salesforce

Learn Salesforce Basics

Salesforce, Winter '16

CONTENTS

LEARN SALESFORCE BASICS

Welcome, Salesforce Users

Welcome to Salesforce! This documentation, designed for users and administrators, introduces Salesforce and its key concepts, provides an overview of products and editions, and guides you through setting yourself up as a user. You'll also find information about common tasks you'll perform in Salesforce—like using basic Chatter features, running reports, or searching Salesforce for the information or records you need.

To learn how to log in and personalize Salesforce, see Getting Started as a New User.

Get to Know Salesforce Products

What's New in Salesforce?

Current Release

Learn about the newest features for sales, support, marketing, and Chatter users, as well as enhancements to the platform. You can also visit the Winter '16 community page.

Our release notes include complete details about new features, as well as implementation tips and best practices.

- Winter '16 Release Notes
- Salesforce for Outlook Release Notes
- Force.com Connect for Office Release Notes
- Force.com Connect Offline Release Notes

Past Releases

Our archive of release notes includes details about features we introduced in previous releases.

- Summer '15 Release Notes
- Spring '15 Release Notes
- Winter '15 Release Notes
- Summer '14 Release Notes
- Spring '14 Release Notes
- Winter '14 Release Notes
- Summer '13 Release Notes
- Spring '13 Release Notes
- Winter '13 Release Notes
- Summer '12 Release Notes

- Spring '12 Release Notes
- Winter '12 Release Notes
- Summer '11 Release Notes
- Spring '11 Release Notes
- Winter '11 Release Notes
- Summer '10 Release Notes
- Spring '10 Release Notes
- Winter '10 Release Notes
- Summer '09 Release Notes
- Spring '09 Release Notes
- Winter '09 Release Notes
- Summer '08 Release Notes
- Spring '08 Release Notes
- Winter '08 Release Notes
- Summer '07 Release Notes
- Spring '07 Release Notes
- Force.com Mobile 7.0 for BlackBerry Release Notes
- Force.com Mobile 6.1 for Windows Mobile 5 Release Notes
- Winter '07 Release Notes
- Summer '06 Release Notes
- Winter '06 Release Notes
- Force.com Mobile 6.0 Release Notes
- Summer '05 Release Notes
- Winter '05 Release Notes
- Summer '04 Release Notes

Salesforce Overview

Welcome to the award-winning cloud-computing service—designed to help you manage your customer relationships, integrate with other systems, and build your own applications. Salesforce includes the following products and services.

Salesforce Applications

Salesforce includes prebuilt applications (or "apps") for customer relationship management (CRM) ranging from sales force automation to partner relationship management, marketing, and customer service.

Force.com Platform

The Force.com platform is the first platform as a service (PaaS), enabling developers to create and deliver any kind of business application entirely on demand and without software. The platform also includes easy to use point-and-click customization tools to help you create solutions for your unique business requirements, without any programming experience.

EDITIONS

Available in: Salesforce Classic

Your Salesforce edition determines which features and functionality you can access. To find out which edition you're using, look at the browser tab or title.

Database.com

    Database.com is a multitenant cloud database service that's designed to store data for mobile, social enterprise applications. You can use Database.com as the back-end database for applications that are written in any language and run on any platform or mobile device. Database.com's built-in social computing infrastructure and native support for building sophisticated REST-based APIs enable you to create employee-facing, native mobile and social apps.

AppExchange

    AppExchange is a marketplace featuring hundreds of cloud applications created by Salesforce customers, developers, and partners. Many of the applications are free and all of them are pre-integrated with Salesforce, enabling you to easily and efficiently add functionality.

Salesforce.com Community

    Salesforce provides training, support, consulting, events, best practices, and discussion boards to help you be successful. Visit Salesforce.com Community.

Key Concepts and Terms

As you're getting up to speed with Salesforce, it's helpful to learn some key concepts and terms. They'll come up frequently as you interact with the product, our documentation, and our service professionals. The concepts here will help you understand how Salesforce works. And the terms will help you understand some of its main components.

EDITIONS

Available in: Salesforce Classic

Available in: **All Editions**

Concepts

Concept	Definition
Cloud	A Salesforce name for a loose federation of features that help you accomplish certain types activities, such as selling products, supporting your customers, or collaborating with your coworkers. Two common examples you'll come across are *Service Cloud* and *Sales Cloud*.
Cloud Computing	Technology that enables Internet-based services that let you sign up and log in through a browser. Salesforce delivers its service in the cloud. Other familiar cloud computing services include Google Apps and Amazon.com.
Software as a Service (SaaS)	Software delivered not by traditional means (such as on disk) but in the cloud, as a service. There's nothing to download or install, and updates are automatic.
Trust	A Salesforce term for its company-wide commitment to building and delivering the most secure, fast, and reliable cloud-based service available.
	Created to enhance customer success, `trust.salesforce.com` is a systems status website giving Salesforce customers and the community access to real-time and historical system performance information and updates, incident reports and maintenance schedules across all its key system components.
	`trust.salesforce.com` is free to all members of the Salesforce community.

Terms

Term	Definition
App	Short for *application*. A collection of components such as tabs, reports, dashboards, and Visualforce pages that address specific business needs. Salesforce provides standard apps, which you can customize, such as Sales and Call Center. You can customize the standard apps to match the way you work.
Edition	One of several bundles of Salesforce products and services, each geared toward a different set of business needs. All Salesforce editions share the same look and feel, but they vary by feature, functionality, and pricing.
Object	A definition of a specific type of information you can store in Salesforce. For example, the Case object lets you store information about customer inquiries. For each object, your organization will have multiple, specific records.
	Salesforce comes with lots of standard objects, but you can create custom objects, as well.
Organization	A deployment of Salesforce that has a defined set of licensed users. Your organization includes all of your data and applications.
Record	A collection of fields that store information about a specific item of a specific type (represented by an object), such as a contact, an account, or an opportunity. For example, you might have a contact record to store information about Joe Smith, and a case record store information about his training inquiry.
Release	Salesforce releases new products and features three times per year, and releases are identified by season—Winter, Spring, and Summer—along with the calendar year. *Example:* Winter '15.
	For every Salesforce release, the Salesforce release notes include new features and products that are generally available or in beta release, plus all changes to existing features and products. You can find the release notes when you search for "Release Notes" in the Salesforce Help.
Salesforce	The name of the Salesforce cloud computing CRM service.
Salesforce	The company name.

