

Create and Change Views for Lists and Smart List

A smart list displays a default set of columns. Did you know you could edit those columns to your heart's content? Here's how.

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Create a View

1. Go to a list or smart list, click the **People** tab, and click **Create View** under the **View** drop-down.

Marketing Activities...

Marketing Activities

- Active Marketing Programs
- Learning
 - My Email Program - CT
 - My Nurture Program
 - My Program - CT
 - Auto Response Campaign
 - Auto Response Email
 - Change Score
 - My Email Alert
 - My Form Test
 - My Page
- Super Smart List**
- My Tradeshow Program

Super Smart List | **People** | Smart List

List Actions | Person Actions | Delete Person | Select All

View: Default

- Default
- Create View
- Edit Default

	First	Job Title	Company	Em
	Carley			car
	Frank			fra
5	Thompson	Earl	Manager	ear
4	Troy	Marsha	VP of Sales	mt
6	Wendel	Jenny		jen
7	Kim	Victor	Manager	vkii
9	Donaldson	Scott	Manager	sdc
8	Florez	Amy	CEO	am
10	Rolfe	Lawrence	VP of Marketi...	lrol

2. Name the view and find the column you want to add or remove.

Create View

Name: * My Custom View

Hidden Columns

Visible Columns

City

Billing City

City

red City

ADD >>

<< REMOVE

Find...

ID

Status

Full Name

Email

Company

Acquired By

Success

Job Title

Phone

Source

Status Reason


CANCEL CREATE

3. **Add/Remove** your desired columns, then click **Create**.


Create View


Name: * My Custom View

Hidden Columns

country 

Billing Country

Country 

International Country 

Visible Columns

Find...

ID

Status

Full Name

Email

Company

Acquired By

Success


Job Title


Phone

Source

Status Reason


ADD >>

<< REMOVE 

CANCEL **CREATE** 

Tip

To quickly search, use the **Find** box.



Switch Views

1. Click the **View** drop-down, then select the view you want. Switch back and forth between views as needed.

Marketing Activities...

Marketing Activities

- Active Marketing Programs
- Learning
 - My Email Program - CT
 - My Nurture Program
 - My Program - CT
 - Auto Response Campaign
 - Auto Response Email
 - Change Score
 - My Email Alert
 - My Form Test
 - My Page

Super Smart List

Super Smart List | People | Smart List

List Actions | Person Actions | Delete Person

View: My Custom View

Default

My Custom View

Create View

Edit My Custom View

	First	Job Title
	Carley	
	Frank	
	Earl	Manag
4	Troy	Marsha
6	Wendel	Jenny
7	Kim	Victor
9	Donaldson	Scott
8	Florez	Amy
10	Rolfe	Lawrence

Note

You must first create a second view, in addition to the default view, in order to switch views.

Edit a View

1. Make sure that the view you want to edit is selected in the **View** drop-down.

The screenshot shows a CRM interface with a 'Super Smart List' tab selected. The 'People' tab is active, displaying a list of contacts. A dropdown menu is open over the list, showing options for viewing and editing the custom view. Hand icons with numbers 1 and 2 point to the 'View: My Custom View' and 'Edit My Custom View' options respectively.

