

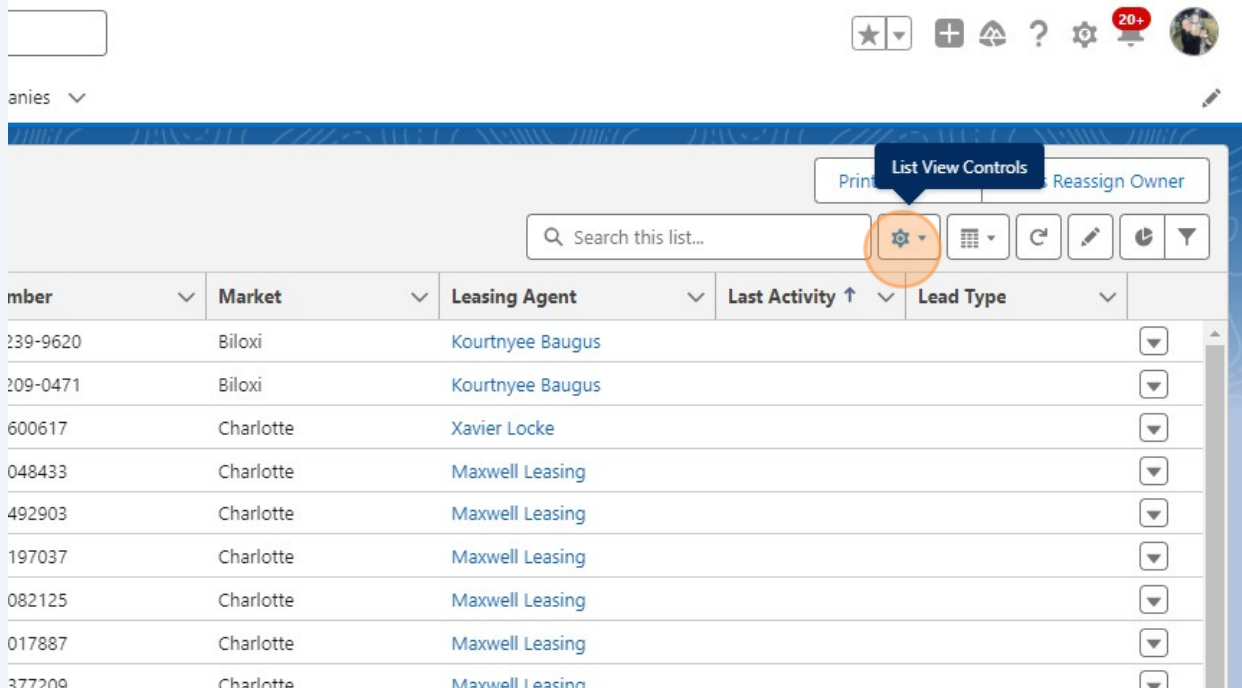
How to Clone Actively Working in Salesforce

1

Navigate to <https://sconciierge.lightning.force.com/lightning/o/Opportunity/list?filterName=00B5e000004dd6iEAA>

2

Click here.



The screenshot shows the Salesforce interface for an Opportunity list view. At the top, there is a search bar and a toolbar with icons for star, add, refresh, help, settings, notifications (20+), and a user profile. Below the search bar, there is a dropdown menu labeled 'anies'. The main content area displays a table of opportunities. The table has columns: 'number', 'Market', 'Leasing Agent', 'Last Activity', and 'Lead Type'. The 'number' column is highlighted in red. The 'Leasing Agent' column is highlighted in blue. The 'Last Activity' column is highlighted in green. The 'Lead Type' column is highlighted in yellow. The table contains 8 rows of data. A callout box labeled 'List View Controls' points to the settings icon (gear) in the toolbar. The settings icon is circled in orange.

number	Market	Leasing Agent	Last Activity	Lead Type
239-9620	Biloxi	Kourtnyee Baugus		
209-0471	Biloxi	Kourtnyee Baugus		
600617	Charlotte	Xavier Locke		
048433	Charlotte	Maxwell Leasing		
492903	Charlotte	Maxwell Leasing		
197037	Charlotte	Maxwell Leasing		
082125	Charlotte	Maxwell Leasing		
017887	Charlotte	Maxwell Leasing		
277209	Charlotte	Maxwell Leasing		

3 Click "Clone"

anies ▾

Print List View Controls Reassign Owner

Search this list...