Editions

Salesforce Edition Overview

Salesforce offers several bundles of its products and services, each geared toward a different set of business needs.

These bundles, called *editions*, all share the same look and feel, but they vary by feature, functionality, and pricing. For example, a feature that is available in Professional Edition for an additional fee may be included in Enterprise Edition. You might choose to start with a more basic edition, then upgrade later as you grow your business.

For a comparison chart of editions and their features, see the Salesforce Pricing and Editions page.

EDITIONS

Available in: Salesforce Classic

Your Salesforce edition determines which features and functionality you can access. To find out which edition you're using, look at the browser tab or title.

> 📝 **Note:** The Salesforce Help describes all generally available features, including those that are not available in all editions. To find out whether a feature is available in your edition: search for the feature in the help, then check out the "Available in:" table at the top of any topic you find for that feature.

SEE ALSO:

  [Salesforce Mobile Products Overview](#)

Contact Manager Edition

Salesforce Contact Manager is designed for small businesses and provides access to key contact management features including accounts, contacts, activities, calendars, notes and attachments, and reports. Contact Manager also provides straightforward and easy-to-use customization options. For more information about Contact Manager features, visit the [Salesforce Pricing & Editions page](#).

> 📝 **Note:** Lightning Experience isn't available in the Contact Manager Edition.

SEE ALSO:

  [Salesforce Edition Overview](#)

Group Edition

Salesforce Group Edition is designed for small businesses and workgroups with a limited number of users. Group Edition users can manage their customers from the start of the sales cycle through closing the deal to providing customer support and service. Group Edition offers access to accounts, contacts, opportunities, leads, cases, dashboards (read only), and reports. For more information about Group Edition features, visit the [Salesforce Pricing & Editions page](#).

SEE ALSO:

  [Salesforce Edition Overview](#)

Developer Edition

Developer Edition provides access to the Force.com platform and API. It allows developers to extend the Salesforce system, integrate with other applications, and develop new tools and applications. Developer Edition provides access to many of the features available with [Enterprise Edition](#).

Salesforce does not provide technical support for Developer Edition. You can solicit help from the developer community message boards available to registered users via the Force.com developer website - [developer.salesforce.com](#). Documentation for Developer Edition is available from the [Technical Library](#).

SEE ALSO:

  [Salesforce Edition Overview](#)

Personal Edition

> 📝 **Note:** Personal Edition isn't available to new organizations. Existing organizations that have already set up Personal Edition continue to have access. In addition, Personal Edition organizations that signed up after June 2009 don't have access to opportunities.

Personal Edition is a CRM solution designed for an individual sales representative or other single user. Personal Edition provides access to key contact management features such as accounts, contacts, and synchronization with Microsoft Outlook®. It also provides sales representatives with sales tools such as opportunities.

> **Note:** Lightning Experience isn't available in the Personal Edition.

SEE ALSO:

    Salesforce Edition Overview

Professional Edition

Salesforce Professional Edition is designed for businesses who need full-featured CRM functionality. Professional Edition includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small- to mid-sized deployment. For more information about Professional Edition features, visit the Salesforce Pricing & Editions page.

SEE ALSO:

    Salesforce Edition Overview

    Expansion Pack and Unlimited Apps Pack

Enterprise Edition

Salesforce Enterprise Edition is designed to meet the needs of large and complex businesses. In addition to all of the functionality available in Professional Edition, Enterprise Edition organizations get advanced customization and administration tools that can support large-scale deployments. Enterprise Edition also includes access to the Web services API so you can easily integrate with back-office systems. For more information about Enterprise Edition features, visit the Salesforce Pricing & Editions page.

SEE ALSO:

    Salesforce Edition Overview

    Expansion Pack and Unlimited Apps Pack

Unlimited Edition

Salesforce Unlimited Edition is Salesforce's solution for maximizing your success and extending that success across the entire enterprise through the Force.com platform. Unlimited Edition customers benefit from new levels of platform flexibility for managing and sharing all of their information on demand.

Unlimited Edition includes all Enterprise Edition functionality plus Premier Support, full mobile access, unlimited custom apps, increased storage limits, and more. For more information about Unlimited Edition features, visit the Salesforce Pricing & Editions page.

SEE ALSO:

    Salesforce Edition Overview

Performance Edition

Performance Edition is Salesforce's solution that combines CRM and the Force.com platform with Data.com, Work.com, Identity, Live Agent, Salesforce Knowledge, and additional sandbox functionality.

Performance Edition is designed for customers that need to drive amazing growth, achieve new levels of customer satisfaction, and maximize sales and service success in the social and mobile world. Performance Edition includes all Unlimited Edition functionality plus clean, targeted lead and customer data from Data.com, coaching and feedback tools from Work.com, trusted identity services from Identity, and more. For customers in Japan, Singapore, and South Korea, we offer Performance Edition Limited, which includes all Performance Edition functionality except Data.com. For more information about Performance Edition features, visit the Salesforce Pricing & Editions page.

SEE ALSO:

> Salesforce Edition Overview

Database.com Edition

Database.com Edition

Database.com is a multitenant cloud database service that's designed to store data for mobile, social enterprise applications. You can use Database.com as the back-end database for applications that are written in any language and run on any platform or mobile device. Database.com's built-in social computing infrastructure and native support for building sophisticated REST-based APIs enable you to create employee-facing, native mobile and social apps.

As a Salesforce user, you're already using Database.com when you're performing tasks such as creating custom objects, managing security, or importing data with the Force.com platform and API.

A standalone version of Database.com is available for developers who want to create applications that leverage other languages, platforms, and devices.

There is no Database.com-specific documentation. Instead, you use the Salesforce documentation and a list of features that Database.com supports. This list identifies the Salesforce documentation subjects that apply to Database.com. Also, every feature's Edition Table includes Database.com if the feature is available in Database.com. Use the Salesforce online help, release notes, workbooks, and developer guides for APIs, Apex, SOQL, and SOSL.

> ✏️ **Note:** Lightning Experience isn't available in the Database.com Edition.

SEE ALSO:

> Salesforce Edition Overview

Database.com Feature List

The list of Salesforce features also available in Database.com. Use this list in combination with the feature Edition tables to find topics in the Salesforce help that also apply to Database.com.

