



LIST BROWSE

IMPLEMENTATION GUIDE



TO A **FINISH**

LIST BROWSE FOR SALESFORCE

Implementation Guide

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List Browse Introduction and Philosophy

This chapter introduces the user to Salesforce.com, the To A Finish organization and the List Browse app

This brief manual is an introduction to List Browse and the philosophy behind this popular app. For those eager to get going, the first chapter can be skipped in favor of a quick implementation of the List Browse App.

ICON KEY

 Details You Can Skip

 Don't Miss This!

 Sample Code

 Danger!

To succeed in configuring and installing List Browse you will need to pay close attention to all of the information contained in this manual, especially Chapter 2.

The Icon Key to the left shows the icons you will be seeing as you go through this manual. The more advanced readers can skip some of the details as indicated by the appropriate icon.

This manual is a work in progress, so please do take notes and let us know if you run into any issues with the text or if you believe there is a better way to accomplish the tasks we describe.

Introducing Salesforce.com



Salesforce.com's CRM solution is broken down into several broad categories: Sales Cloud, Service Cloud, Data Cloud (including Jigsaw), Collaboration Cloud (including Chatter) and Custom Cloud (including Force.com). Below, we'll highlight a few of them.

The Sales Cloud

The Sales Cloud includes a real-time sales collaborative tool called Chatter, provides sales representatives with a customer profile and account history, allows the user to manage marketing campaign spending and performance across a variety of channels from a single application, tracks opportunity-related data including milestones, decision makers, customer communications, and other information unique to the company's sales process. Automatic email reminders can be scheduled to keep teams up to date.



Other activities on the Salesforce cloud include using the Jigsaw business data to access business contacts, and designing and automating processes in Salesforce CRM.

The Service Cloud

The Service Cloud provides companies with a call center-like view that enables them to create and track cases coming in, and automatically route and escalate what's important. The Salesforce CRM-powered customer portal provides customers the ability to track their own cases, includes a social networking plug-in that enables the user to join the conversation about their company on social networking websites, provides analytical tools and other services including email, chat, Google search, and access to customers' entitlement and contracts.

The Force.com Platform

Salesforce.com's platform as a service (PaaS) product is known as Force.com. The Force.com platform allows external developers to create add-on applications that integrate into the main salesforce.com application and are hosted on Salesforce.com's infrastructure.

These applications are built using Apex (a proprietary Java-like programming language for Force.com) and Visualforce (an XML-like syntax for building user interfaces in HTML or Flex).

You can continue reading more on Salesforce.com at Wikipedia.com.

Introducing To A Finish



To A Finish™ is a concept company that has grown out of a desire to improve the Salesforce CRM consulting industry. Too often we have found the priorities of consulting companies skewed towards speed and profitability, rather than excellence and long-term success. This is not a blanket statement about all consulting companies, rather a general statement of the industry at large.

We believe there is a different way of consulting that will bring ultimate success to any CRM venture. The biggest difference is time. We give special attention to steps that are often rushed or even overlooked entirely in a typical project. Things like in-depth analysis, getting to really know a business, documentation and end-user involvement in the process help us set up a project for success. Ultimately, we must spend the time to do the work until it is absolutely complete; To A Finish™.

We are not guaranteeing our clients will never see a bug or have to rethink initial strategies. Reworking is actually part of the process of achieving success. What we are saying is that our strategies and focus will minimize unforeseen problems and achieve for us an ultimately successful project completion. We put our name on our work and stake our reputation on quality service.

Test us. Allow us to show you the difference of doing work To A Finish™.

You can find more about To A Finish at www.toafinish.com



TO A FINISH

When you finish a thing you ought to be able to say to yourself: "There, I am willing to stand for that piece of work. It is not pretty well done; it is done as well as I can do it; done to a complete finish. I will stand for that. I am willing to be judged by it."

- O.S. Marden

Introducing List Browse



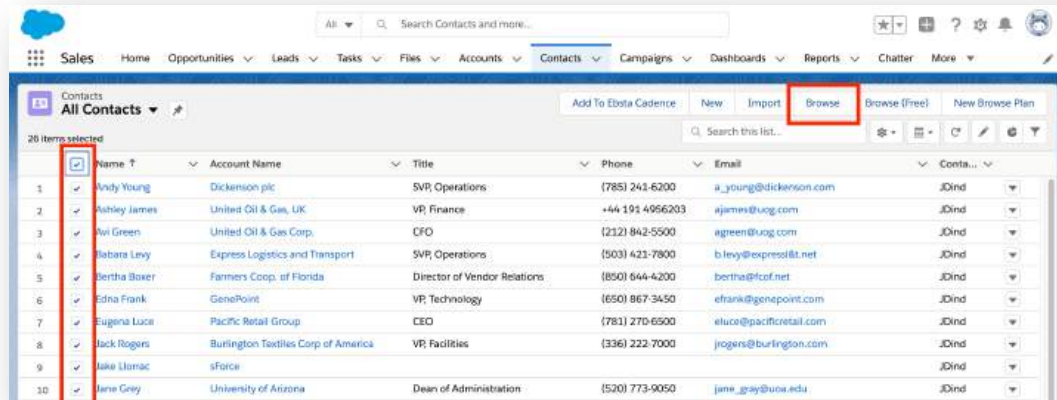
The philosophy behind the List Browse app is the ability to quickly browse data without requiring multiple screen changes.

