List View Configuration (2026-04 Release)

List Views allow you to manage candidates, as well as contacts and accounts in this release, in an actionable way through configurable lists in MSR — think "Top Candidates This Week" or "DMU List." Take action directly from the list by emailing, calling or WhatsApping, or instantly link candidates, contacts and accounts to the right vacancy, match list or another workflow.

With the column filter, you can quickly search within columns. Fields can also be edited directly inline. In addition, a fade-in panel has been added, with, for example, a Maia summary, so that you can view the most important information without fully opening the candidate.

Users can create their own personal view based on a Managed View by adding additional criteria. This document shows you how to set up curated list views and how users can work with them.

Setup

Permissions

List views are stored in the existing List View, List View Column, and List View Constraints objects. Administrators and users must have read and write permissions on all fields of these objects. For administrators, the 'List View Configuration' tab must also be visible.

Managed list views can only be maintained if the user has a custom permission. Assign the "Managed List View Configuration" permission set to users who will be setting up and maintaining lists, or add the custom "msf. Modify Corporate Listviews' to an existing permission set.

In the "Action Settings Workflow" object, a new "List View Type" (msf__Flexi_View_Type__c) field has been added to set up list view action buttons. Action buttons associated with a list view type are not shown in the workflow tiles. Administrators and users must have read and write permissions on this field. Also add this field to the page layout of the object.

Object management

After the initial release, a number of new list boxes were introduced, which must be manually added to the objects.

Go to Setup > Object Manager. Find the object and go to Fields & Relationships. Scroll to the Values section and click New.

- **List View (msf__List_View__c), List View Type (msf__Flexi_View_Type__c) field:** Add the following values:
  myAccounts
  myContactPersons
- **Workflow Action Setup (msf__Workflow_Action_Setup__c), "List View Type" field (msf__Flexi_View_Type__c):** Add the following values:
  myAccounts
  myContactPersons

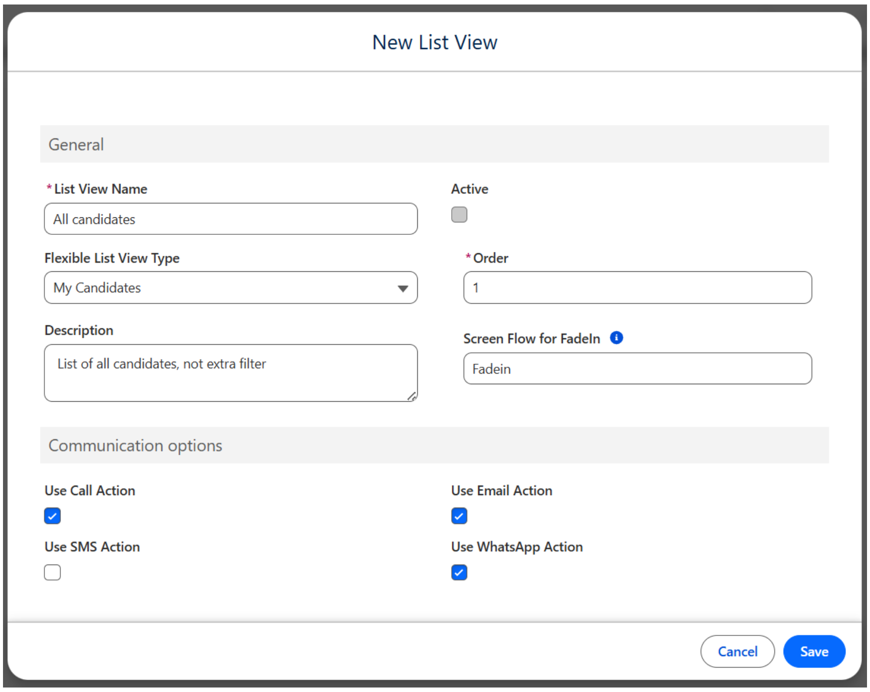
If you are going to configure the list views for the first time in this release, you will also need to add these values.

- **List View Constraints (msf__List_View_Constraint__c), Search Type (msf__Search_Type__c) field**: Add the following values:
  GREATER_THAN
  LESS_THAN
  GREATER_THAN_OR_EQUAL_TO
  LESS_THAN_OR_EQUAL_TO

Setting up a managed list view

Via the app launcher at the top left, choose 'List View Configuration':

Click New to create a curated list view.



Set the following properties:

- **Name:** Give the list view a recognizable name.
- **List View Type**: Choose the List View type. Your choice affects the visible columns and the search criteria. With myCandidates, candidate records are always shown (based on the candidate property) and you can select fields from the contact object as a column. At myAccounts, you can choose from the Account fields. myContactPersons always shows contact records (based on the contact property) and allows you to select both Contact and Account fields.
- **Order:** Determine the order in which the list views will be displayed on the Homepage.
- **Description:** Auxiliary field to distinguish the list from other list views.
- **Screen flow as Fade-in:** Enter the API name of the flow in question. See the 'Fade-in' section below for more information.
- **Communication options:** select the desired actions: Call (connection with softphone), E-mail, SMS (requires SMS subscription) and/or WhatsApp (requires

WhatsApp integration). If you create a myAccount List View, only the Call option is available.

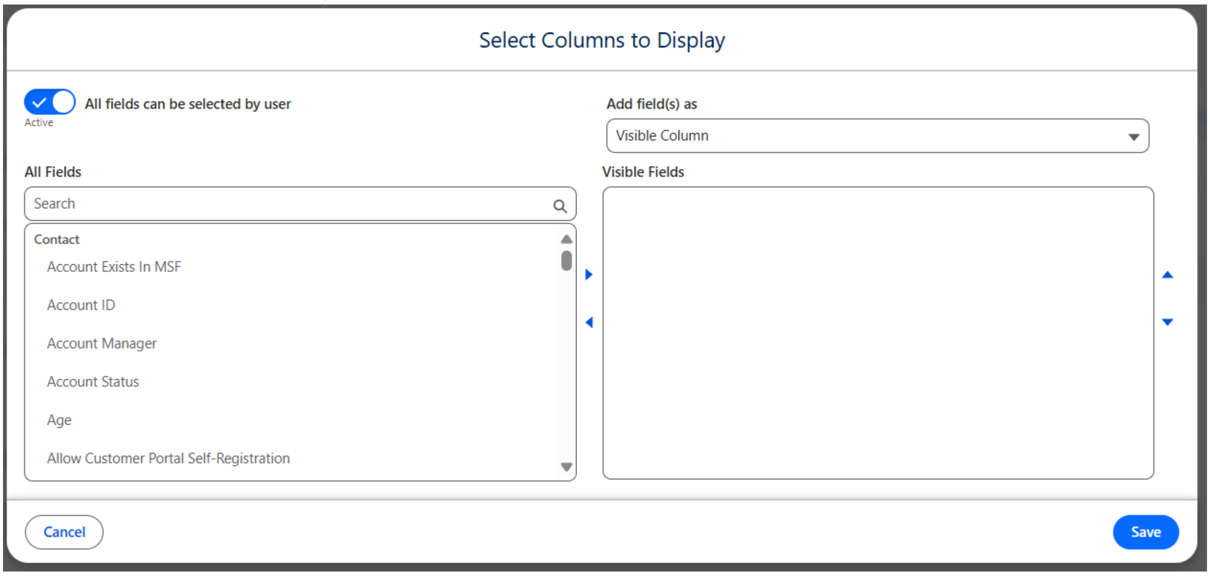
After saving, the list view detail page opens:

This page is made up of the sections Columns, Filters and Column sorting. The action buttons at the top allow you to:

- **Show all list views :** Back to the overview of all list views.
- **View:** Show the list view as the user sees it — even for inactive lists. Inactive list views aren't visible to users.
- **Delete:** Delete the list view
- **Edit:** Customize the properties defined in the previous step.

