCOUNT NAME ↓	ACCOU... ↓	BILLING STAT... ↓	PHONE	TYPE	ACCOUN... ↓
4	<input type="checkbox"/>	United Oil & Gas Corp.	NY	(212) 842-5500	Customer - Direct	BKris
5	<input checked="" type="checkbox"/>	Thomas Brown Technology Partner	Ontario	(345) 678-9012	Technology Partner	BKris
6	<input type="checkbox"/>	Pyramid Construction Inc.		(014) 427-4427	Customer - Channel	BKris
7	<input checked="" type="checkbox"/>	Mary Jane Fashion	New York	(234) 567-8901	Customer - Direct	BKris
8	<input checked="" type="checkbox"/>	Adam Smith Inc	Ontario	1234567890	Customer - Direct	BKris

2. Click the “**Add to Lists**” button.



3. Select the preferred [Static List](#) and click “**Add to List(s)**”

 **You can add the selected items to multiple Static Lists at once.**



Create New List | Add To List

Selected Items:

- Account Name
Thomas Brown Technology Partner
- Account Name
Adam Smith Inc
- Account Name
Mary Jane Fashion

All Account Lists


NAME	FIELDS	# OF ITEMS
<input type="checkbox"/> Touch Base	Name	0
<input type="checkbox"/> Cleaning Data	Name, CustomerPriority__c, In...	0
<input checked="" type="checkbox"/> Holiday Gifting Group of 2018	Name, Phone, BillingAddress, Bi...	0

Add to List(s) | Cancel

Removing Items from a Static List

 **Items removed from the Static List will not delete the object record.**

1. Click on the **“Show Static Lists”** button.

 The **“Add to List”** and **“Show Static List”** buttons appear on all List Views except for **“Recently Viewed”**.

2. Select the **Static List** of the item you wish to remove.

3. Select the item and click **“Remove”**.

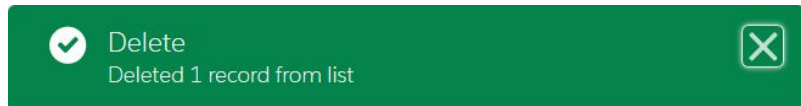
Edit Fields		Add Items		Remove			
VIEW	ACCOUNT NAME	ACCOUNT P...	BILLING STR...	BILLING CITY	BILLING STA...	BILLING CO...	
<input type="checkbox"/>	Details	Adam Smith Inc	(123) 456-7890	123 Adam Smith	Toronto	Ontario	Canada
<input type="checkbox"/>	Details	Mary Jane Fashion	(234) 567-8901	234 Mary Jane S...	New York City	New York	Canada
<input type="checkbox"/>	Details	Thomas Brown Techn...	(345) 678-9012	345 Thomas Bro...	London	Ontario	Canada
<input checked="" type="checkbox"/>	Details	University of Miracles	(456)789-0123	888 N University... Tucson, AZ 45678 United States	Tucson	AZ	USA

4. A **warning message** will appear. Click the **“Remove”** button.

Remove Items

Are you sure you want to remove these items?

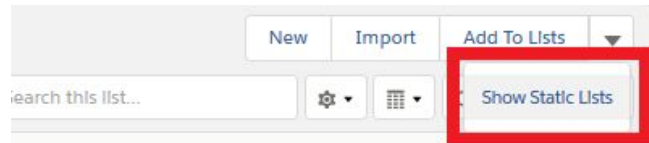
A pop-up with a success message will appear if the removal was successful.



Deleting a Static List

⚠ WARNING: A deleted Static List is not recoverable.

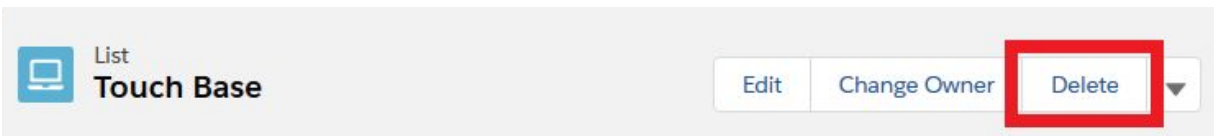
1. Click on the “**Show Static Lists**” button.