The Salesforce features listed here are those that are also available in Database.com. The features are organized by general product area. Some features are only available through the API. These are noted where they appear.

Administration

- Audit Trail
- Company Information
- Delegated Administrator and Login As
- Enhanced Profile Management

- Field-Level Security
- Login History
- Mass Transfers
- New Profile UI
- Permission Sets
- Profiles

Apex (Libraries are available only for features supported in Database.com.)

API

- API Clients
- Bulk API
- Data Loader
- Metadata API
- Chatter REST API
- Web Services API Data Replication
- Web Services API Reads
- Web Services API Writes

Application Lifecycle Management

- Change Sets

Chatter

- Ability to stop following records that you own in Chatter
- At Mentions (API only)
- Chatter Activity and Influence
- Customize Chatter settings
- Feed Tracking
- Feeds
- Files (API only)
- Group Layouts
- Group Trigger and Group Member Triggers
- Groups
- Hashtags and Topics
- Quick Actions
- Rich Link Previews in Feed
- Triggers for Feed Comments and Feed Items

Content

Custom Settings

Customer Domains

Data

- Ability to mass transfer records of custom objects
- Data Loader

Declarative App Builder and Custom Schema

Custom Objects and Fields

- Force.com
- Formula Fields
- Rich Text Area
- Roll-up Summary Fields
- Validation Rules

Developer Tools

- Force.com IDE

Divisions

Enhanced Profile User Interface

- Enabling
- Field Level Security
- Field/Object Perms
- Object and Tab settings – Objects only
- Search
- System Perms
- Viewing and editing app perms
- Viewing and editing Login Hours
- Viewing and editing Login IP Ranges
- Viewing and editing Service Provider Access
- Viewing Profile Lists

Field Accessibility (for custom objects)

Field Dependency Matrix

Fileforce

Localization and Globalization

- Multi-Currency
- Timezones

My Personal Information

- Change My Password
- Editing personal information
- Granting Login Access (Send Activation Link button)

Offline

- Force.com Flex Desktop applications
- Force.com Flex Web applications

Permission Sets

- Ability to search permissions
- Viewing, Editing, and Creating

Profile List Views

- Creating

- Editing

Restricting Logins

- Hours and IP Ranges on Profiles

Sandbox

- Developer Sandbox (for an additional fee)

- Full Copy Sandbox (for an additional fee)

- Setup Only Sandbox (for an additional fee)

Search

- Personal Tags

- Public Tags

Security

- Connected Apps (OAuth)

- Encrypted Custom Fields

- General Security

- Identity Feature

- Inbound Single Sign-On

- Password and Login Policies

- Retrieving forgotten passwords

Single Sign-On

Sharing

- Apex Managed Sharing

- Criteria Based Sharing Rules

- High Volume Portal User

- Ownership Based Sharing Rules

- Public Groups

- Queues

- Role Hierarchy

- Sharing Model and Manual Sharing

Topics

- Topic and TopicAssignment Triggers

User Setup

- Creating and editing Personal and Public Groups

- Send Activation Link

Users

- Expiring Passwords

- Manage Users

- Managing Roles
- Monitoring User Events (logins and training)
- Resetting Passwords
- Role Fields
- Role List page
- Set Up Password Expiration
- Setting Login Restrictions

Viewing the Public Group Related List

Weekly Export

Workflow

- Outbound messages (as both immediate and time-dependent actions)
- Time-Based Workflow (Workflow Queue)
- Workflow Field Updates and Outbound Messages
- Workflow rules

Expansion Pack and Unlimited Apps Pack

Expansion Pack for Professional Edition

For Professional Edition, you can purchase Expansion Pack units to increase app, tab, and object limits. Each Expansion Pack unit corresponds to a user license in your organization.

Unlimited Apps Pack for Enterprise Edition

For Enterprise Edition, you can purchase Unlimited Apps Pack units to increase app, tab, and object limits, as well as the maximum number of API calls and data storage capacity. Each Unlimited Apps Pack unit corresponds to a user license in your organization.

Adding Pack Units

Expansion pack and Unlimited Apps Pack units are available for Sales Cloud, Service Cloud, Force.com, and Site.com-Only users. An organization can be upgraded only once with Expansion Pack or Unlimited Apps Pack. If your organization needs higher app limits than what the pack provides, we recommend upgrading your organization's edition. To add Expansion Pack or Unlimited Apps Pack units, contact your Salesforce representative.

Salesforce Mobile Products Overview

Salesforce provides several mobile apps to keep you connected and productive, no matter where you are.

Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
Salesforce1	Access and update Salesforce data from an interface that's optimized for navigating and	Free for customers using: - Contact Manager Edition	- Android phones - Android tablets (mobile browser app only)	Yes, for viewing data.

Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
	working on your touchscreen mobile device. You can view, edit, and create records, manage your activities, view your dashboards and reports, and use Chatter. Salesforce1 supports many standard objects and list views, all of your organization's custom objects, the integration of other mobile apps, and many of your organization's Salesforce customizations, including Visualforce tabs and pages.	• Personal Edition • Group Edition • Professional Edition • Enterprise Edition • Unlimited Edition • Performance Edition • Developer Edition	• Apple iPad • Apple iPhone • Windows 8.1 phones (mobile browser app only)	
SalesforceA	Manage users and view information for Salesforce organizations from your smartphone. Deactivate or freeze users, reset passwords, unlock users, edit user details, and assign permission sets. This app is restricted to users with the "Manage Users" permission.	Free for customers using: • Contact Manager Edition • Group Edition • Professional Edition • Enterprise Edition • Unlimited Edition • Performance Edition • Developer Edition	• Android phones and tablets • Apple iPad • Apple iPhone • Apple iPod Touch	No

Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
Salesforce Classic Mobile	You can view your dashboards, run simple reports, log calls and emails, keep track of your activities, and create, edit, and delete records. Most standard Sales objects and some Service objects are available. And if you're using the full version, custom objects and configurations are also supported.	A free, limited version is available for all Salesforce customers except for Database.com organizations Full version requires mobile licenses and is available for: • Professional Edition • Enterprise Edition • Unlimited Edition • Performance Edition • Developer Edition	• Android phones and tablets • Apple iPhone	Yes

SEE ALSO:

Security Basics

Security FAQ

- How can I be sure my data is secure in Salesforce?
- How can I be sure my data won't be lost?
- How can I be assured my data will be kept private?
- Can I automatically back up my data in Salesforce?
- Does Salesforce use my data for internal purposes?
- What happens when the system goes down?