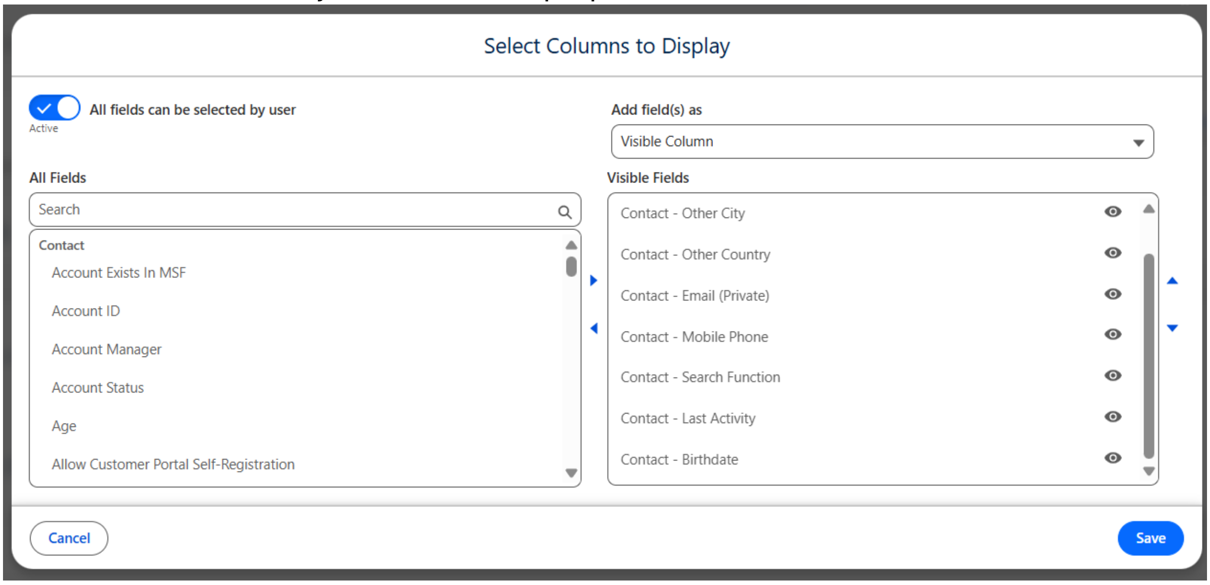
Add columns

In the Columns section, click "New" to define columns:

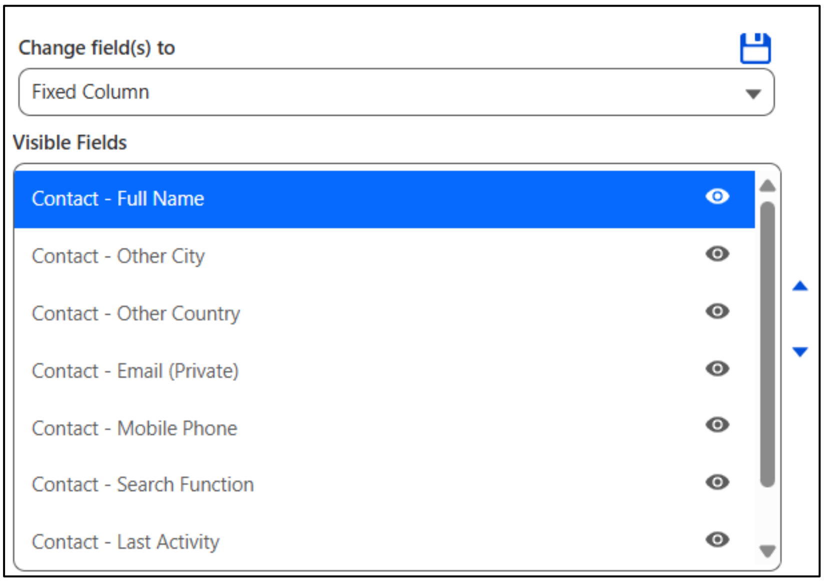


By default, the option 'All fields can be selected by the user' is active. This means that you only have to define the columns you want; Users can add additional columns in their personal list view from any available fields on the Contact and/or Account object.

If you don't want this, disable the option 'All fields can be selected by the user'. On the left you will see all the available fields of the chosen object. Add the desired fields with the arrows and then adjust the order or properties:

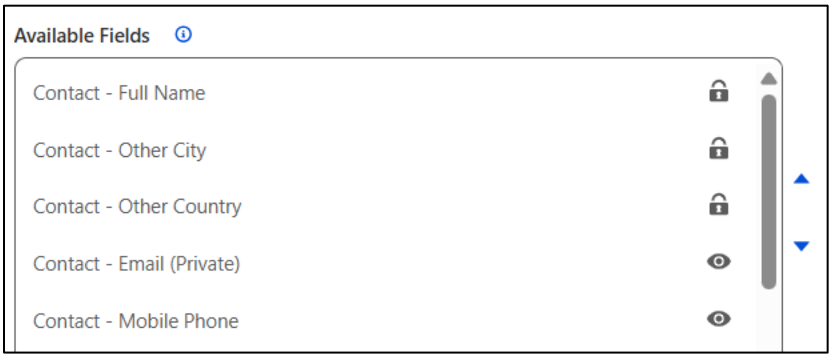


By selecting one or more fields in the right window, you can pin a column via 'Change field(s) to'.



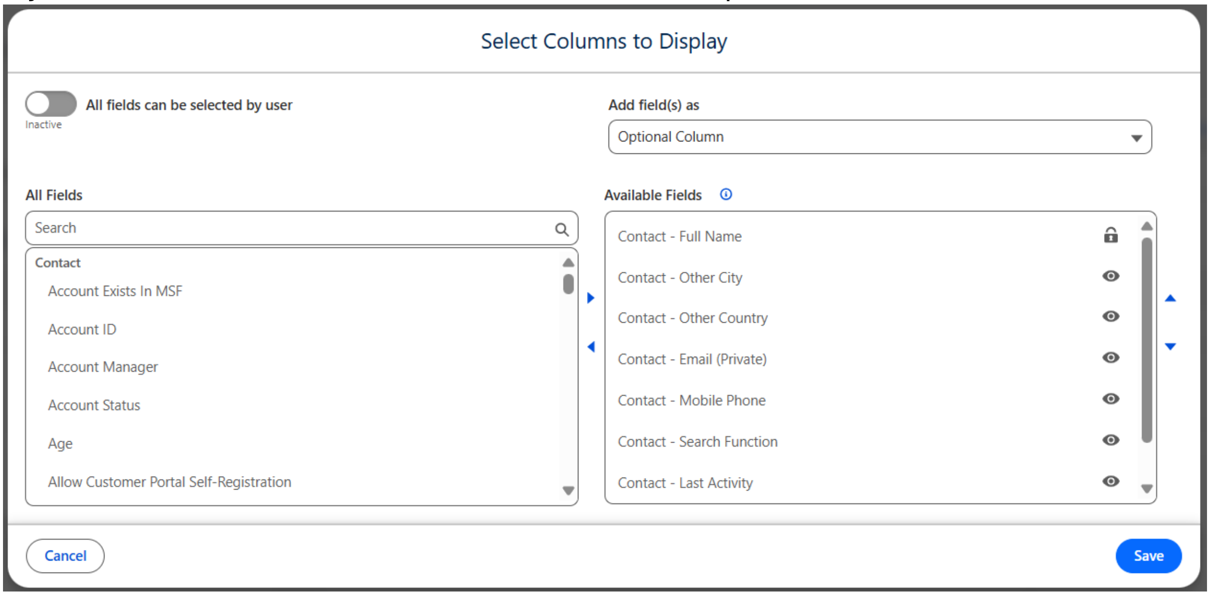
Pinned columns are at the top of the list and appear in the list view on the left. Users in Personal List Views can't reposition pinned columns. You can apply this change with the save icon.

The icon behind the field name indicates whether this is a fixed column or a visible column:



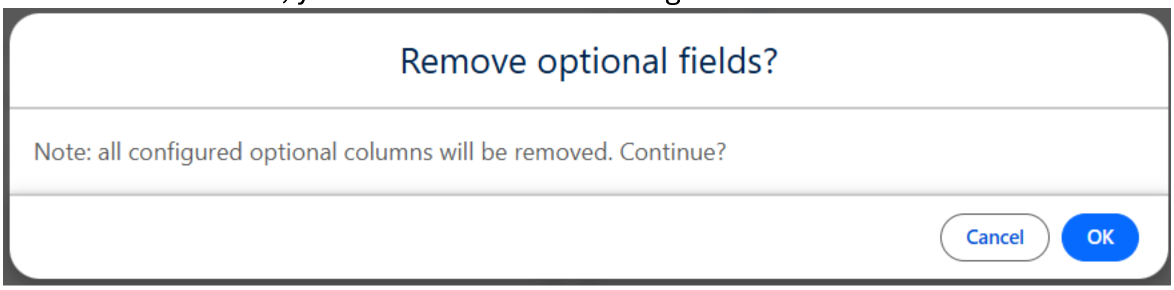
With the arrow keys on the right, you move a column.