2. Select the [Static List](#) you wish to remove.

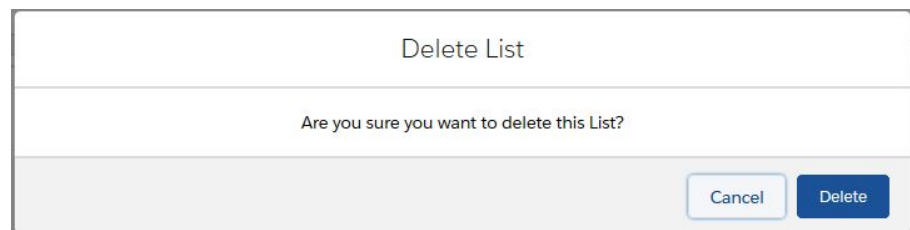


3. Click the “**Delete**” button.



Object	Owner	Number Of Items
Account	 Stratus360	0

4. A [warning message](#) will appear. Click the “**Delete**” button.



A pop-up with a success message will appear if the deletion was successful.



Advanced Static List

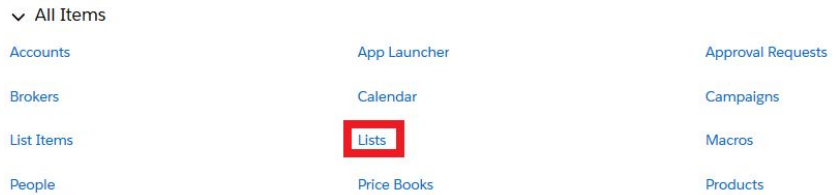
The Advanced Static List Section shows higher level [Static List](#) uses. This section contains:

- [List Object List View](#)
- [Adding Items to a Static List in the List Details Page](#)
- [Showing All Statics Lists that Contain a Specific Record](#)
- [Creating a Static List of Static Lists](#)
- [Showing All Static List of Static Lists](#)
- [Exporting Static Lists into a CSV File](#)

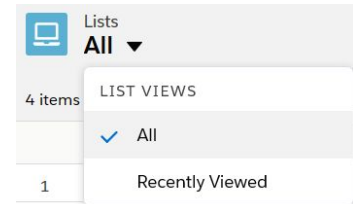
List Object List View

The [List object](#) is a pre-installed object that helps users manage all their [Static Lists](#) created across different objects within the [list view](#).

1. Click on the “**List**” object from the App Launcher



2. Select a [list view](#) other than “**Recently Viewed**”.



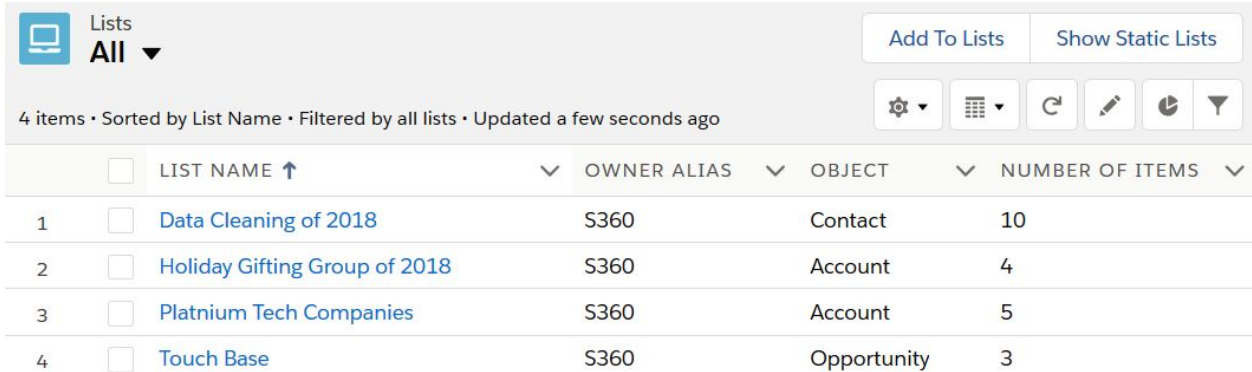
3. All Static Lists created will be listed in the List [List View](#).

	<input type="checkbox"/>	LIST NAME ↑	OWNER ALIAS	OBJECT	NUMBER OF ITEMS
1	<input type="checkbox"/>	Data Cleaning of 2018	S360	Contact	10
2	<input type="checkbox"/>	Holiday Gifting Group of 2018	S360	Account	4
3	<input type="checkbox"/>	Platnium Tech Companies	S360	Account	5
4	<input type="checkbox"/>	Touch Base	S360	Opportunity	3

To check [Static Lists of Static Lists](#) (in short, [Lists of Lists](#)), click the “**Show Static Lists**”.