With standard Salesforce.com configuration, in order to view two records on a list view, you must first click one record, and when finished go back in your browser and then click the other record. This is fine for two or three records, but when reviewing multiple records, it can get confusing and time consuming.

We have two different browse experiences for Classic, which are covered in a different document, and only one in Lightning.

Please note that as of January 1, 2026, our app is Free to use. We hope to build out additional functionality during 2026 so that going forward, there will be a paid and a free model, but as of now, all is free. Enjoy!

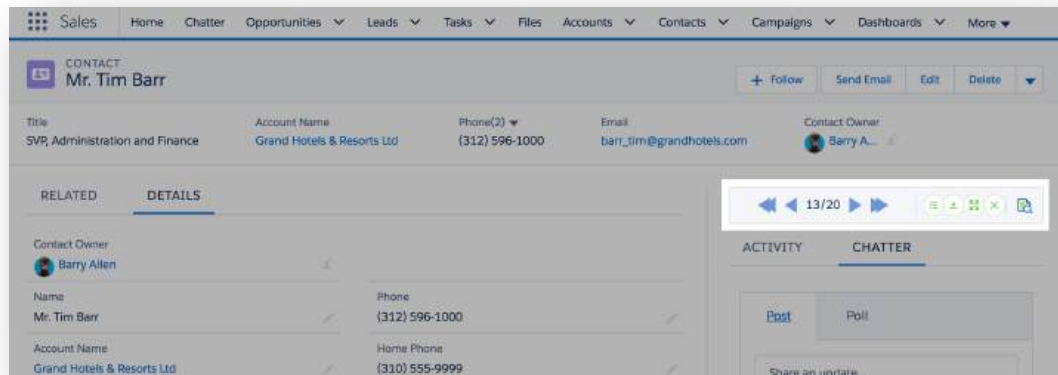
List Browse allows you to first **select the records** you want to browse, and click “Browse” to go to the first record.



Note that if you put it at the end of the Search Layout, it might be hidden in the "More" buttons.

Then, simply browse the selected records by moving forward (or back) through the list.

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A list of what each navigational element does is below. We trust that you will find these are simple controls that will give you back time in your day.

List Browse Control Guide

These are the simple controls you will learn to use and hopefully love.

Control	Description
	This control, and its contrary twin, will take you one record either before or after the current one on the list. If it is grayed out, that means you are on the first or last record.
	This control, and its opposite, takes you to the first or last record on your list. If it is grayed out, it means you are already there.
	This button will show you a list of any Browse Lists that you have previously saved in the current object. By clicking on the name of the list, you will switch to that list as the active Browse List (and lose the current active Browse List).
	This button will allow you to save the current active Browse List with a name of your choice in order to pull it up later.
	This button will show you a list of all the records in the current Browse List. It allows you to skip ahead or behind to any particular record by clicking on it.
	This button will clear the current active Browse List and take you out of List Browse for the current object until you again click the Browse button, OR it will simply close the browse element until you have clicked Browse again, depending on what you have configured in the Configuration page.

Before You Begin, Requirements



Before you begin working with List Browse, you must have several components already in place and configured. We will not cover these components in detail, but will at least point you to where you can get the information you need.

Licensing A production and/or sandbox system Salesforce.com Org will be needed in order to set up the integration. The following types of licenses are all supported:

- ☞ Sales Cloud
- ☞ Service Cloud
- ☞ Custom Cloud (Force.com)

Editions At the current time, only the following editions will support List Browse. The Group edition is not supported.

- ☞ Enterprise
- ☞ Unlimited and Up
- ☞ Developer
- ☞ Professional* (most functionality)

Lightning and My Domain

Please note that this app will absolutely need the My Domain feature to be turned on and activated for all users in order to use the standard version of List Browse. The reason for these requirements is that a Lightning Component is being installed as a part of the upgraded package.

For more information on the My Domain feature, see the Salesforce documentation:

https://help.salesforce.com/articleView?id=domain_name_overview.htm

Once you deploy “My Domain”, you cannot change it without contacting Salesforce support, so please be careful.