If you uncheck the "All fields can be user-selected" option, the screen will look like this:



The "Add field(s) as" setting will automatically switch to "Optional column." These fields are then placed in the list below the last visible column, without a symbol.

If you have added optional columns and you switch back to the option that all fields are available to the user, you will receive this warning:



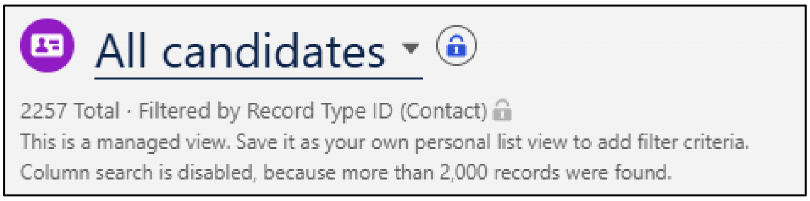
If you break this off, you return to the previous screen. If you continue, all optional columns will be hidden. If you save the column definition, the optional columns are removed from the list view definition.

Once you've saved the column definition, you'll be taken back to the list view.

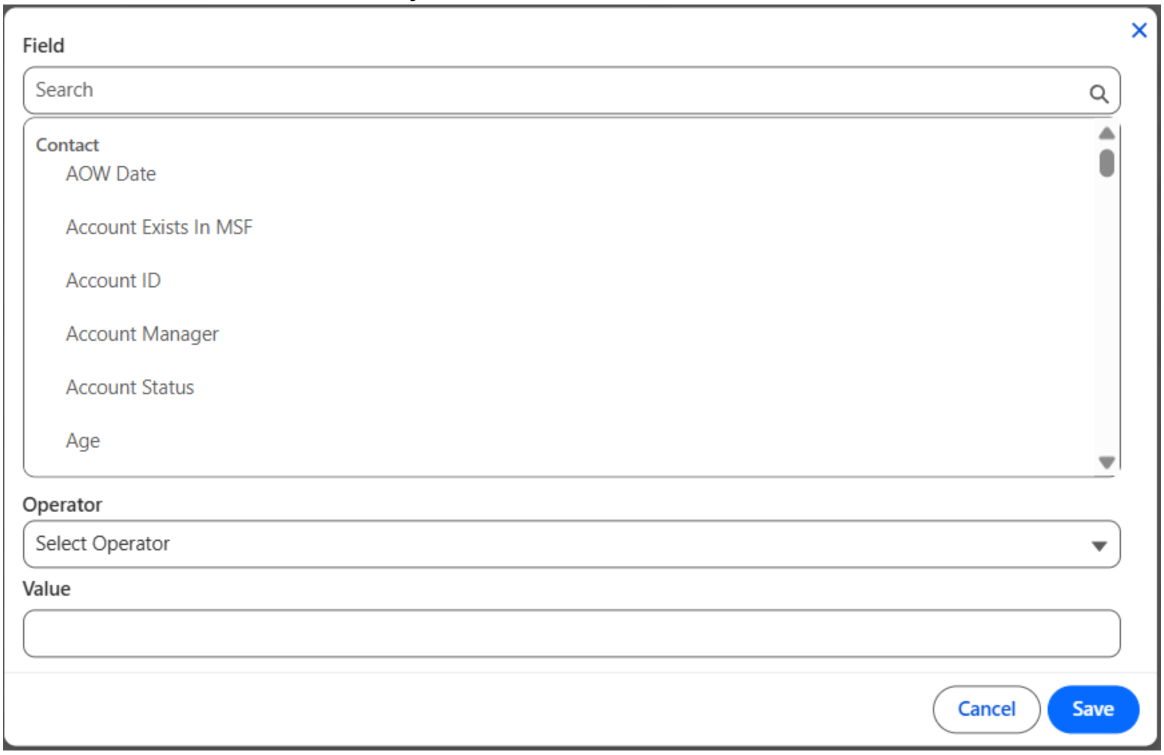
Add filters

In the filter section, add the selection criteria for the list view. The number behind the filter shows how many records match the specified criteria:

Note: If more than 2,000 candidates meet the filter criteria, searching within columns is not possible. Therefore, make sure that the filters do not select more than 2,000 records. Users will see a notification if this limit is exceeded.



The "Add filter" button allows you to set these search criteria:



Field

You can set criteria from the following items:
Which object fields you can select depends on the type of list view:

myCandidates	**myContactPersons**	**myAccounts**
Contact	Contact	Account
Application	Account (via Account field)	Contact (via Account field)
Match	Match	Match
Employment contract	Placement (via field msf__Contact_person__c)	Placement (via field msf__Account__c)
Placement (via field msf__Contact__c)	Vacancy (via field msf__Contact_person__c)	Vacancy (via field msf__Account__c)
Absense		
Income guarantee for migrant workers (only for Combi customers)		

The result is automatically filtered by the properties of the contact record (msf__Is_Not_Contact_Person__c and msf__Is_Not_Candidate__c). You don't have to add these yourself.

If you enter a field name, all corresponding fields will be displayed, including the object name. If there are no fields in the object in question, you will only see the object names.

Special fields

In addition to the database fields, a number of special fields are also available.

Contact (in the case of myCandidates): Choose "Contract Available", "Placement Available" or "Application Available" to quickly filter for candidates with at least one record of that type.

Application: Filter by "Status at any time." This will check whether a candidate's application has ever reached a certain status, regardless of the current status.

Operators and values

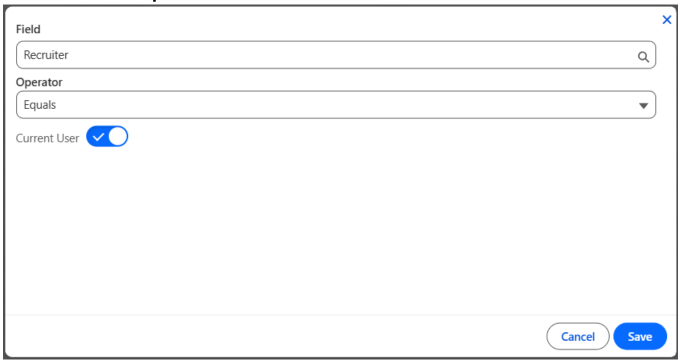
The available operators depend on the chosen field type. For example, text fields have "Contains," "Does not contain," "Equals," "Does not equal," "Is blank," and "Is not empty." For reference fields, only "Equals" and "Does not equal" are available.

A number of field types have specific value possibilities:

Reference fields (ID fields): Type a search value and select one or more values. Examples: Record Type, Team, Account:

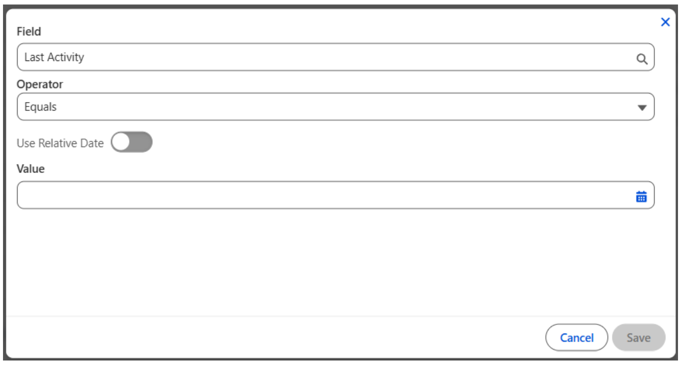
In the search field, enter the value and select one or more available values.

For reference fields to a user, for example Recruiter, Account Manager or Owner, you have this option:



In this type of field, you can select the 'Current user' option to dynamically apply the filter to the logged-in user. This allows each recruiter to see his or her own candidates.