How can I be sure my data is secure in Salesforce?

When you log in, the URLs used to access your data are all preceded with https:// instead of http://, which indicates that a secure connection has been established. Furthermore, whenever your password is changed or reset, or when you log in from a computer you have not used to access Salesforce before, you may have to activate your computer to successfully log in to Salesforce. Activating your computer allows Salesforce to verify your identity and prevent unauthorized access.

How can I be sure my data won't be lost?

We back up your data with a variety of methods to ensure that your organization does not experience any data loss. Every transaction is stored to RAID disks in real-time with archive mode enabled, allowing the database to recover all transactions prior to any system failure. Every night all data is backed up to a separate backup server and high speed automatic tape library. The backup tapes are cloned as an additional precautionary measure, and the cloned tapes are transported to an off-site, fireproof vault twice a month. In addition, the facility that stores our servers is architecturally designed to withstand catastrophic events and earthquakes up to 8.0 on the Richter scale.

How can I be assured my data will be kept private?

We are committed to keeping your data private and secure. For a greater understanding of the legal obligations Salesforce adheres to regarding data privacy, refer to the Privacy Statement, as well as the Terms of Use agreement. You can view both items by clicking the relevant link below the copyright at the bottom of any page.

Can I automatically back up my data in Salesforce?

Yes, weekly export service provides you with `.csv` files of all objects and attachments within Salesforce. You can set up this service to automatically perform a data export each week.

Does Salesforce use my data for internal purposes?

No. As outlined in the Privacy Statement, Salesforce does not review, share, distribute, print, or reference your data except as provided in the Salesforce Terms of Use, or as may be required by law. For exact information, refer to the Privacy Statement, as well as the Terms of Use agreement. You can view both items by clicking their links below the copyright at the bottom of any page.

What happens when the system goes down?

Salesforce builds redundancy into all systems to minimize system failures that could be perceived as customer outages. All components are proactively monitored and managed so faults are detected before system outages. While there may occasionally be system outages due to issues beyond our control, we employ numerous escalation procedures to notify the proper personnel in the event of a system outage, and remedy issues as quickly as possible.

What Is Read-Only Mode?

At Salesforce, we recognize that you may want to access your data at a moment's notice—even during our planned maintenance windows. To minimize interruption to your business, Salesforce gives users read-only access during splits, instance migrations, instance switches, and certain other maintenance events.

EDITIONS

Available in: **All Editions**

What to Expect in Read-Only Mode

When Salesforce is in read-only mode, you can navigate within the application and view and report on your business data.

During read-only mode, you **can't**:

- Add, edit, or delete data
- Perform any actions in Salesforce that modify your Salesforce data. For example:
  - Post on Chatter

- Use LiveAgent
- Refresh dashboards
- Perform API write or edit actions
- Perform bulk API read actions
- Save new or edited reports

> 📝 **Note:** You can still run existing reports.

Activity reminders don't occur, and Recent Items lists don't update. Login history is still recorded for compliance purposes, but it isn't reflected in your organization until a few minutes after the organization exits read-only mode.

When your organization is in read-only mode, desktop and mobile browser users see a banner at the top of their browser window:
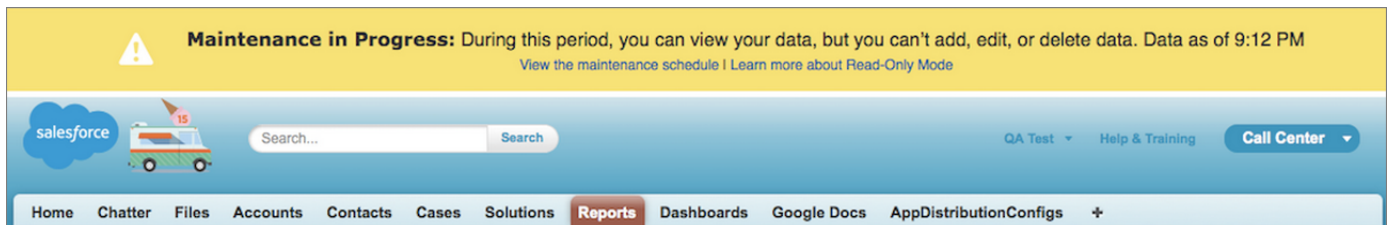
When to Expect Read-Only Mode

The maintenance schedule posted on trust.salesforce.com indicates whether each upcoming maintenance window includes read-only access. Planned maintenance windows vary in length depending on the level of maintenance needed. In addition, when users are notified two weeks before a planned maintenance window, the notification specifies whether the maintenance includes read-only access.

If you'd like to see how your organization works in read-only mode, contact Salesforce to have the testing option enabled in your sandbox organization.

Updates

Check for Desktop Client Updates

Desktop clients such as Salesforce for Outlook and Connect Offline integrate Salesforce with your PC. Your administrator controls which desktop clients you are allowed to install.

If you have access to see Home tab alerts, and you've logged in to a client in the past, you'll see an alert banner on your Home tab when a new version of a client is available.

You can also see which clients are installed on your computer and check for updates on your own. Just follow these steps.

1. From your personal settings, enter `Check for Updates` in the `Quick Find` box, then select **Check for Updates**.

2. From the table, review the names and version numbers of available desktop clients.

3. If you are using Internet Explorer, click the correct desktop client and then click **Install Now** to install a client. If you are using another browser such as Mozilla Firefox, click **Download Now** to save the installer file to your computer. Then double-click the saved file to run the installer program.

   After you install the update, you'll continue to see the alert banner on your Home tab until you log in through the newly updated client.

SEE ALSO:

   Viewing Messages and Alerts

   Find Your Personal Settings

Get Started with Salesforce

Getting Started as a New User

New to Salesforce? Set yourself up as a new user so you can start using the application right away.

Wondering where to start with Salesforce? Complete these steps first:

1. Log in for the first time.

2. Find your personal settings.

3. If your organization uses Chatter, set up your Chatter profile.

4. If your organization doesn't use Chatter, edit your personal information.

SEE ALSO:

   Getting Around in Salesforce

   Getting Started with Your Records

Log In for the First Time

When your administrator sets you up as a new user, you receive an email that includes your username and a link to your organization's Salesforce site.