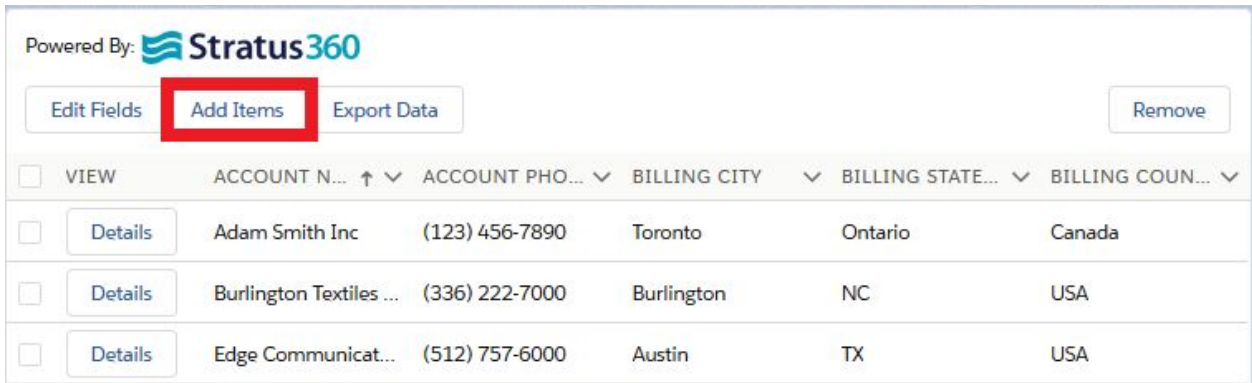
Adding Items to a Static List in the List Details Page

1. Select a **Static List** from the **List object** to open the **List Details page**.



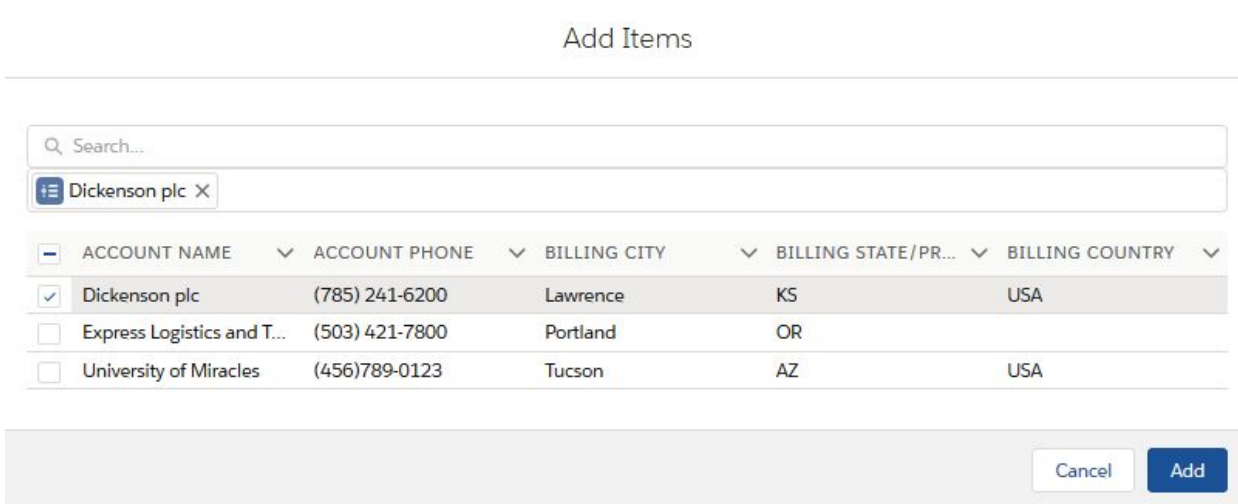
	<input type="checkbox"/>	LIST NAME ↑	OWNER ALIAS	OBJECT	NUMBER OF ITEMS
1	<input type="checkbox"/>	Data Cleaning of 2018	S360	Contact	10
2	<input type="checkbox"/>	Holiday Gifting Group of 2018	S360	Account	4
3	<input type="checkbox"/>	Platnium Tech Companies	S360	Account	5
4	<input type="checkbox"/>	Touch Base	S360	Opportunity	3

2. Click on the **“Add Items”** button.



<input type="checkbox"/>	VIEW	ACCOUNT N...	ACCOUNT PHO...	BILLING CITY	BILLING STATE...	BILLING COUN...
<input type="checkbox"/>	Details	Adam Smith Inc	(123) 456-7890	Toronto	Ontario	Canada
<input type="checkbox"/>	Details	Burlington Textiles ...	(336) 222-7000	Burlington	NC	USA
<input type="checkbox"/>	Details	Edge Communicat...	(512) 757-6000	Austin	TX	USA

3. Select the record(s) and click the **“Add”** button.




Search...