Date fields

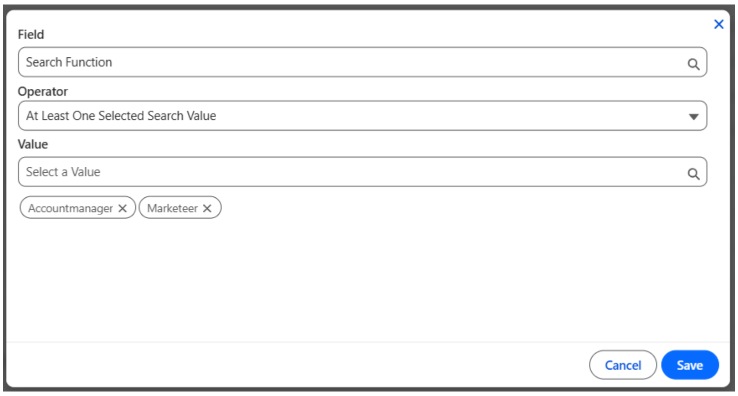


For date fields, you can choose to enter a date via the date picker, or use the 'Relative date' option with a date formula:

- When used with operators 'Equals', 'Does not equal': for example, NEXT_N_DAYS:14 (the next 14 days), LAST_N_DAYS:30 (the last 30 days), THIS_YEAR (current calendar year).
- In combination with operators 'Greater than', 'Greater or equal to', 'Less than', 'Less than or equal to': for example, YESTERDAY, TODAY, TOMORROW.

See the Salesforce Help Page for a complete overview of relative date filters.

Combo list values



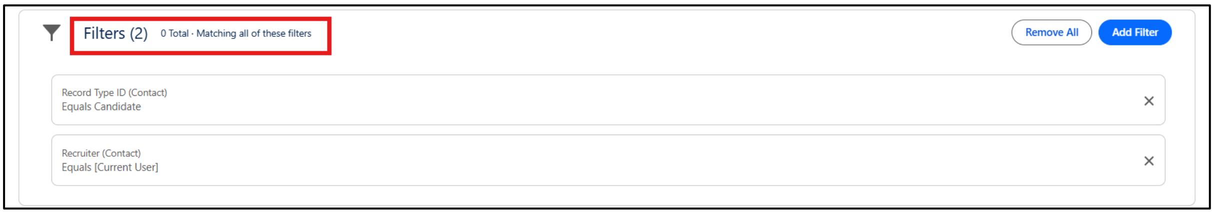
For single or multiple combo lists, you can choose the relevant values from the list.

When changing the field, the operator and the entered value are always deleted again.

With save you apply the filter. The results shown comply with all filters.

With the cross on the right you remove the filter again. The 'Remove All' option removes all filters.

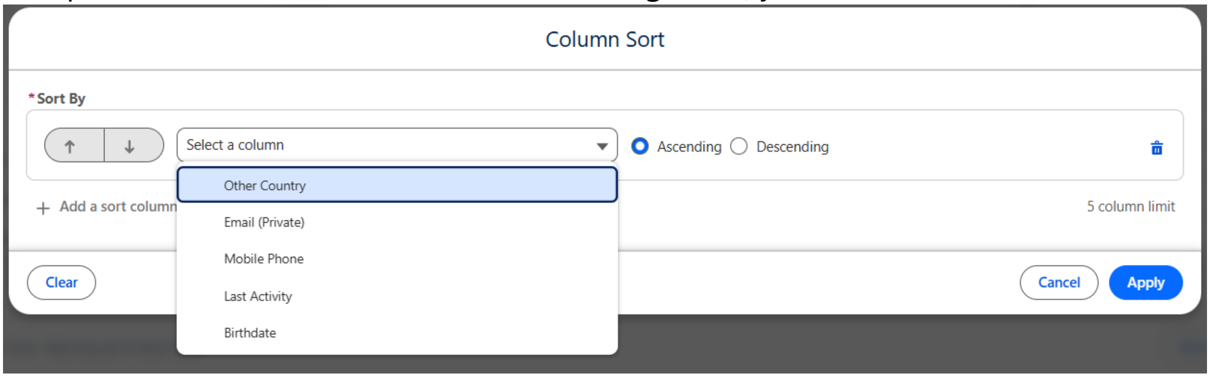
If you have applied filters that do not select any candidate, you will see that immediately:



Note: If you have set a relative filter to recruiter, for example, it is possible that no records are found for the user who sets up the list view.

Set up column sorting

In Personal List Views, users can always adjust the sorting by clicking the column title. If a specific default sort is relevant to the managed list, you can set it here:

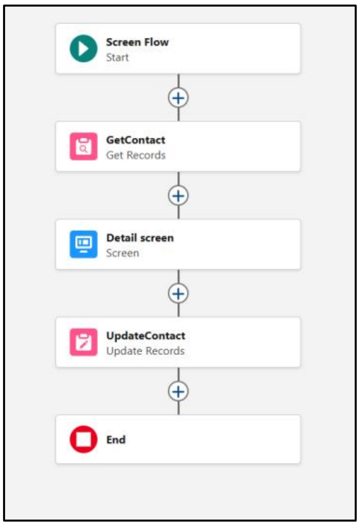


Choose the desired field, determine the sort order (ascending or descending), and add up to five columns for combined sorting if necessary. Sorting by encrypted fields is not possible.

Fade-in

From the list view, you can start a screen flow that opens as a Fade-in panel on the right side of the screen.

This flow for the myCandidates could look like this:



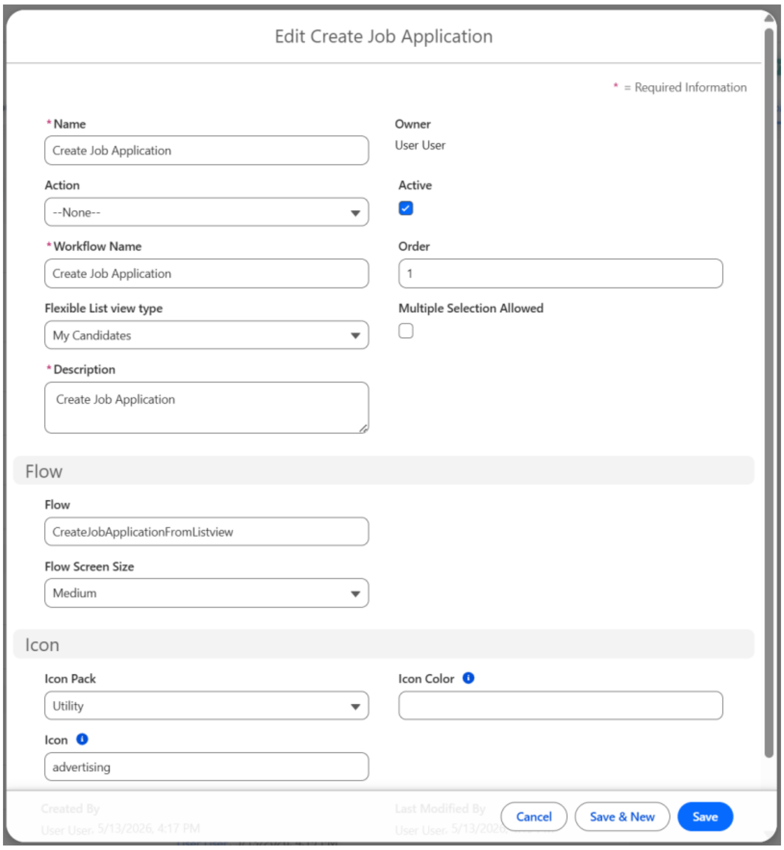
The input variable is the default recordId. The Fade-in only works with a single selection.

In the flow, you can first retrieve the selected record, so that you show the candidate's Maia Insight summary, for example. If you also want to edit the candidate's fields, add the 'Update records' component to the flow. If you only want to show data with no action options, you can turn off the footer in the display component.

Enter the API name of the Fade-in screen flow in the list view properties.