Here's how to log in for the first time.

1. Check your email for your login information.

2. Click the link provided in the email.
   The link logs you in to the site automatically.

3. The site prompts you to set a password and choose a security question and answer to verify your identity in case you forget your password.

If you haven't received your login information, contact the Salesforce administrator at your organization.

Setting Up Your Chatter Profile

Your Chatter profile communicates who you are to your coworkers and any customers you communicate with. It features your photo and basic information like your professional title and contact details.

Set up your Chatter profile soon after you begin using Salesforce, and update it often.

> **Note:** If your organization doesn't use Chatter, you can still add and edit personal information.

1. Click the **Chatter** tab and find the placeholder profile image on the left side of the page. Click *Your Name* next to the placeholder image.

2. To update your profile photo, hover over the placeholder image and click **Add Photo**.

   > **Tip:** Use a photo of you and not a group of people or a pet. Chatter is a business tool, so choose a photo you don't mind showing to your boss and CEO.

3. To update your contact information, click ✏ under your profile photo. In the **Edit Profile** box, complete the fields on the Contact tab and the About tab.

   > **Tip:** Complete your profile with details about the department you work in, your past experience, or projects you are currently working on.

4. Click **Save All**.

SEE ALSO:

   Edit Your Personal Information

Find Your Personal Settings

Salesforce includes personal settings options to help you personalize your experience. Depending on which experience of Salesforce you have enabled, these settings are located in different parts of the application.

IN THIS SECTION:

   Find Your Personal Settings in Lightning Experience
   If you use Lightning Experience, your personal settings are located either in Personal Setup or My Settings.

If you use Salesforce Classic, your personal settings are located either in Personal Setup or My Settings.

Find Your Personal Settings in Lightning Experience

If you use Lightning Experience, your personal settings are located either in Personal Setup or My Settings.

1. At the top of any Salesforce page, click your image.

2. Click **Settings**.

3. On the left side of the page, click a menu item to display its sub-menu, then click the item you want.

> 💡 **Tip:** To quickly find a page, type the first few characters of its name in the **Quick Find** box. As you type, pages that match your search terms appear in the menu. For example, to find the Personal Information page, type `pers` in the **Quick Find** box.

EDITIONS
Available in: Lightning Experience
Available in: **All** editions except **Database.com**.

Find Your Personal Settings in Salesforce Classic

If you use Salesforce Classic, your personal settings are located either in Personal Setup or My Settings.

1. At the top of any Salesforce page, click the down arrow next to your name.

   Depending on your organization's user interface settings, you should see either **Setup** or **My Settings** in the menu.

2. From the menu under your name, click **Setup** or **My Settings**.

3. Do one of the following:

   - If you clicked **Setup**, look on the left side of the page and click a menu item to display its sub-menu, then click the item you want.

EDITIONS
Available in: Salesforce Classic
Available in: **All** editions except **Database.com**.
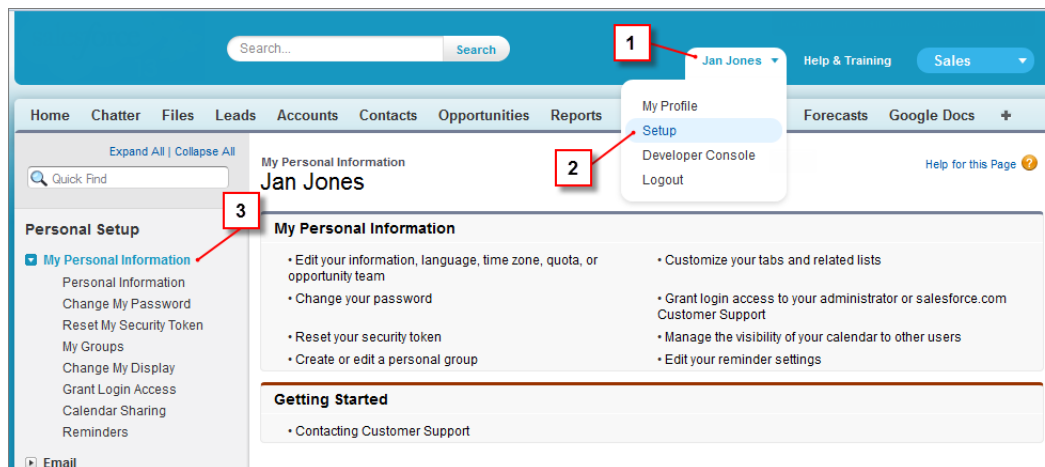
   - If you clicked **My Settings**, look on the left side of the page and click a menu item under My Settings to display its sub-menu, then click the item you want.
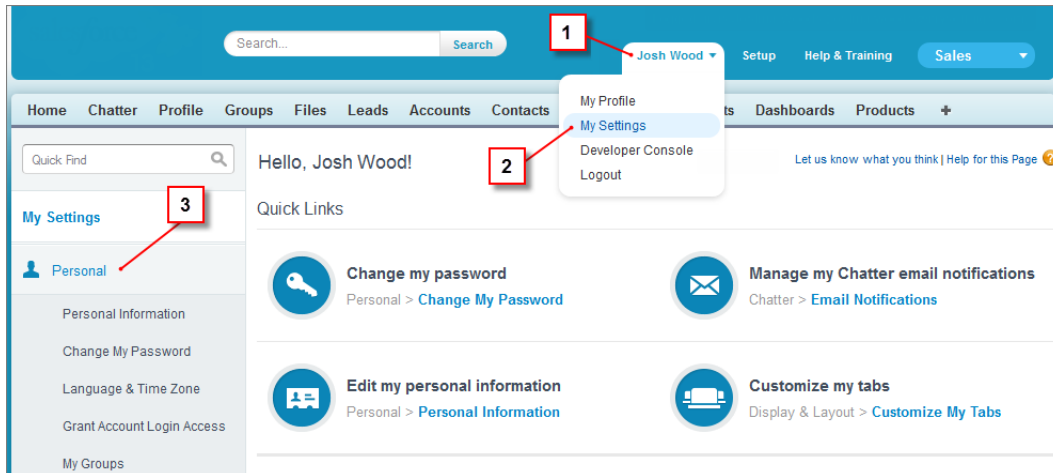
Tip: To quickly find a page, type the first few characters of its name in the **Quick Find** box. As you type, pages that match your search terms appear in the menu. For example, to find the Personal Information page, type `pers` in the **Quick Find** box.