Installing and Configuring List Browse

In this chapter you will learn how to quickly install the app and then configure it for use in standard and custom objects

Several basic steps must be completed in order to install and configure List Browse in your Salesforce.com org, no matter which version you use. Any user with administrative skills should be able to install and configure the app.

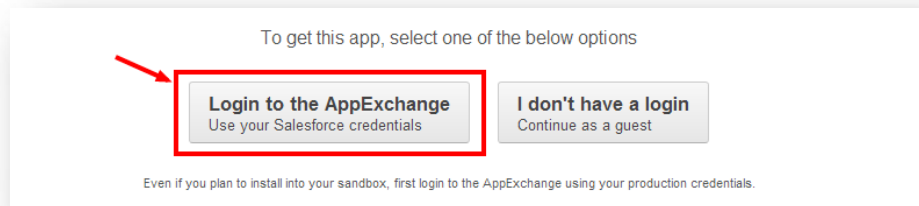
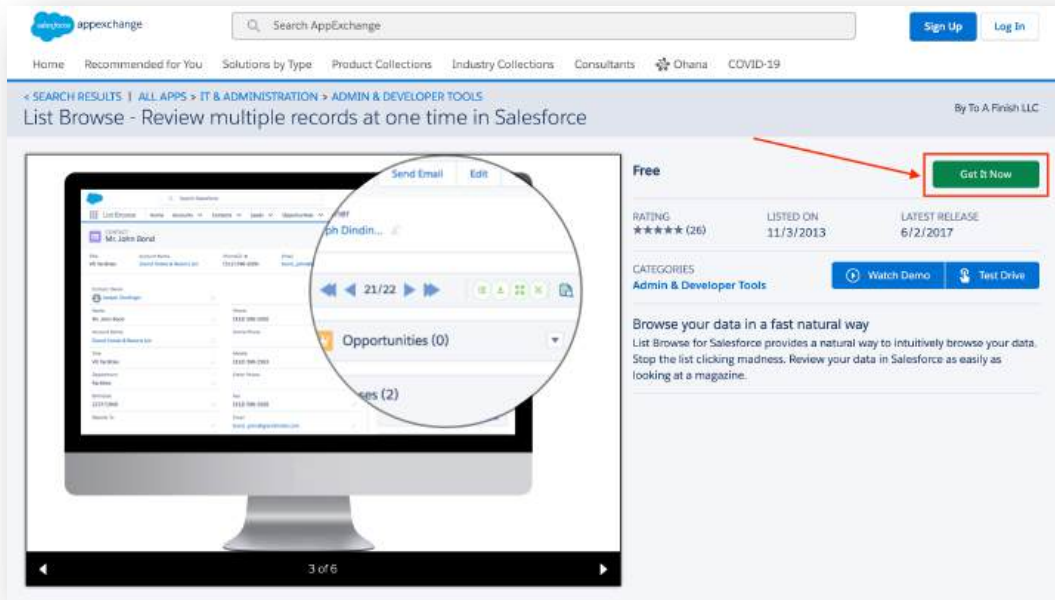
The main steps necessary to complete are listed below.

Step	Description
1	Install the List Browse app
2	Add the Browse button to the objects you want to browse
3	Create custom Browse buttons for any custom objects or other standard objects where it is needed
4	Add the Browse component to the Lightning Page
5	Leave List Browse a 5-Star Review on the AppExchange! 😊

Installing the List Browse App

The first step is to install the app from the AppExchange. You should be able to find the app easily by searching for “List Browse” on the AppExchange.com website.

Click on the **Get it Now** button on the listing and log in to the AppExchange using your Salesforce.com credentials (if you are not already).



Next, you will need to decide the type of Org you want to install the app into. You can try List Browse in a sandbox first, but generally speaking you should be able to install it into a Production system with no adverse effects. After selecting one, click the **I have read and agree to the terms and conditions** (you might want to look at those first) checkbox and then press the **Confirm and Install!** button.

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How would you like to continue?

 **Install in production**
Includes active, trial or developer orgs

 **Install in sandbox**
Test in a copy of your production org

Almost there!

WHAT YOU ARE INSTALLING	WHERE YOU ARE INSTALLING
PACKAGE List Browse	ORGANIZATION To A Finish LLC
VERSION List Browse (Bonghazi / 1.0.0)	EDITION Developer Edition
SUBSCRIPTION Free	USER NAME admin@toafinish.com
DURATION Does Not Expire	
NUMBER OF SUBSCRIBERS Site-wide	

☒ I have read and agree to the [terms and conditions](#).

[Cancel Install](#) | [Back to previous step](#) [Confirm and Install!](#)

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please click [here](#) for detailed information on what is and is not included in this review.