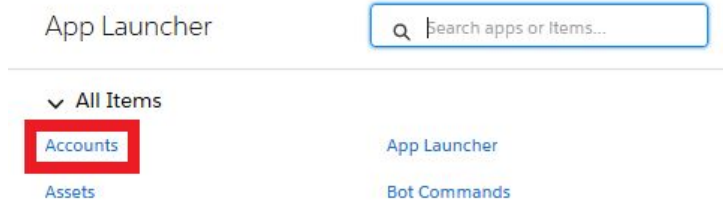
Dickenson plc X

<input type="checkbox"/>	ACCOUNT NAME	ACCOUNT PHONE	BILLING CITY	BILLING STATE/PR...	BILLING COUNTRY
<input checked="" type="checkbox"/>	Dickenson plc	(785) 241-6200	Lawrence	KS	USA
<input type="checkbox"/>	Express Logistics and T...	(503) 421-7800	Portland	OR	
<input type="checkbox"/>	University of Miracles	(456)789-0123	Tucson	AZ	USA

Cancel Add

Showing All Statics Lists that Contain a Specific Record

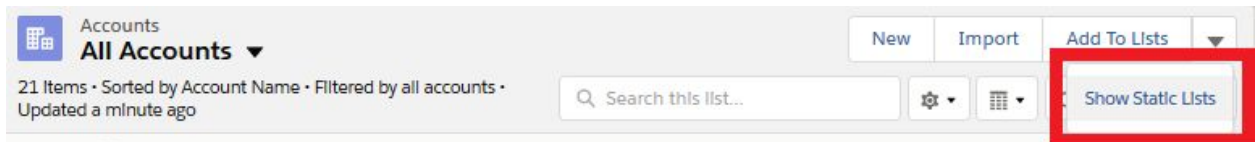
1. Click on the object from the App Launcher .



2. Select a record(s) from a [list view](#) other than “Recently Viewed”.

	ACCOUNT NAME ↓	A...	BILLIN...	PHONE	TYPE	AC...
1	<input type="checkbox"/> University of Miracles		AZ	(456)789-0123	Customer - Direct	BK...
2	<input type="checkbox"/> United Oil & Gas, UK		UK	+44 191 4956203	Customer - Direct	BK...
3	<input type="checkbox"/> United Oil & Gas, Singapo...		Singapore	(650) 450-8810	Customer - Direct	BK...
4	<input type="checkbox"/> United Oil & Gas Corp.		NY	(212) 842-5500	Customer - Direct	BK...
5	<input checked="" type="checkbox"/> Thomas Brown Technolo...		Ontario	(345) 678-9012	Technology Partner	BK...

3. Click “Show Static Lists”.



This will only show the [Static Lists](#) that contains the selected records.

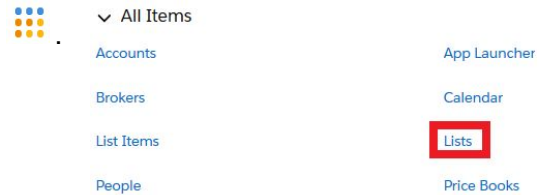
Showing 1 records:

List Name	Fields	Number Of Items
Cleaning Data	Name,Id,BillingCity,BillingCountry,BillingStreet,BillingState,BillingPostalCode	4
Holiday Gifting Group of 2018	Name,Id,CustomerPriority__c,BillingCity,BillingState,BillingCountry,BillingStreet,BillingPostalCode	4
2018 Platinum Technology Companies	Name,Description,Rating,AnnualRevenue,CustomerPriority__c	1

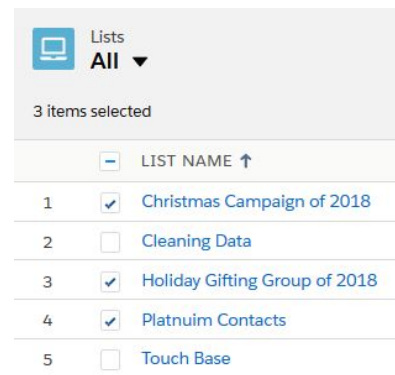
Creating a Static List of Static Lists

This function allows users to create a [Static List of Static Lists](#) (which will be referred to “List of Lists”); it is useful to create a hierarchical system. [Static Lists](#) from any object can be grouped together under the same [List of Lists](#).