SEE ALSO:

Find Setup

Edit Your Personal Information

1. From your personal settings, enter `Advanced User Details` in the `Quick Find` box, then select **Advanced User Details**. No results? Enter `Personal Information` in the `Quick Find` box, then select **Personal Information**.

2. To make changes, click **Edit**.

   If you change your email address, a confirmation message is sent to the new address. Click the link in the message for the new email address to take effect. This process ensures system security.

3. Save your changes.

SEE ALSO:

Change Your Password

Setting Up Your Chatter Profile

Find Your Personal Settings

EDITIONS
Available in: Salesforce Classic and Lightning Experience
The available personal setup options vary according to which Salesforce Edition you have.

Getting Around in Salesforce

Learn to navigate basic areas of Salesforce to find your way around the app quickly.

Salesforce is a valuable tool—learning the interface and where it stores your info will help you make the most of your experience.

1. Understand how Salesforce organizes your info.

2. Understand Salesforce pages.

EDITIONS
Available in: Salesforce Classic
Available in all editions

3. Understand your Home tab.

4. Navigate object home pages.

5. Find the setup menu.

SEE ALSO:

Getting Started as a New User

Getting Started with Your Records

Understanding How Salesforce Organizes Your Information

Salesforce groups your data into logical categories called objects. An object is a collection of fields named for the kind of information those fields capture. Commonly-used Salesforce objects include Contacts, Accounts, Cases, and Reports. For example, the Contacts object contains fields with information describing the people you do business with, such as their first names, last names, phone numbers, business titles, and the companies they work for.

There are two types of Salesforce objects.

- *Standard* objects are included with the Salesforce license your company purchases. These are the most commonly-used objects.
- *Custom* objects are created to meet your company's business needs.

Your organization's administrator can customize standard objects or create custom objects to support the type of work your company does or the industry you're in. For example, your organization may choose to create a custom object called "Bugs" to track their known product issues, or rename the standard object "Accounts" to "Clients" because this is how your organization refers to your customers.

In the Salesforce interface, you generally work with objects from their tabs. For example, the Opportunity object has an Opportunities tab. If you learn about an object from the Salesforce documentation but can't find it in the user interface, contact your administrator to find out whether the object is available to you. If your edition features objects and related tabs that you can't find documentation for, it may be because the object is custom. Contact your administrator to learn how to use it.

SEE ALSO:

Navigating Object Home Pages

Understanding Salesforce Pages

Salesforce apps are made up of tabs and pages. Standard objects such as Accounts, Contacts, and Leads, and other features such as Chatter typically have tabs, and from a tab, you navigate through pages to interact with the features you're using. For example, if you want to create an account record, you'll click the Accounts Tab, and land on the Accounts Home page. Click **New** to open the Account Edit page where you'll enter information for the account. Click **Save**, and you'll see the Account's Detail page. Return to the Accounts Home page and the new account is listed.

Salesforce tabs can have multiple types of pages, including Home, Edit, and Detail pages, and you can create list views for some objects. Chatter has one primary page type: a feed. And Data.com has a search interface. Dashboards and reports have their own page styles, as well.

Your system administrator typically sets up page layouts for standard objects and enables the navigation features your organization can use, but interacting with Salesforce is easier if you understand the most common page elements for the most frequently used objects. They include:

1. A *tag* bar, where you can view and add tags for a record.

2. A *feed*, where you can add and view comments about a record.

3. A *sidebar*, where you can do things like search and quickly create new records.

4. *Sections* for the record, with key fields and links.

5. *Related lists*, which group and display links to other records associated with the one you're viewing. You can change the order of related lists on your page.

6. Various *links* that help you move around the page or go to different pages or external sites.

Let's look at these elements on an account detail page.

SEE ALSO:

Tags Overview

Understanding the Salesforce Sidebar

Navigating Object Home Pages

Home Tab Overview

Navigating Object Home Pages

In the desktop application, commonly-used objects are found by clicking on their tabs, which appear at the top of your screen. Other Salesforce features, such as Home and Chatter, also have tabs.
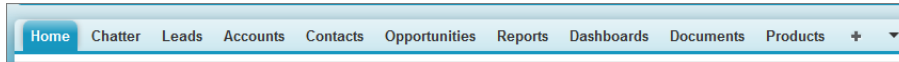
To work with your data, click an object's tab. For instance, to access account information for the customers you work with, click the Accounts tab. Here you find:

1. The name of the object and type of data you are viewing. In this case, Accounts.

2. *List View* options. A list view narrows your accounts to a specific set (for example, you can choose to view All Accounts or just Recently Viewed Accounts).

3. A list of recently-accessed records. Here, Recent Accounts. This list is visible for every standard and custom object and can't be customized.

4. Links to other features you may want to use next.

Home Tab Overview

From the Home tab, you can:

- Create a Chatter post (if your organization uses Chatter)
- View dashboard snapshots
- View your tasks and calendar
- Search the feed (🔍)

You can also use the sidebar components, such as Create New, Recent Items, and Custom Links, that you'll also see on other Salesforce pages. Your Home tab layout, sidebar components, and links are enabled and configured by your administrator.

Alert banners may appear on the Home tab to let you know when updates are available for desktop clients such as Connect Offline.

SEE ALSO:

  Navigating Object Home Pages

Open a Different App

Not finding the feature you need to use? Maybe it's in another app. Check out the drop-down menu to see all the apps available to you, and select the one you need.

To use features available in a different Salesforce app than the one you have open, you need to open the other app. Other apps include the Salesforce Marketing app, the Call Center app, and any custom apps for your organization.

Your organization may also use connected apps. Connected apps include productivity apps such as Gmail™ and Microsoft Office 365™, or other apps to help you get your work done. If your administrator has added these apps to your organization, they appear in the App Launcher.

IN THIS SECTION:

  Open a Different Salesforce App in Salesforce Classic
  It's easy to navigate between Salesforce apps, such as the Sales app and the Marketing app.

  Open an App from the App Launcher in Salesforce Classic
  Navigate between your Salesforce apps and connected apps from a single menu.

  Open a Different App in Lightning Experience
  Use Search or the App Launcher to navigate between all of your apps.

Find Setup

How you find Setup depends on which Salesforce experience you're using and on your organization's user interface settings.