You will be asked to log in. Do so, and the installation will continue in your Org. After logging into the org you want to install into, go through the install process. The only important choice will be who to install for. Select **Install for all users** and press the **Install** button.

 **Install List Browse - Review multiple records at one time in Salesforce**
By To A Finish LLC

 ☐ Install for Admins Only	 ☒ Install for All Users	 ☐ Install for Specific Profiles...
--	---	---

[Install](#) [Cancel](#)

Configuring the List Browse App

Before you can use List Browse, you must simply add the **Browse** buttons to the six standard objects that are supported by default. The six objects that come standard are:

- ☞ Leads
- ☞ Accounts
- ☞ Contacts
- ☞ Opportunities
- ☞ Cases
- ☞ Tasks

Note For most versions of Salesforce, you can create a Browse button for other standard or custom objects as well as the standard ones. Doing that is covered in the next section.

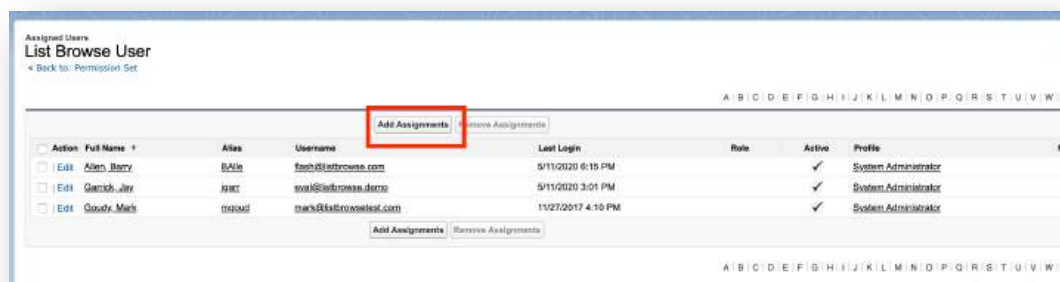
In order to add the Browse button, you must first go to the **Setup** section, by clicking the Gear Icon (shown to the right) in Lightning, or clicking your name at the top of the page and selecting Setup.



Permission Set Setup

In order to have access to List Browse, users will need to be granted the List Browse User permission set. In the Setup area go to Users → Permission Sets and then click on the **List Browse** permission set. (You will also need to do this for regular users with the **List Browse (NonAdmin)** permission set.)

Now, click the “Manage Assignments” button and add all the users who will be accessing List Browse to this permission set, including System Administrators.