Number ▾	Market ▾	Leasing Agent ▾	Last Activity ↑ ▾	Lead Type ▾
239-9620	Biloxi	Kourtnyee Baugus		
209-0471	Biloxi	Kourtnyee Baugus		
600617	Charlotte	Xavier Locke		
048433	Charlotte	Maxwell Leasing		
492903	Charlotte	Maxwell Leasing		
197037	Charlotte	Maxwell Leasing		
082125	Charlotte	Maxwell Leasing		
017887	Charlotte	Maxwell Leasing		
377209	Charlotte	Maxwell Leasing		
802768	Charlotte	Maxwell Leasing		

4 Click the "*List Name" field.

ew seconds ago

Property Name ▾	Assigned Date ▾	Phone Number ▾	Market X ▾
The Gates at Three Ri			K
The Gates at Three Ri			K
Savoy Apartments			X
The Maxwell at Highl			N
The Maxwell at Highl			N
The Maxwell at Highl			N
The Maxwell at Highl			N
The Maxwell at Highl			N
The Maxwell at Highl			N
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The Maxwell at Highl			N
The Maxwell at Highl			N
The Maxwell at Highl			N

Clone List View

* List Name

Copy of 1. My Actively Working | CCA

* List API Name ⓘ

Who sees this list view?

☒ Only I can see this list view

☐ All users can see this list view ⓘ

☐ Share list view with groups of users ⓘ

5 Type Name of Rep that you need to clone

6 Click "Save"

The screenshot shows a user selection interface. On the left, there is a search bar and a list of users. The 'Save' button is highlighted with an orange circle. The background shows a table of users.

Phone Number	City	Rep Name
4044767221003	Atlanta 2	
*6082512223021	Archive	
(580) 231-7373	Oklahoma	Ashley Sawyer
*8172144636527	Fort Worth	
*8178177294354	Fort Worth	
*8179407030192	Fort Worth	
*8172142537268	Fort Worth	

7 Click "My resident connections"

The screenshot shows a CRM interface with a list of leads and a filters panel. The list has columns for 'et', 'Leasing Agent', 'Last ...', and 'Lead Type'. The filters panel on the right has a 'Filter by Owner' section with 'My resident connections' selected. Other filters include 'Stage equals Actively Working'.

et	Leasing Agent	Last ...	Lead Type
	Kourtnyee Baugus		
	Kourtnyee Baugus		
otte	Xavier Locke		
otte	Maxwell Leasing		
otte	Maxwell Leasing		
otte	Maxwell Leasing		
otte	Maxwell Leasing		
otte	Maxwell Leasing		
otte	Maxwell Leasing		
otte	Maxwell Leasing		

Filters

Filter by Owner
My resident connections

Matching all of these filters

Stage equals Actively Working

Add Filter Remove All

Add Filter Logic

8 Click here.

The screenshot shows a CRM interface with a list of leads and a filters panel. The list has columns for 'Phone Number', 'Market', and 'Leas'. The filters panel on the right has a 'Filter by Owner' section with 'All resident connections' selected. Other filters include 'My resident connections', 'My territories' resident connections', 'My territory team's resident connections', and 'My team's resident connections'.

Phone Number	Market	Leas
*228(228) 239-9620	Biloxi	Kour
*228(504) 209-0471	Biloxi	Kour
*27048037600617	Charlotte	Xavi
*27047048048433	Charlotte	Max
*27047046492903	Charlotte	Max
*27049803197037	Charlotte	Max
*27047046082125	Charlotte	Maxwell Leasing
*27049373017887	Charlotte	Maxwell Leasing
*27047047377209	Charlotte	Maxwell Leasing

Filter by Owner

☒ All resident connections

☐ My resident connections

☐ My territories' resident connections

☐ My territory team's resident connections

☐ My team's resident connections

Done

9 Click "Done"

The screenshot shows a CRM interface with a table of leads. A dropdown menu titled 'Filter by Owner' is open, displaying five options: 'All resident connections' (selected), 'My resident connections', 'My territories' resident connections', 'My territory team's resident connections', and 'My team's resident connections'. An orange circle highlights the 'Done' button at the bottom of the dropdown. In the background, a 'Filters' panel is visible, showing 'Filter by Owner' set to 'My resident connections' and 'Stage equals Actively Working'.