Salesforce includes many options for setting up, maintaining, and customizing your organization. Some organizations also have options for building, packaging, and distributing their own apps. These options are all available from the Setup menu. If you're a Salesforce administrator or developer, you use the Setup menu frequently. Your organization's user interface settings determine how everyone in your organization accesses this menu.

1. Look at the top of any Salesforce page.

   - If you're using Lightning Experience, click ⚙, then select **Setup Home**.
   - If you're using Salesforce Classic and you see **Setup** in the user interface header, click it.
   - If you're using Salesforce Classic and you don't see **Setup** in the header, click your name, then select **Setup**.

2. Enter the name of the page that you want in the `Quick Find` box, then select the appropriate page from the menu.

   > 💡 Tip: Type the first few characters of a page's name in the `Quick Find` box. As you type, pages that match your search terms appear in the menu. For example, to find the Language Settings page, type *lang* in the `Quick Find` box, then select **Language Settings**.

SEE ALSO:

Find Your Personal Settings in Salesforce Classic

Getting Started with Your Records

New users might need to view, edit, or delete existing records that have been imported into Salesforce, or learn to create new ones.

These tasks explain how to begin working with your data.

- Find and view your records and data
- Edit your records
- Create new records
- Open items you've recently viewed
- Deleting your records
- New user tips

Now that you've learned how to work with your records, you might want to explore more advanced Salesforce features. We recommend reviewing the **Downloadable User Guides**, **Tip Sheets and User Guides**, and **Online Training** videos found on the Salesforce Success Communities Help & Training site.

Finding and Viewing Records and Data

Use tabs, search, or lists to look at your data.

Much of your Salesforce data is stored in individual *records*, and organized within objects. For example, the Account object presents all of your account records. If the Acme company is one of your accounts, you'll have an account record for Acme.

When you're working with records, it's important to remember that the types of records you can create, view, edit, and delete are determined by administrator settings, such as a user profile or permission set. Your access to individual records may be determined by other configurations, such as sharing settings. And your access to fields on types of records may be controlled by field-level security. Work with your administrator to make sure you have access to the records and data you need.

There are a few easy ways to find and view your records.

- From a tab, such as Accounts or Contacts, start from the default view and click **Go!** or select a different view.

The resulting page you see is called a *list view*.

- Search for a record using keywords, such as a name or address stored in the record. Use the search bar in the banner displayed on most pages.
- On many records, below the main page sections, look for related lists, which identify records that are associated with the record you're currently viewing. For example, an account record probably has a related list of contacts at that account.

SEE ALSO:

Understanding Salesforce Pages

Get to Know Your Salesforce Admin

Create Records

Creating records is standard procedure for most Salesforce users. Some objects (such as Account) have special *guidelines and considerations* you need to be aware of, but the *process* of creating a record is similar for all.

IN THIS SECTION:

Create a Record in SalesforceLightning Experience

Create new Salesforce records for opportunities, leads, tasks, notes, accounts, and contacts. Some objects (such as Account) have special *guidelines and considerations* for you to be aware of, but the *process* of creating a record is similar for all.

Create a Record in Salesforce Classic

Create new Salesforce records for opportunities, leads, tasks, notes, accounts, and contacts. Some objects (such as Account) have special *guidelines and considerations* for you to be aware of, but the *process* of creating a record is similar for all.

SEE ALSO:

Editing Records

Deleting Records

Guidelines for Entering Currency, Dates, Times, and Phone Numbers

Create Notes and Add Them to Records

Attach Files to Records

EDITIONS
Available in: Lightning Experience
Available in: Salesforce Classic
Available in all editions

Editing Records

1. Make sure you're aware of any guidelines for the kind of record you're editing. The Salesforce help will tell you.

2. Find and open the record you want to edit.

3. Click **Edit**.

4. Enter or edit values in the fields.

   💡 Tip: Most objects have field definitions in the Salesforce help. Just search the help for the object name + "fields". For example, if you're creating or editing an account record and want to know more about your options in the `Industry` drop-down list, look up "Account Fields" in the help.

EDITIONS
Available in: Salesforce Classic
Available in all editions

USER PERMISSIONS
To edit records:
• "Edit" on the object for the kind of record you're editing

5. When you finish entering or editing values, click **Save**.

SEE ALSO:

> Create Records
>
> Guidelines for Entering Currency, Dates, Times, and Phone Numbers
>
> Guidelines for Editing Records with the Inline Editor
>
> Editing Records Directly From Enhanced Lists
>
> Create Notes and Add Them to Records
>
> Attach Files to Records
>
> Checking Your Spelling

Deleting Records

Deleting records is standard procedure for most Salesforce users. For some kinds of objects, deleting one record affects other, related records. For example, if you delete an account or contact, all associated assets are also deleted.

1. Make sure you're aware of the effects (if any) of deleting the kind of record you want to delete. The Salesforce help will tell you.

2. Find and open the record you want to delete.

3. Click **Delete**.

SEE ALSO:

> Using the Recycle Bin
>
> Delete Notes and Attachments from Records

EDITIONS
Available in: Salesforce Classic
Available in all editions

USER PERMISSIONS
To delete records:
• "Delete" on the object for the kind of record you're deleting

Opening Items You've Recently Viewed

In the Recent Items section of the Salesforce sidebar, you'll find a list of up to 10 items (records, documents, custom objects, and the like) you've most recently added, edited, or viewed.

To open any item's detail or edit page, just click its link.

> 💡 **Tip:** If your organization has enabled hover details, you can hover your mouse over any item in the Recent Items list to view key information about the record before clicking into that record's detail or edit page.

> 📝 **Note:** Your Recent Items may show fewer than 10 items if you have recently deleted any of your recently viewed items. Likewise, the Recent lists on the tab home pages (for example, the Recent Leads list) may show fewer than 10 or 25 items if you have recently deleted items.

EDITIONS
Available in: both Salesforce Classic and Lightning Experience
Available in: **All** Editions

Tips for New Users

Learn the tips you need to be a fast, productive Salesforce user on day one.