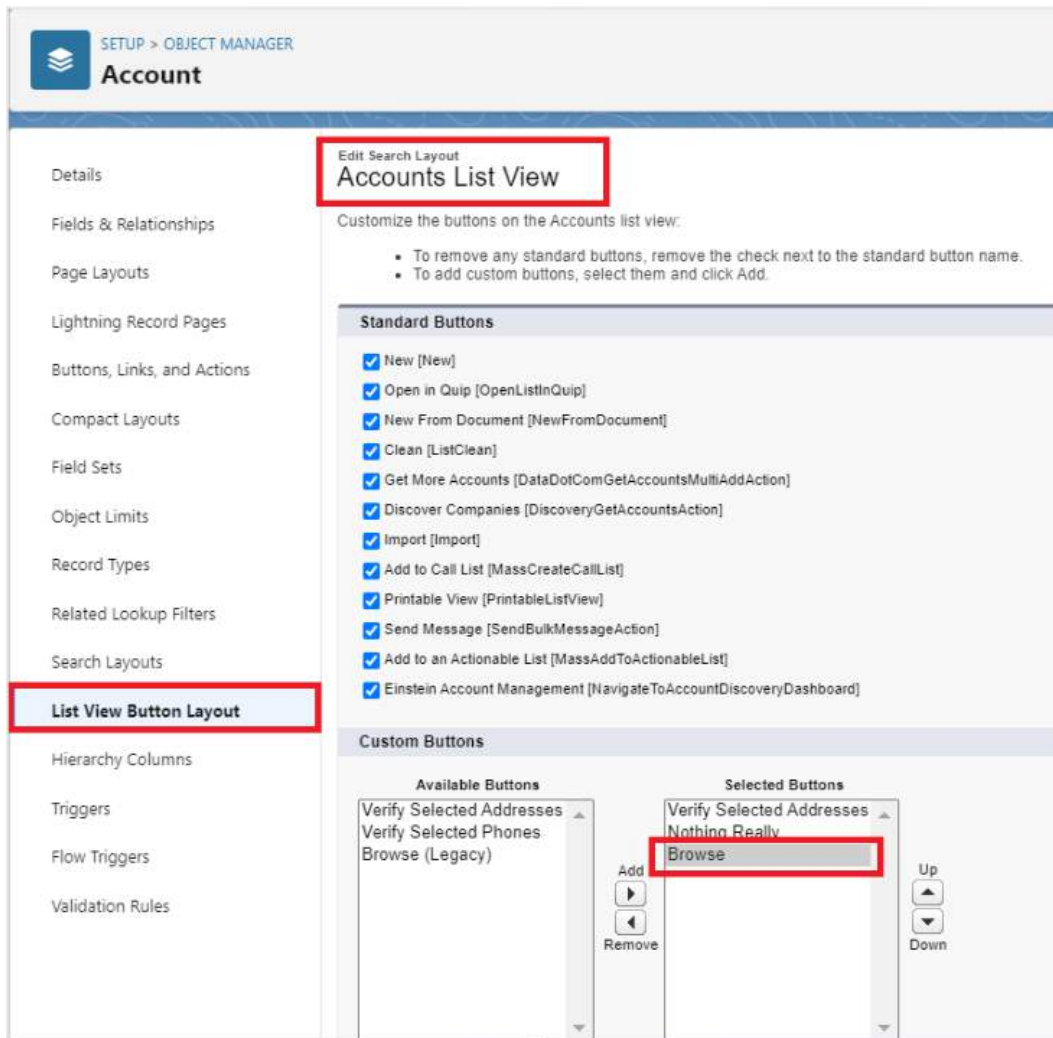


Now, you are ready to proceed.

Configuring the Browse Buttons

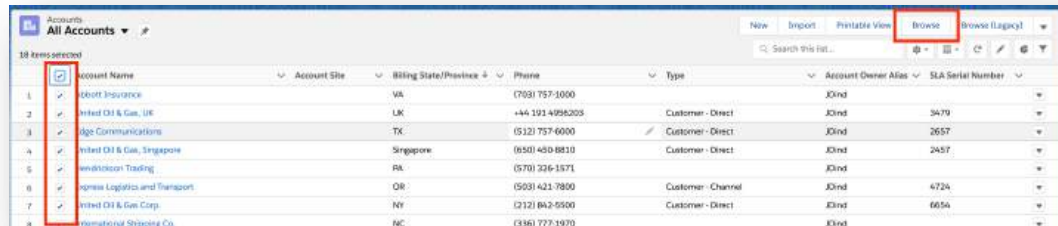
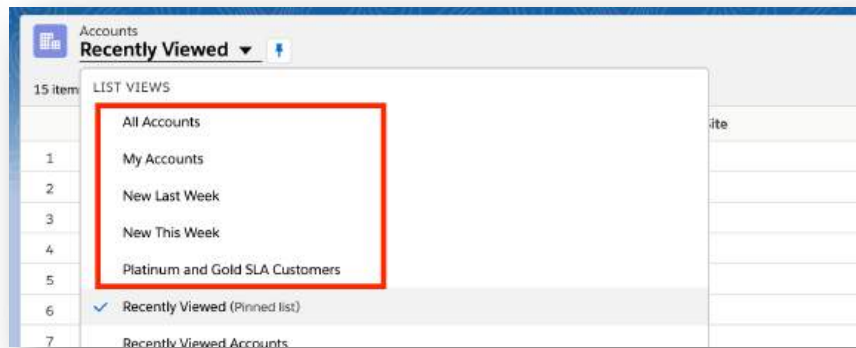
Once in the Setup section, click on the **Object Manager** tab and then search for the object you want to browse, this example uses the Account object (the free version only works with Accounts and Contacts).

Click on the object, and then on “List View Button Layout” and then Edit the “List View” item. Add “Browse” on the Selected Buttons.

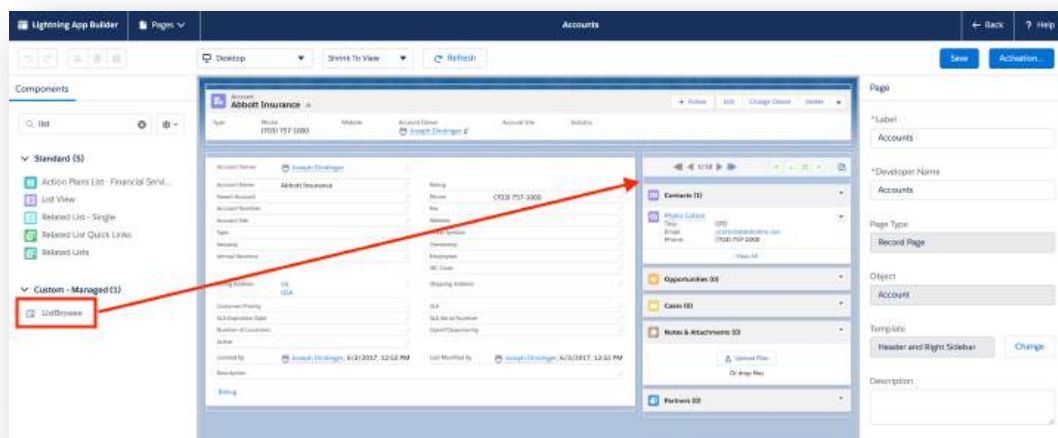


Save this page and back out of Setup. **Click on the tab** for the object you are setting up, in this example, Accounts. Now go to a list.