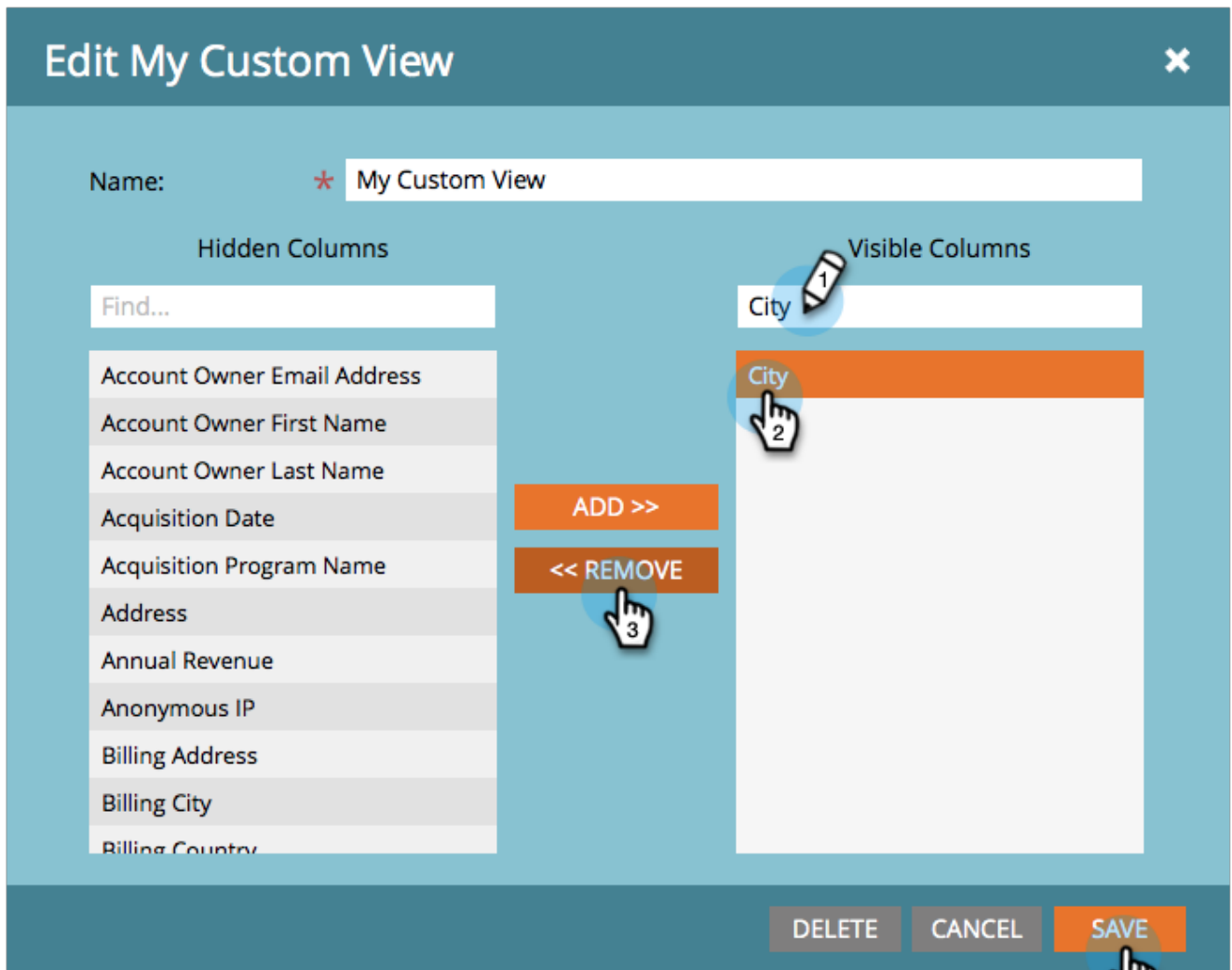
View: My Custom View	Default	First	Job Title
● My Custom View		Carley	
+	Create View	Frank	
✎	Edit My Custom View	Earl	Manag
4	Troy	Marsha	VP of S
6	Wendel	Jenny	
7	Kim	Victor	Manag
9	Donaldson	Scott	Manag
8	Florez	Amy	CEO
10	Rolfe	Lawrence	VP of M

2. Click the **Edit** option.

The screenshot shows a CRM interface with a navigation pane on the left and a main content area on the right. The navigation pane includes a 'Marketing Activities...' section with various programs and campaigns. The main content area is titled 'Super Smart List' and has tabs for 'People' and 'Smart List'. A dropdown menu is open for 'View: My Custom View', showing options like 'Default', 'My Custom View', 'Create View', and 'Edit My Custom View'. A table of people is visible below the dropdown, with columns for 'First' and 'Job Title'. Two callouts, '1' and '2', point to the 'View: My Custom View' dropdown and the 'Edit My Custom View' option respectively.

	First	Job Title
Default	Carley	
My Custom View	Frank	
Create View	Earl	Manag
Edit My Custom View	Marsha	VP of S
4	Troy	
6	Wendel	Jenny
7	Kim	Victor
9	Donaldson	Scott
8	Florez	Amy
10	Rolfe	Lawrence

3. Make the changes you want and click **Save**.



Delete a View

1. Select the **Edit** option for the view you want to delete from the **View** drop-down.

The screenshot shows a CRM interface with a navigation sidebar on the left and a main content area on the right. The sidebar contains a tree view of 'Marketing Activities' including 'Active Marketing Programs', 'Learning', and 'My Program - CT'. The main content area has tabs for 'Super Smart List', 'People', and 'Smart List'. Below the 'Super Smart List' tab, there are buttons for 'List Actions', 'Person Actions', and 'Delete Person'. A dropdown menu is open for 'View: My Custom View', showing options: 'Default', 'My Custom View', 'Create View', and 'Edit My Custom View'. A table of people is visible below the dropdown, with columns for 'First' and 'Job Title'. Two mouse cursors are pointing to the 'View: My Custom View' dropdown and the 'Edit My Custom View' option.


	First	Job Title
Default	Carley	
My Custom View	Frank	
Create View	Earl	Manag
Edit My Custom View	Marsha	VP of S
4	Troy	
6	Wendel	Jenny
7	Kim	Victor
9	Donaldson	Scott
8	Florez	Amy
10	Rolfe	Lawrence

2. Click **Delete**.

Edit My Custom View ✕

Name: ★

Hidden Columns		Visible Columns
<input type="text" value="Find..."/>		<input type="text" value="Find..."/>
Account Owner Email Address		ID
Account Owner First Name		Status
Account Owner Last Name		Full Name
Acquisition Date	<input type="button" value="ADD >>"/>	Email
Acquisition Program Name	<input type="button" value="<< REMOVE"/>	Company
Address		Acquired By
Annual Revenue		Success
Anonymous IP		Job Title
Billing Address		Phone
Billing City		Source
Billing Country		Status Reason



Only you can see the custom views you create in the View drop-down, so tell your friends they need to create their own!

Related Articles

- [Use Built-in/System Smart Lists](#)
- [Create a Smart List](#)