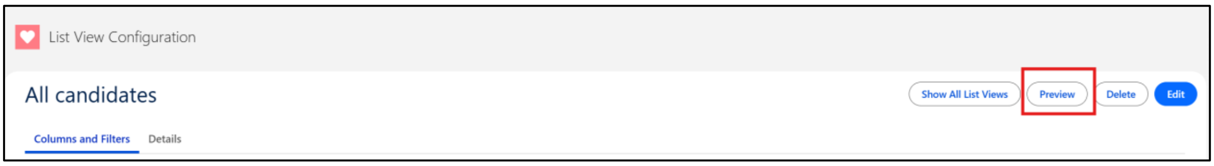
Action buttons

In addition to the communication options (call, email, text, WhatsApp), you can also set flow actions as action buttons in the list view. To do this, go to 'Workflow action settings' via the app launcher and add a new setting:

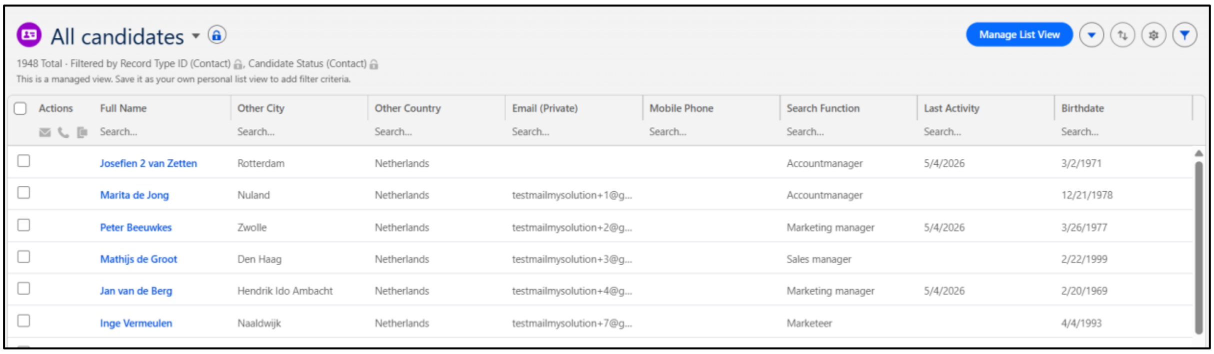


- **Workflow name:** Choose the name of the action. It doesn't have to match a workflow definition.
- **List view type:** Choose from the list which type of list view you want the action to be available for. Multi-selection is possible if the screen flow supports it.

View active list view or inactive



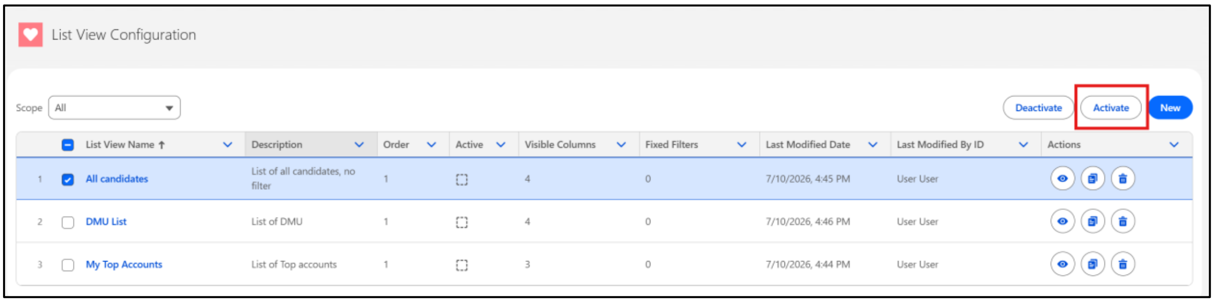
Once you've set up columns, filters, and sorting, click "View" to see the result as users will see the list view:



The "Manage List View" button returns to the previous screen to make adjustments.

Activate List View

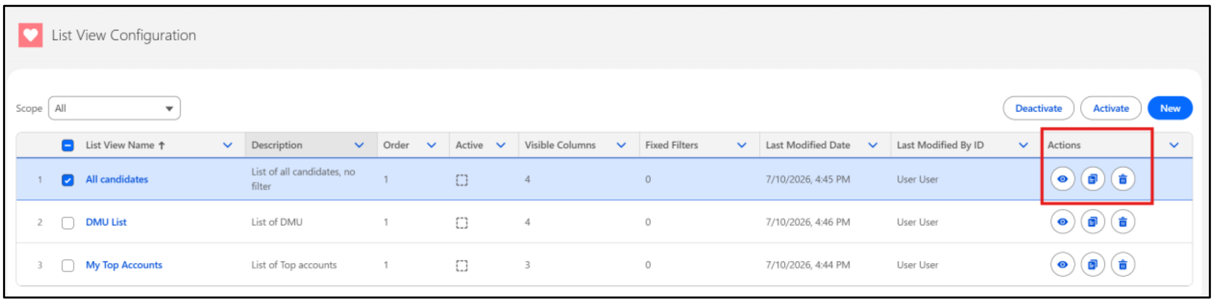
Don't forget to activate the list view. Go to the list view overview and click on 'Activate':



You can activate the list view by editing it and ticking it to active.

From this screen, you can also make an existing managed list inactive again. Users who have saved this list view as a personal list are not affected. However, you won't be able to delete the list view.

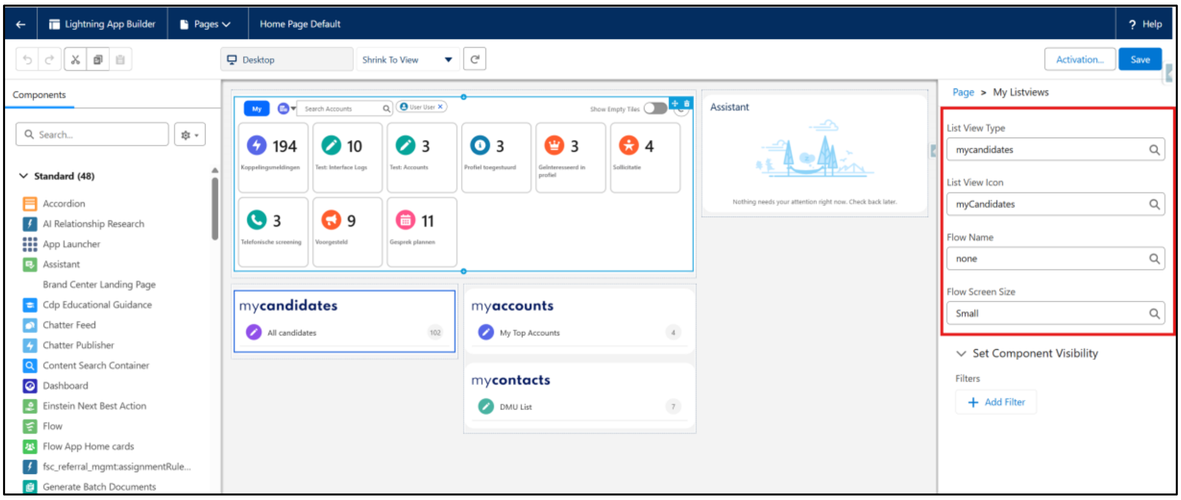
You can also take additional actions from this screen:



- **View:** Open the list view to check the definition.
- **Duplicate:** Make a copy of the list view including all columns, filters, and sort settings.
- **Delete:** Delete the list view. If the list was saved as a personal list by a user, you'll receive a notification.

Page Layout Homepage

Users can access the list views via a component on the Homepage.



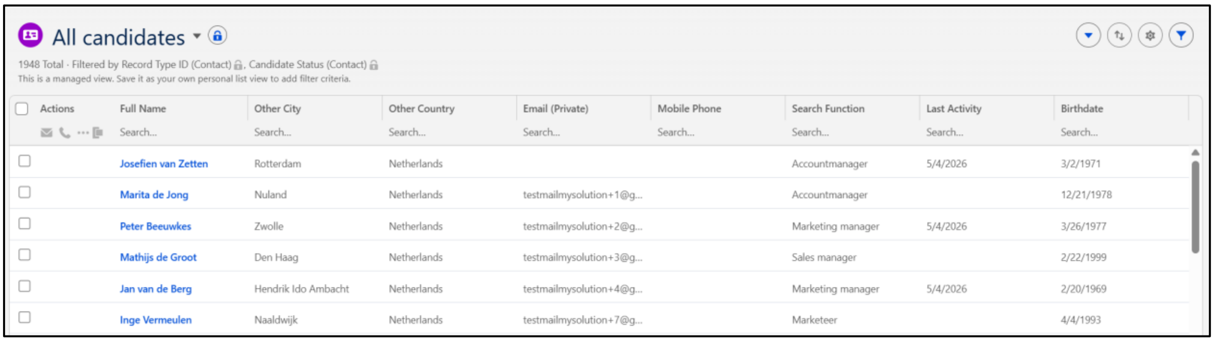
Customize the Homepage and place the 'My listviews' component in the desired location. You can place the same component multiple times on the page, each with the specific selection of lists for candidates, contacts, and accounts. In the properties of the component, set the following:

- **List View Type:** Choose from 'myCandidates', 'myContactPersons' and 'myAccounts'.
- **List View Icon:** choose from 'myCandidates', 'myContacts' and 'myAccounts'.
- **Flow Name:** optional — to be used to create a candidate via a screen flow.
- **Flow Screen Size:** Choose the screen size you want if you're using a screen flow.