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Once you select records and press the Browse button, you are taken to the first record. Click the Gear Icon once again and this time select **Edit Page**. This will take you to the Lightning App Builder. From the “Custom - Managed” section on the left panel, drag the ListBrowse Component somewhere on the page.



Now, **Save** and if necessary, release the page to be the Org Default, or to as many profiles as you would like. When done, click the ← Back button and begin browsing your records.

You are now finished adding the Browse button to all the Leads list views. You may now repeat the process for the Accounts, Contacts, Opportunities and Cases in order to add the Browse button to those objects as well. If you selected the “Browse (Legacy)” button, that is all you need. If you are using the newer “Browse” button, keep reading.

If you want to expand List Browse to use it in objects outside of Opportunities, Accounts, Contacts and Leads, please follow the instructions in the next chapter.

Known Issues

At this point in our development cycle, List Browse is very stable. However, a list of known issues will be kept on this page:

- 1) Certain lists will break the “Browse” button. These lists have non-standard features which break the underlying Salesforce commands that our application uses in order to detect which records have been selected. We hope that the bug will be fixed in a future Salesforce version, but until then, you might run into an error similar to this one when you try to Browse:

```
core.apexpages.exceptions.ApexPagesHandledException: Object
type not accessible. Please check permissions and make sure
the object is not in development mode: and (Subject LIKE
%something%)) ) ORDER BY Subject ASC ^ ERROR at
Row:4:Column:18 line 4:18 no viable alternative at
character '%'. Original queryString was: '.....'
```

- a. The only solution to this type of error is to revise the filters. We have seen that the “greater than” or “lesser than” filters are usually to blame. For example if you say that a field is greater than “blank” it will break. This one is easy to fix, as you can change it to say that the field is not “blank” for the same effect, and this will not break the code.

Advanced Configuration

In this chapter you will learn how to quickly configure List Browse for usage in Lightning

Several basic steps must be completed in order to install and configure List Browse in your Salesforce.com org. Any user with administrative skills should be able to install and configure the app.

The main steps necessary to complete are listed below.

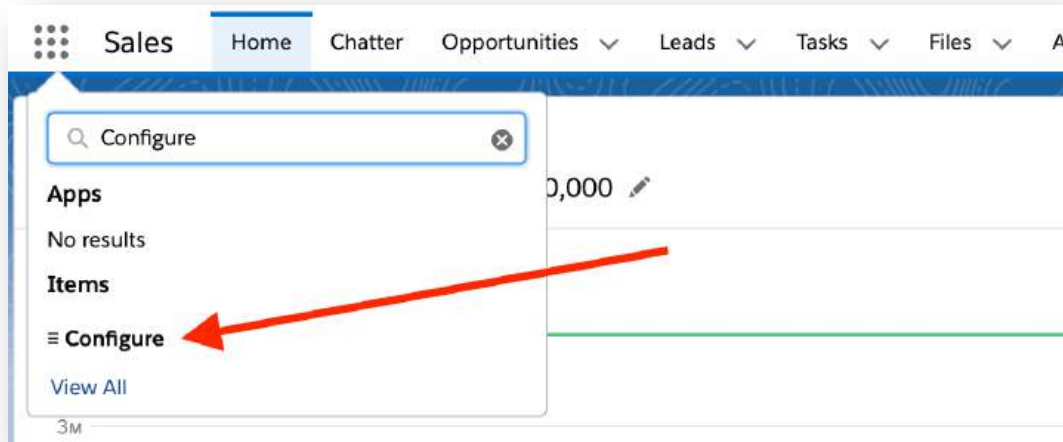
Step	Description
1	Install and Configure List Browse as shown in chapter 2.
3	Add the Browse button to any of the 6 standard objects which come with the app
4	Create custom Lightning pages or modify existing custom ones to add the List Browse lightning component.
5	Leave List Browse a 5-Star Review on the AppExchange! ☺

Note: Before going on, you must first install the List Browse app as shown in the previous chapter.