1. Click on the “**List**” object from the App Launcher

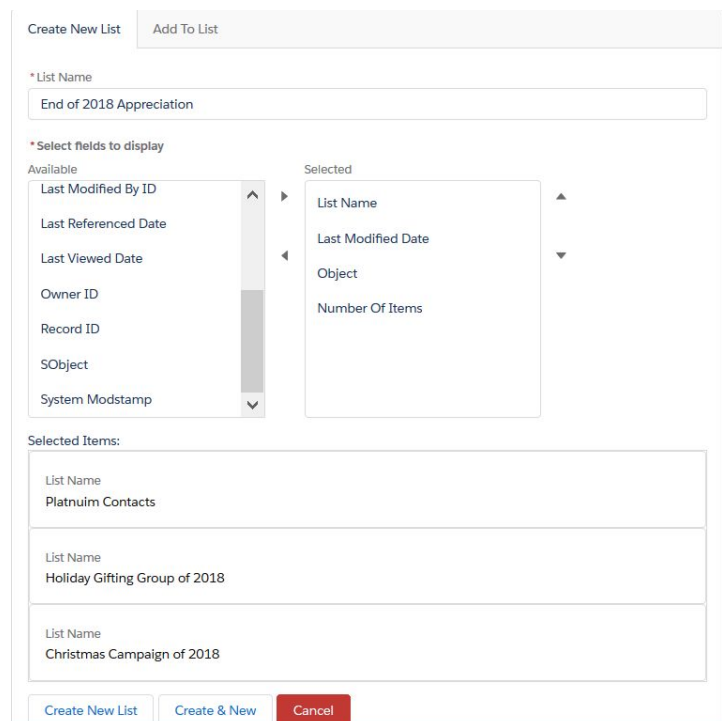


2. Click the “**Add to Lists**” button after selecting the [Static Lists](#) from a [list view](#) that is not “**Recently Viewed**”.



3. Enter the “**List Name**” and select the fields to display.

 **If you have made List of Lists on the same object in the past, the “Add to List” will take you to the default page “Add to List” instead of “Create New List”.**



Creating a Static List of Static Lists

4. Click the “**Create New List**” button. A pop-up success message will appear if the action is successful.

The screenshot shows a software interface with a success message at the top. The message is a green box with a white checkmark and the text: "Success Created End of 2018 Appreciation with 3 items." Below the message is a table with the following data:

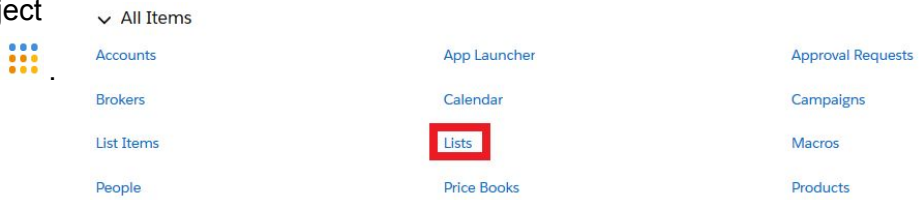
Object	Owner	Number Of Items
List	Stratus360	3

Below the table are buttons for "Edit Fields", "Add Items", and "Remove". Below the buttons is a table with the following data:

<input type="checkbox"/>	VIEW	LIST NAME ↑	LAST MODIFIED DATE	OBJECT	NUMBER OF ITEMS
<input type="checkbox"/>	Details	Christmas Campaign of 2018	5-Dec.-2018	Campaigns	5
<input type="checkbox"/>	Details	Holiday Gifting Group of 2018	5-Dec.-2018	Account	4
<input type="checkbox"/>	Details	Platnuim Contacts	5-Dec.-2018	Contacts	3

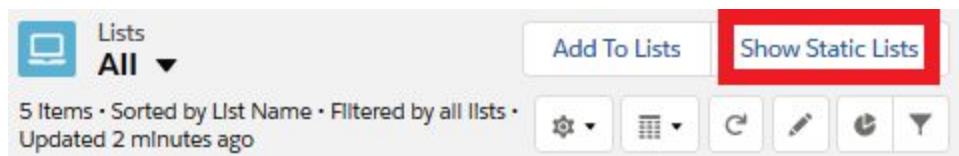
Showing All Static List of Static Lists

1. Click on the “List” object from the App Launcher




2. Select a list view other than “Recently Viewed”.

3. Click the “Show Static Lists” button.



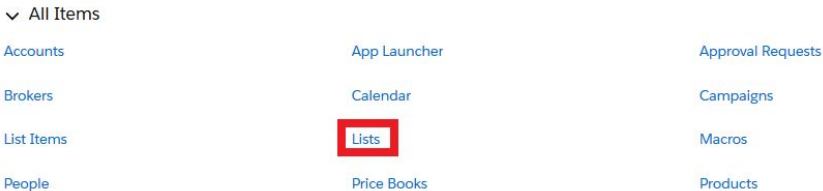
All Static Lists created will be displayed under “All List Lists”.