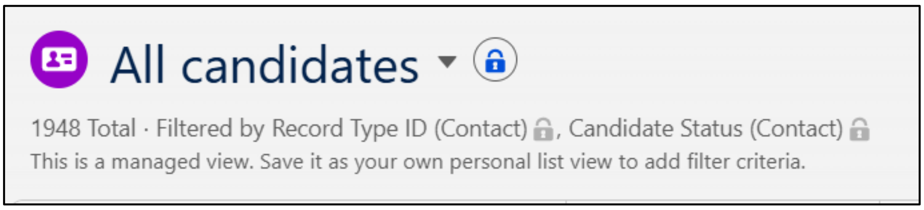
Once the list view is active, it will be visible from the component on the Homepage.

Using the List View

Users without administrator rights for list views see the next view when they click the name of a list view from the Home page.



At the top left, the total number of candidates is shown, along with the properties of the list.

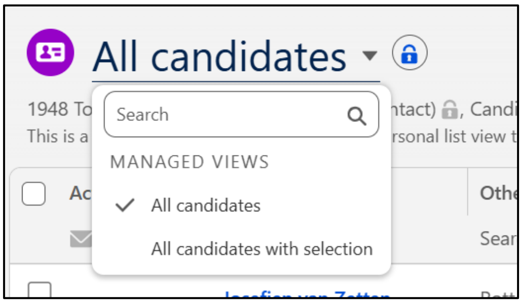


The lock icon indicates that this is a curated list whose filtering criteria cannot be changed by the user.

Actions available to users

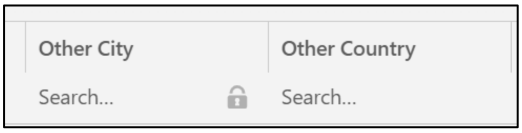
Switch list view

Click the arrow to open the list selector. Managed lists are shown at the top, personal lists below.

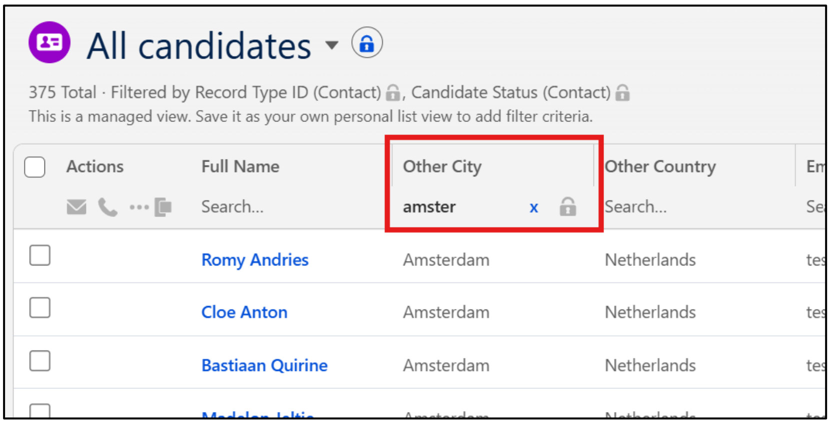


Search in columns

Place the mouse cursor in the column header to activate the search option. The lock symbol on the right indicates that you cannot adjust the filter of a managed list.



Type a search value to filter the result.

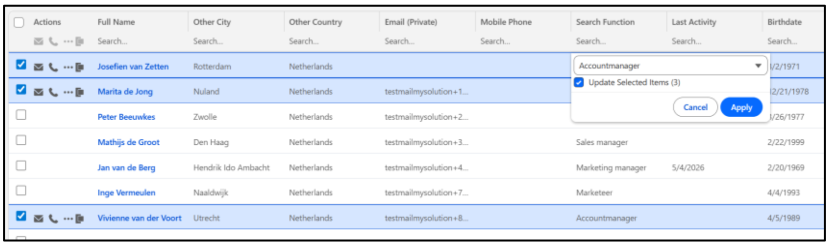


You can search multiple columns at once. Remove a search term with the cross or by refreshing the page. Column filters are not saved. In some field types, such as long text fields, search isn't available.

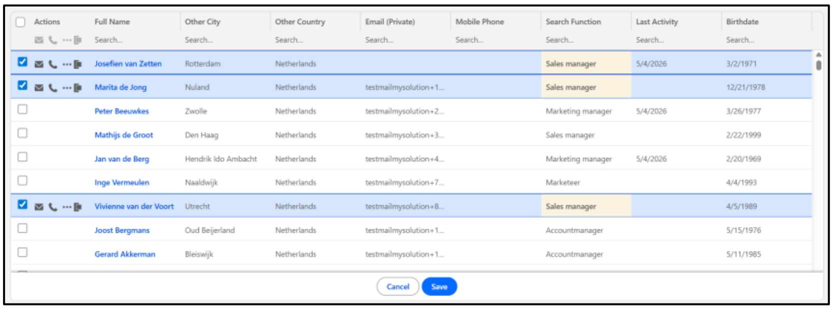
Edit fields inline

Click the pencil icon in a cell to edit the value instantly.

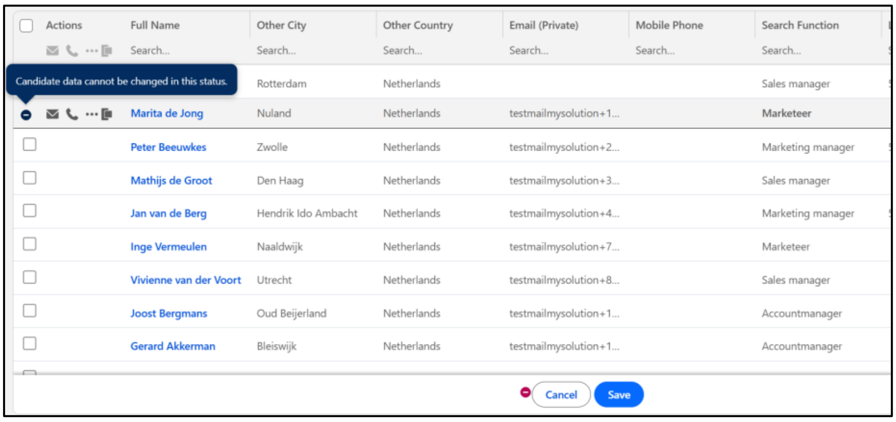
You can also select multiple candidates (up to 50) and change a value at a time



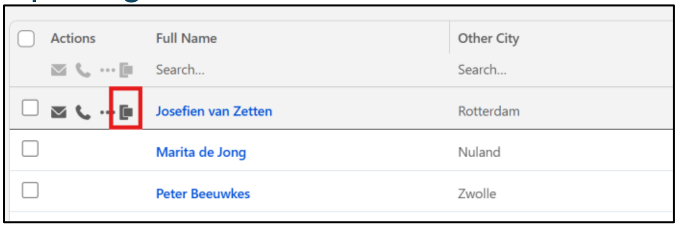
After applying, you can visually see which fields have been modified and a notification will appear to save the changes.