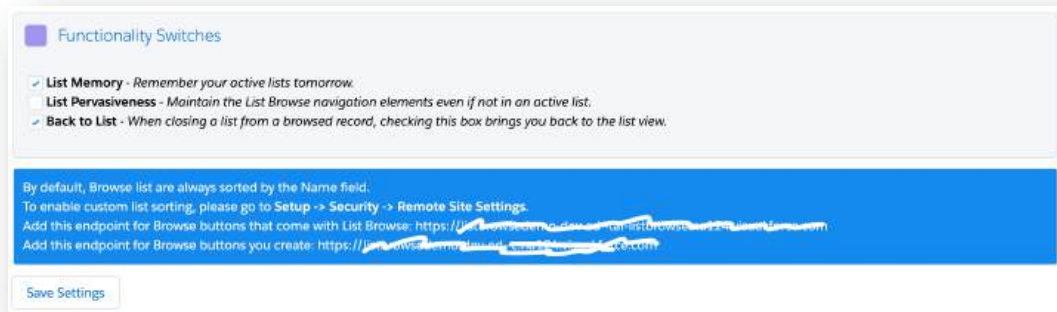
Note: The “My Domain” feature in Salesforce must be enabled and deployed to users before you can use the Lightning version. The reason is that it includes a Lightning Component, and My Domain is necessary for Lightning Components.

List Browse Configuration Page

To configure how List Browse works, you will want to go to the List Browse Configuration page by going to Setup → Installed Applications → List Browse → Configure. Or, you can also click the apps icon on the top-left of the page and search for “Configure” to go to the Configure page directly, or “List Browse” to go to the App.



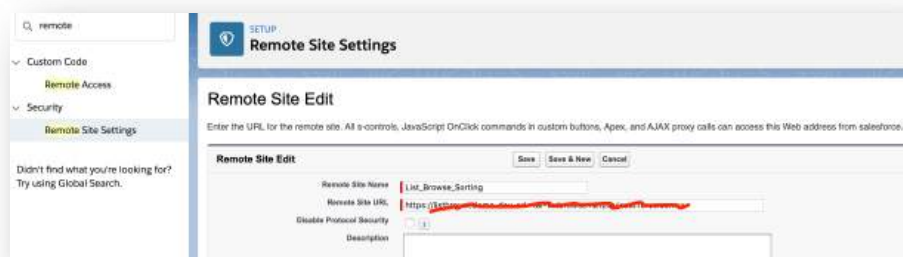
Once on the page, there are a few things you can configure:



1. Enable **List Memory** in order to “remember” your active Browse Lists from day to day. Without this, you may have to start over each day.
2. Enable **List Pervasiveness** in order to always have the List Browse component visible on the page, whether the current record is being browsed or not. Without this checked, if the “X” button is pressed, the List Browse component will disappear until you press the Browse button again.

3. Enable **Back to List** to send the user back to the List view when they press the “X” button on the navigation. Without this checked, pressing the “X” will merely delete the active list and leave the user on the current record.

This page will also instruct the user to add remote sites to the Salesforce org in order to sort the Browse Lists according to what the user sees on the screen. The sites given in the instructions are merely the current org’s own URLs, but they are needed in order to use the tooling API to find the sorting of the list. If the given sites are not added to the list of remote sites as described, then all List Browse sessions will sort on the Name field, regardless of how the list was sorted.



To add the remote sites go to Setup → Security → Remote Site Settings click the **New** button to add a site. Once you add both sites, refresh the Configuration page and you should see the messages disappear.

Adding List Browse to More Objects

Besides the five standard objects that come with the app, you can Browse virtually any other object. To do so, go to Setup → Custom Code → Visualforce Pages, and press the **New** button to create a Visualforce page that will be used by the "Browse" button. Simply copy the code below into a new Visualforce page, changing the highlighted area with the API name of the object you choose. (When saving, select the option so that it will be available in Lightning):

Custom “Browse Button” Visualforce Page

```
<apex:page
    standardController="MyObject__c"
    recordSetVar="myrecords"
    extensions="taf_listbrowse.PassSelectedRecordsExt"
    showHeader="false"
    action="{!createListRecord}">
</apex:page>
```

You can also find the above code in the “pages” folder in our GitHub Repository.

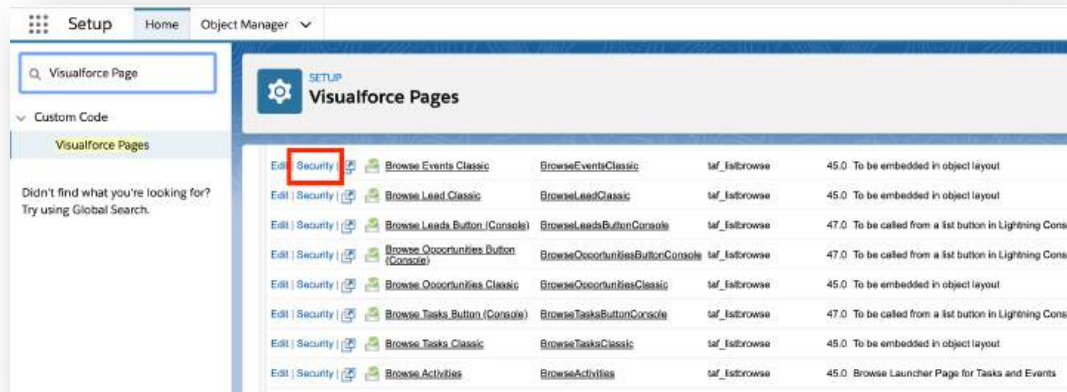
GitHub.com List Browse Sample Code Repository