All List Lists
Powered By: 

List Name	Fields	Number Of Items
Holiday Campaign	Name, CreatedDate, LastModifiedDate	2
End of 2018 Appreciation	Name, S360_List__SObject__c, S360_List__Number_Of_Items__c, LastViewedDate	3

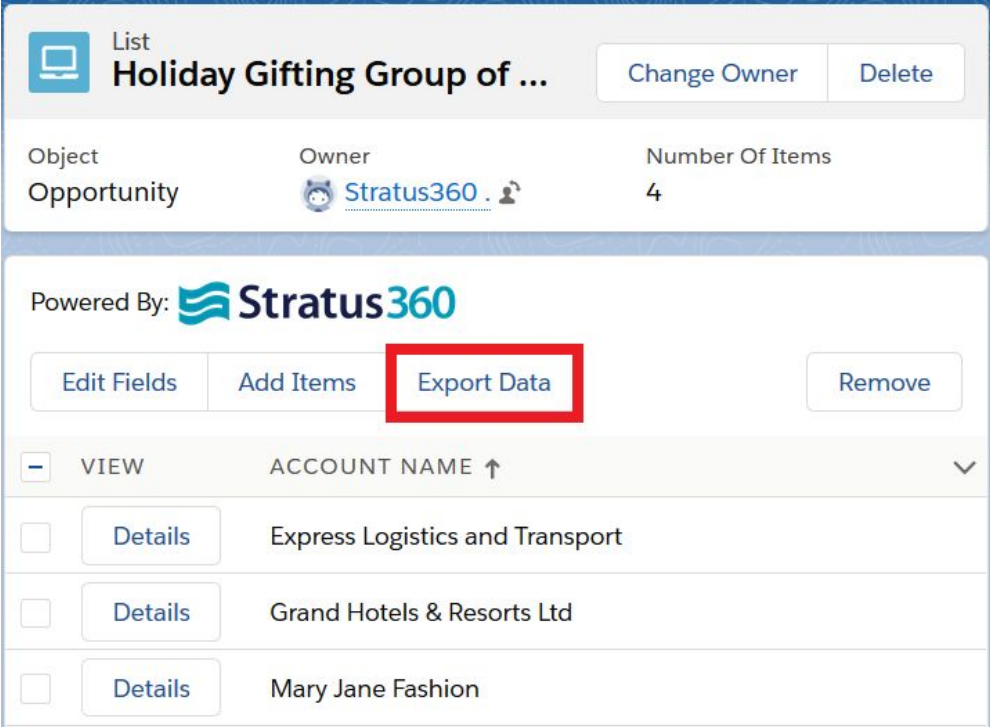
Exporting Static Lists into a CSV File

1. Click on the “List” object from the App Launcher



2. On the List list view, select the Static List you wish to export.

3. Click the “Export Data” button.



The “Export Data” button only downloads the information visible on the data table. The Static List data table will be downloaded into an Excel CSV file listing the account name and fields.

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 Guid

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 Table² - 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.

F

Field³ - is a part of an object that holds a specific piece of information, such as a text or currency value.

L

List Details Page - a Detail page for the List object.

Detail⁴ - A page that displays information about a single object record. The detail page of a record allows users to view the information, whereas the edit page allows you to modify it.

List View⁵ - 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 users 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.

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

List Items Data Table - is a data table that contains records of list items.

List of Lists - an 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.

² Definition according to the [Datatable Definition from Visualforce Developer Guide](#)

³ Definition according to the [Salesforce Style Guide](#)

⁴ Definition according to the [Salesforce Glossary](#)

⁵ Definition according to the [Salesforce Glossary](#)

Glossary

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

O

Object - allows users to store information in their Salesforce organization. The object is the overall definition of the type of information you are storing.

S

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

Static List Buttons -- the static list buttons include "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.

W

Warning Message - a notification that alerts users the reason for an error or a precautionary tip.

Acknowledgements

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