Lead	Leasing Agent
1	Kourtnyee Baugus
2	Kourtnyee Baugus
3	Xavier Locke
4	Maxwell Leasing
5	Maxwell Leasing
6	Maxwell Leasing
7	Maxwell Leasing
8	Maxwell Leasing
9	Maxwell Leasing
10	Maxwell Leasing
11	Maxwell Leasing
12	Maxwell Leasing
13	Maxwell Leasing
14	Maxwell Leasing
15	Maxwell Leasing
16	Maxwell Leasing
17	Maxwell Leasing
18	Maxwell Leasing
19	Maxwell Leasing
20	Maxwell Leasing
21	Maxwell Leasing
22	Maxwell Leasing
23	Maxwell Leasing
24	Maxwell Leasing
25	Maxwell Leasing
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39	Maxwell Leasing
40	Maxwell Leasing
41	Maxwell Leasing
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93	Maxwell Leasing
94	Maxwell Leasing
95	Maxwell Leasing
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97	Maxwell Leasing
98	Maxwell Leasing
99	Maxwell Leasing
100	Maxwell Leasing

10 Click "Add Filter"

The screenshot shows the same CRM interface as before, but with the 'Filters' panel open. The panel displays 'Filter by Owner' set to 'All resident connections' and 'Stage equals Actively Working'. An orange circle highlights the 'Add Filter' button at the bottom of the panel. Below the highlighted button, there is a 'New Filter*' section with a dropdown arrow. The 'Add Filter Logic' section is also visible at the bottom.

Lead	Leasing Agent
1	Kourtnyee Baugus
2	Kourtnyee Baugus
3	Xavier Locke
4	Maxwell Leasing
5	Maxwell Leasing
6	Maxwell Leasing
7	Maxwell Leasing
8	Maxwell Leasing
9	Maxwell Leasing
10	Maxwell Leasing
11	Maxwell Leasing
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13	Maxwell Leasing
14	Maxwell Leasing
15	Maxwell Leasing
16	Maxwell Leasing
17	Maxwell Leasing
18	Maxwell Leasing
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96	Maxwell Leasing
97	Maxwell Leasing
98	Maxwell Leasing
99	Maxwell Leasing
100	Maxwell Leasing

11 Click "14+ Days Out"

Printable view | M3

Search this list...

Number	Market	Leasing Agent	Last ...	Lead Type
239-9620	Biloxi	Kourtnyee Baugus		
209-0471	Biloxi	Kourtnyee Baugus		
7600617	Charlotte	Xavier Locke		
8048433	Charlotte	Max		
6492903	Charlotte	Max		
3197037	Charlotte	Max		
6082125	Charlotte	Max		
73017887	Charlotte	Max		
7377209	Charlotte	Max		
6802768	Charlotte	Max		
2719587	Charlotte	Max		
5848120	Charlotte	Max		
7438253	Charlotte	Max		

Field: 14+ Days Out

Operator: equals

Value: True False

Cancel

Filter by Owner
All resident connections

Matching all of these filters

Stage
equals
Actively Working

New Filter*

Add Filter

Add Filter Logic

Done

12 Type "owner first name enter"

13 Click the "Value" field.

600617	Charlotte	Xavier Locke	▼
048433	Charlotte	Max	▼
492903	Charlotte	Max	▼
197037	Charlotte	Max	▼
082125	Charlotte	Max	▼
017887	Charlotte	Max	▼
377209	Charlotte	Max	▼
802768	Charlotte	Max	▼
719587	Charlotte	Max	▼
848120	Charlotte	Max	▼
438253	Charlotte	Max	▼
237-6770	Charlotte	Chelsey Lambert	▼
21065	Atlanta 2		▼
23021	Archive		▼
7373	Oklahoma	Ashley Sawyer	▼
36527	Fort Worth		▼

Field

Owner First Name ▼

Operator

equals ▼

Value

|

Done

All resident connections

Matching all of these filters

Stage equals Actively Working

New Filter*

Add Filter

Add Filter Logic

14 Type Reps name

15 Click "Done"

Owner First Name

Operator

Value

Freda

Done

Stage equals Actively Working

New Filter*

Add Filter Remove All

Add Filter Logic

otte	Max	
otte	Max	
otte	Max	
otte	Max	
otte	Max	
otte	Max	
otte	Max	
otte	Max	
otte	Max	
otte	Max	
otte	Chelsey Lambert	
ta 2		
ve		
oma	Ashley Sawyer	
North		
North		
North		

16 Click "Save"

anies

Printable View Mass Reassign Owner

Search this list...

et	Leasing Agent	Last ...	Lead Type
	Kourtnyee Baugus		
	Kourtnyee Baugus		
otte	Xavier Locke		
otte	Maxwell Leasing		
otte	Maxwell Leasing		
otte	Maxwell Leasing		
otte	Maxwell Leasing		
otte	Maxwell Leasing		
otte	Maxwell Leasing		
otte	Maxwell Leasing		