<https://github.com/ToAFinish/listbrowse>



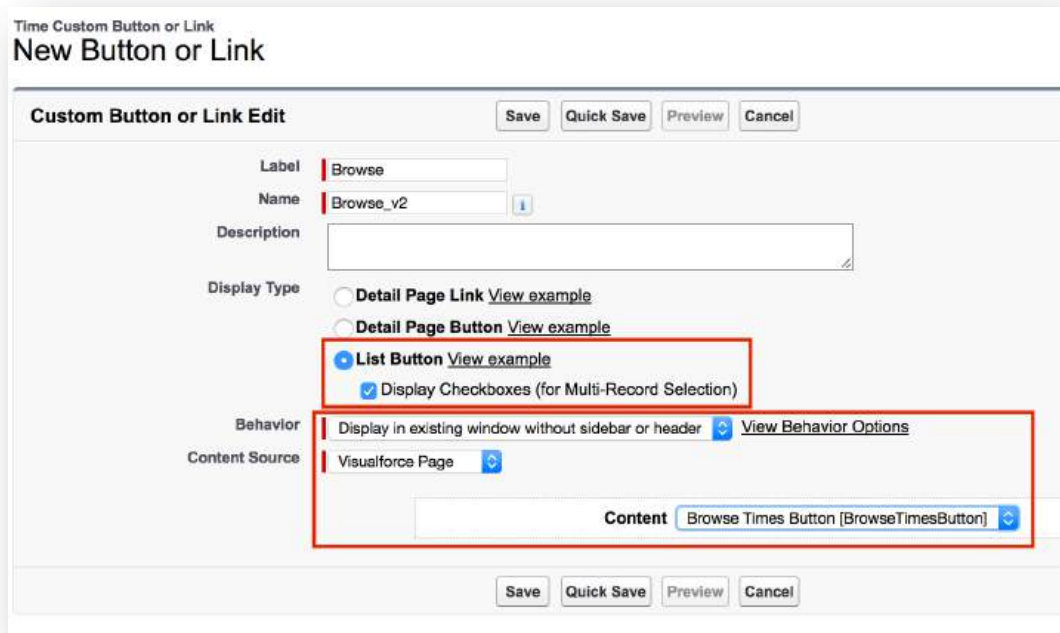
Next, you will need to modify the Security of this new page if you want anybody besides a System Administrator to be able to use them. Simply click on the **Security** link next to the page name when looking at your list of Visualforce pages, and select which profiles should have access to it.

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Note: if you do not update the Security of your page, your non-Admin users will get an error saying they have insufficient access.

Now, you must add a button for your selected object that uses the “Browse Button” Visualforce page you created above. The options needed are shown below, but the screen will look a little different, depending on the object you selected to add to.



Finally, you need to do the steps referenced in the prior chapter, titled “Configuring the Browse Buttons” to add the button and embed the page for the object you are extending List Browse into. Good luck!

Feedback and Support Access

Please send us your feedback to support@toafinish.com, and don't hesitate to email if you have questions about these instructions. When you do, you might want to give us remote access, as shown in the screenshot below, so that we can log in as you to see the problem.

Grant Account Login Access

To assist with support issues, you may grant your administrator or support personnel the ability to login as you and access your data.

My Username: joseph@toafinish.com

Grant Access To	Access Duration
Your Company's Administrator	225 day(s) left. Expires on 11/24/2015. Change
Salesforce.com Support	--No Access--
CRMCulture, LLC Support	--No Access--
Emma Support	--No Access--
Salesforce.com Foundation Support	--No Access--
TOAFinish Support	--No Access--
uStudio Inc. Support	--No Access--

[Save](#) [Cancel](#)

Rating List Browse

We greatly enjoy being able to provide users with an app they will find useful. So, if you like the app, please leave us a positive review on the AppExchange:

<https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B3fZEAR>

But if you run into issues, *please* don't leave them there for the world to see (unless we can't get it resolved). Rather, contact us at support@toafinish.com and we'll work together to make this app To A Finish™.

Thank you!

The To A Finish™ team.