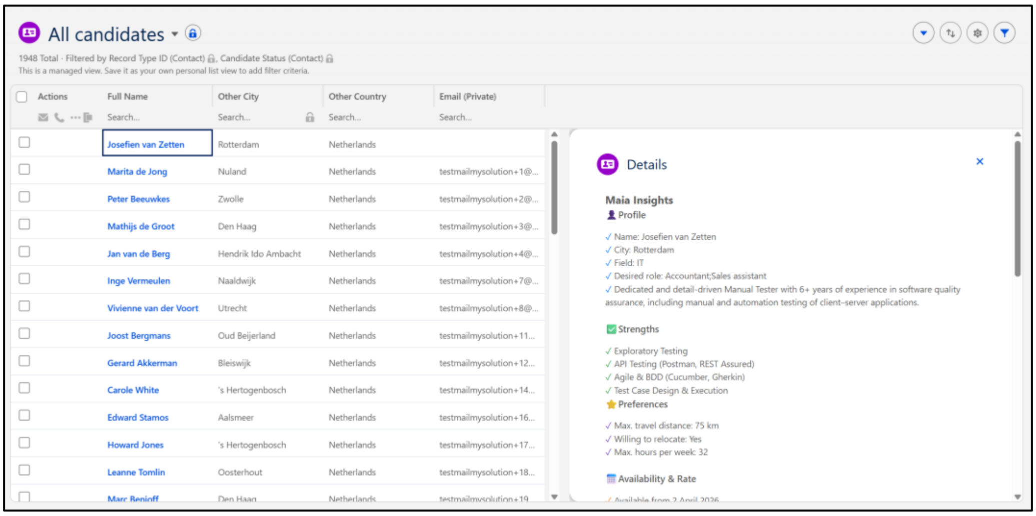
If a candidate can't be updated due to a validation error, it's indicated by an icon on the affected record:



Opening Fade-In



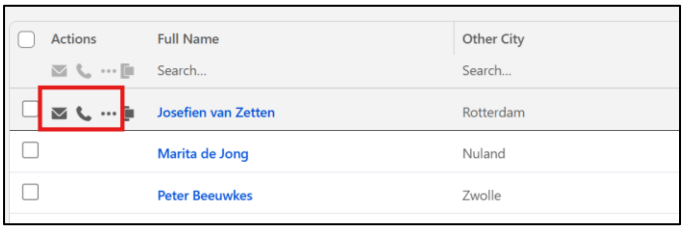
The Fade-in button is the rightmost button in the action button column. Click on it to open the Fade-in panel on the right.



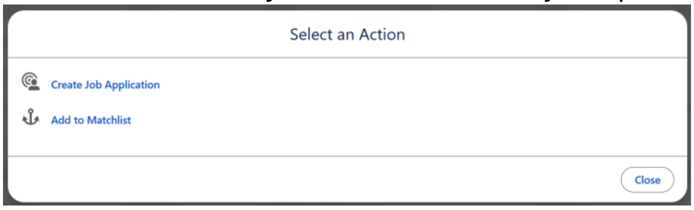
In this example, you can see Maia Insights. Close the panel by clicking the button again or via the cross at the top right. If you click on another candidate's Fade-in button, the panel will open directly for that candidate.

Perform actions

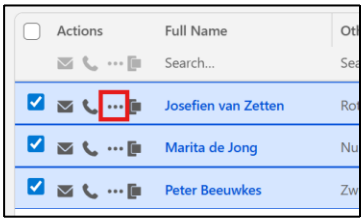
Based on the communication options and Workflow action settings, action buttons are shown per line.



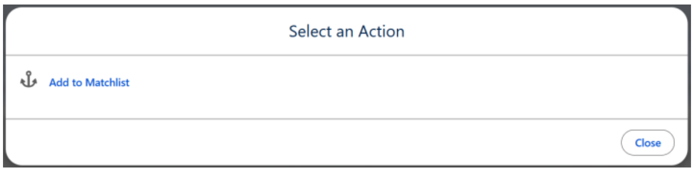
The Email button opens the email screen. Via the phone icon, you can call directly to the candidate's mobile number. If SMS or WhatsApp is configured, they can also be started immediately. Via the three dots you open the workflow actions:



In this example, 2 actions are for a single selection action.



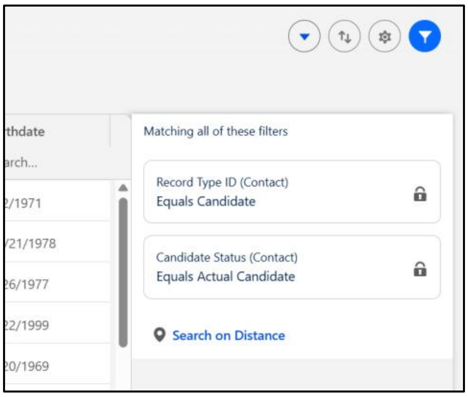
If you select multiple candidates and you click on the dots in one of the lines, you will see all the actions that are available:



Search by postcode

Via the filter button at the top right you can search by distance.

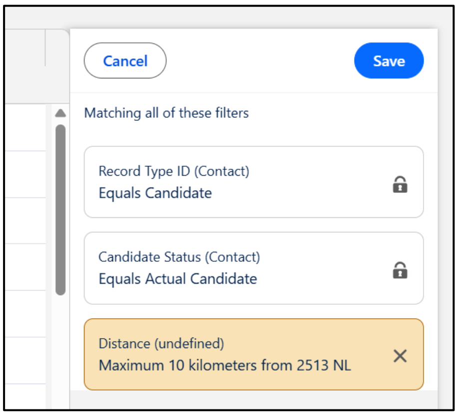
The filter panel folds open:



As a user, you cannot adjust the set filters.

Click Remote Search to open the search screen:

By default, the country code is determined based on the country set on the logged-in user's profile.



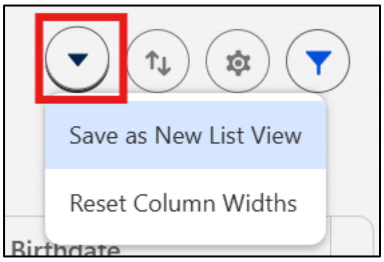
If you apply the filter, you will return to the filter panel. You then save this, after which you immediately see the results.

Note: Postal code filters are not stored on managed lists.

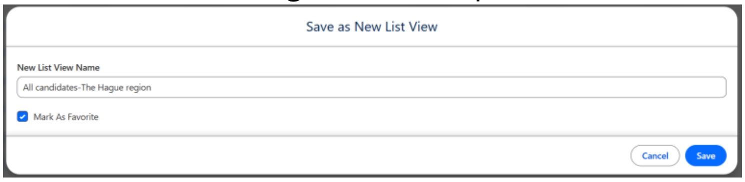
The postcode searched for depends on the type of list view:

- myCandidates: Other Postal Code
- myAccounts: Shipping Postal Code (ShippingPostalCode)
- myContactPersons: Other Postal Code or Shipping Postal Code of the associated account record.

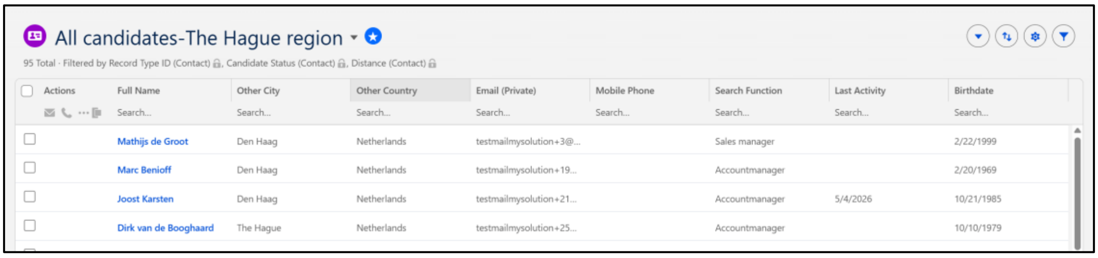
Create and manage personal list view



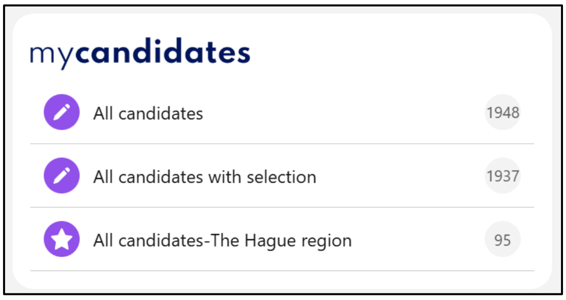
You can turn a managed list into a personal list view from the left submenu:



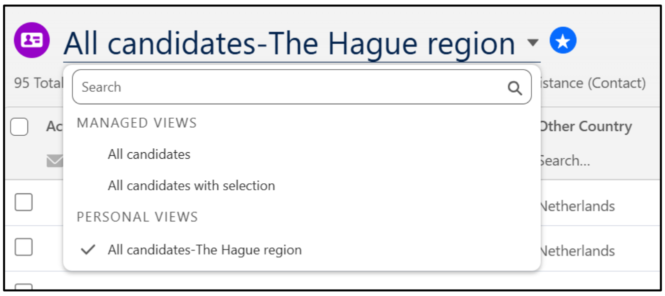
Name your personal list and mark it as a favorite if necessary. Once saved, the icon next to the list display name will change to a star:



Only one personal list can be set as a favorite; a favorite is immediately visible in the component on the Homepage:



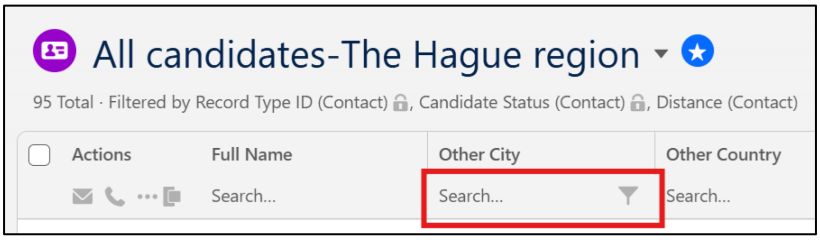
Personal lists are shown in the top left of the list view selector:



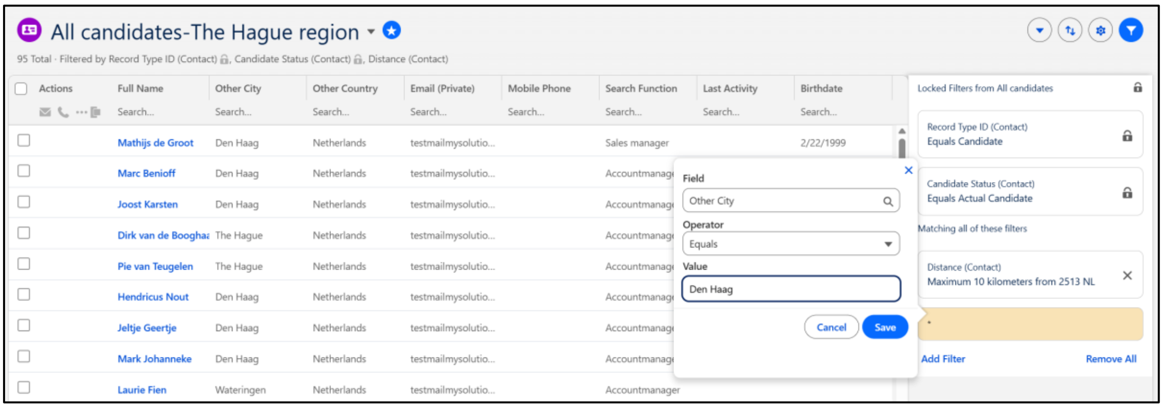
The last option in the managed list is to reset the column width of the managed list.

Add filters

In a personal list, click the filter icon in the column header to set a filter instantly



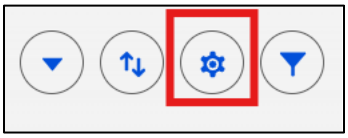
In the filter panel, you can also set filters on fields that aren't available as a column.



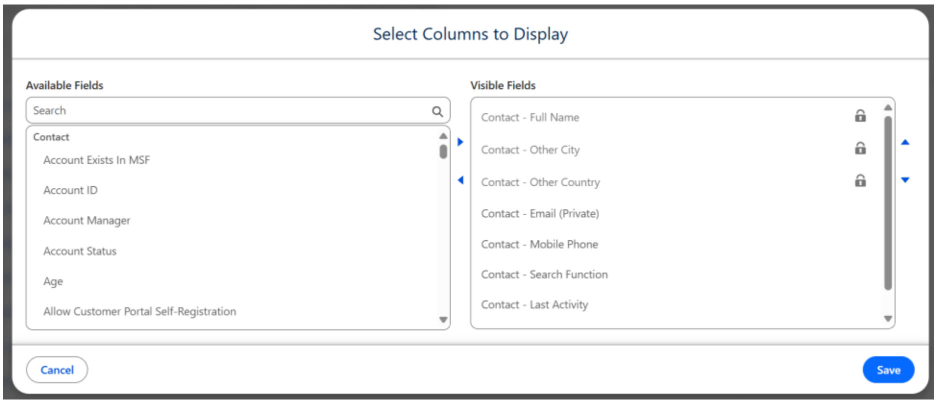
Filters captured in the curated list view have a key icon and are not customizable. You'll also see which managed list the personal list view was derived from.

If you apply the filter, you will also see it in the information line at the top left:

Customize columns



The gear icon opens the column selector



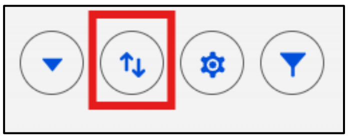
Depending on the setting on the managed list view, you'll see all fields of Person, Employment Contract, Job Application, Match, Placement, and Absence.

Existing columns can be deleted, unless they have been pinned by the administrator.

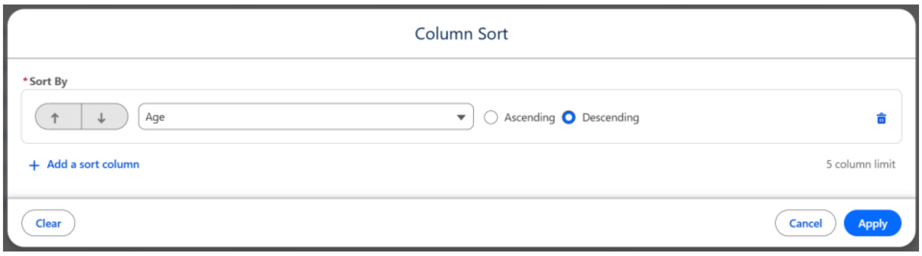
Adjust sorting

Click on a column title to activate the sorting. Clicking again alternates between ascending and descending.

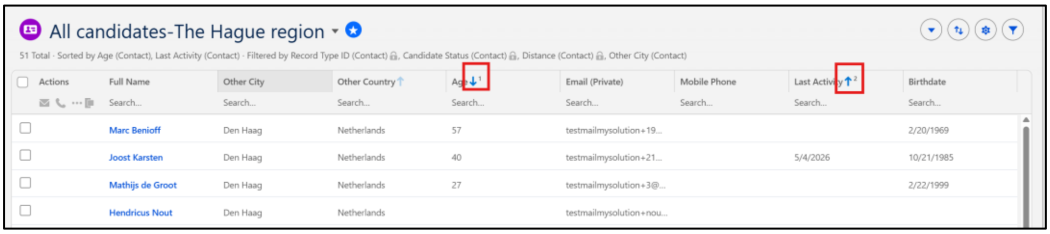
For sorting by multiple columns, choose the sort option and you can choose up to five columns



You will then be taken to this screen:

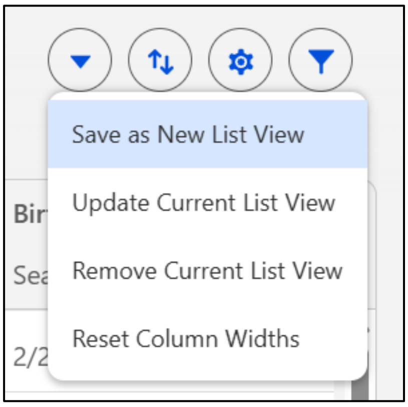


The sort order is visible in the column headers:

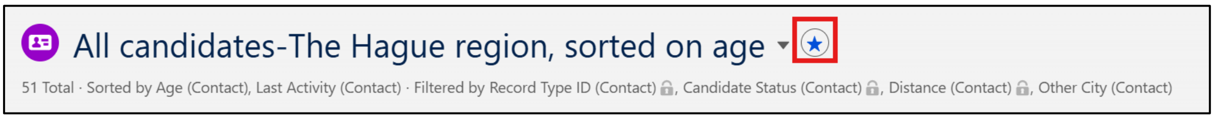


Manage personal list

Via the submenu you can duplicate, edit (rename and set as favorite) or delete a personal list.



You can also click directly on the star icon behind the list display name to set a list as a favorite:



The icon will then turn blue and it is now set as a favorite.

When a personal list is deleted, a confirmation message follows.