New users should keep these tips in mind:

- When you click on an object to find your data, you won't see a full list of your existing records—Salesforce keeps those tucked out of view until you manually recall them, in case you want to choose a subset of the full list. Choose an option within *View*, and click **Go!**
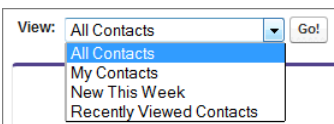
- *Related lists* are links featured at the bottom of object pages. Related lists provide quick access to other related objects that you might want to visit next. This feature adds a lot of value, because it gives you fast access to information you likely need next. It means less navigation and can speed up your workflow. In the Accounts object, your related lists might look like this:
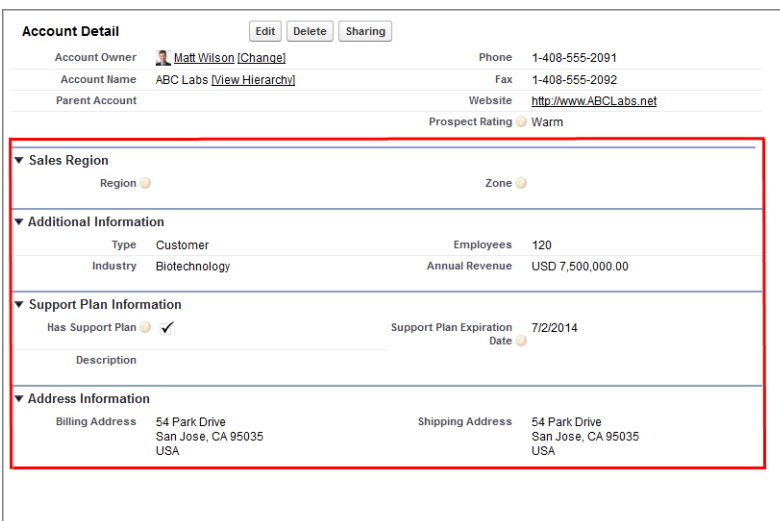
Salesforce delivers the application with some standard related lists, but administrators can also customize some related list items.

- If you read or hear about a feature that you don't see in your own interface, don't worry. Your administrator can customize it to meet your organization's needs. If your administrator hasn't enabled help for the customization, contact them.

- Our help and training materials might mention a feature that your company hasn't enabled, or that your permissions profile doesn't allow you to see. If you believe this feature should be in your interface, or might help you in your job, contact the Salesforce administrator at your company. Not sure who that is? Reach out to the person at your company who introduced you to Salesforce.

- Save your work! It's easy to spend a lot of time updating the fields in a record and then to navigate away from that screen without saving. Make a habit of seeking out the save button before clicking away through another page element.

SEE ALSO:

Why Can't I See Some Features?

Get to Know Your Salesforce Admin

Why Can't I See Some Features?

Because Salesforce is highly customizable, you might not have access to all of the product features.

You might learn about new Salesforce features in our help documentation and training videos. However, sometimes you'll find you can't access these through your interface. This might happen for several reasons.

- You may need to adjust your custom page views or install external apps to enable the feature.

- Your permissions and access settings for some features are limited.

- Your company customized Salesforce so that some standard objects and fields have different names, or created their own custom objects and fields.

- The feature you're looking for isn't offered in the Salesforce edition or the Salesforce experience that your company uses.

SEE ALSO:

Get to Know Your Salesforce Admin

Get to Know Your Salesforce Admin

Your Salesforce administrator—or "admin" as you may choose to call them— is a Salesforce user with system administration duties and other super powers. Admins are responsible for setting up Salesforce for their organizations and making sure it runs smoothly. Admins have a special profile, which lets them add users and specify what they can see and do in Salesforce. Admins can make everyone more productive by creating custom Salesforce objects, workflows, validation rules, reports, and more. Admins are planners, problem-solvers, and heroes.

All Salesforce organizations have at least one administrator, but larger ones may have more. Your administrator's role can be as simple or as complex as your company's size and structure. In smaller organizations, the admin might be someone who also uses Salesforce the way other users do: to sell products or provide customer service, for example. Many hats, one big brain.

Salesforce offers lots of features and items (such as those detailed in the *Learn Salesforce Basics* guide) that you can set up and configure yourself. It's quite satisfying! For some things, though, you should partner with your trusty admin. They'll help you get the best of what Salesforce has to offer and make sure you have a successful and productive experience.

Here are a few examples of the kinds of things your admin can help you with or do for you.

- Find or use an object, field, or feature you heard about during training.

- Create a custom workflow to find out when a case is closed.

- Create a custom approval process to sign off on employee expenses.

- Create a custom report for your sales region.

- Give you a user permission that's not granted as part of your user profile.

- Answer questions about your own or others' access to records.

- Address those cursed error messages that ask you to contact your administrator for help or more information.

How you contact your administrator, and when and why, depends on your company's internal business policies and practices. Need to find out exactly what those are? Ask your administrator!

SEE ALSO:

Why Can't I See Some Features?

Grant Login Access

Define Personal Information and Preferences

Activate Your Computer

Verify your identity and help prevent unauthorized access by activating your computer with Salesforce.

▶ Watch a Demo (1:29 minutes)

Sometimes you're prompted to enter a code when you log in to Salesforce to verify your identity. When you verify your identity, you also "activate" your computer. Computer activation allows Salesforce to associate your identity with your computer's network IP address. The activation helps prevent unauthorized access to the service whenever your password is changed or reset, or when you use your computer to log in from an unauthenticated network IP address.

> **EDITIONS**
>
> Available in: Both Salesforce Classic and Lightning Experience
>
> Password policies available in: **All** Editions

1. When instructed to verify your identity, follow the on-screen prompts to retrieve a verification code. Salesforce automatically selects the highest-priority verification method available to you, in the following order of priority.

   One-Time Password Generator App
   If you connected an authenticator app (such as Salesforce Authenticator or Google Authenticator) to your account, use the app on your mobile device to generate the verification code. This type of code is sometimes called a "time-based one-time password." The code value changes periodically. Use the current value.

   > 📝 Note: Some accounts require two-factor authentication to log in. Your admin enables two-factor authentication for your account. If your account has this requirement, you have to use a mobile authenticator app to generate your verification code.

   SMS Text Message
   You receive a verification code in the body of a text message sent to your verified mobile phone. If you don't have a verified mobile number associated with your account, you're prompted to register it when you log in to Salesforce. Registering your phone number verifies your mobile number and enables this method when you're challenged in the future. If your mobile number isn't current, you don't receive the text message. In this case, contact your Salesforce admin.

   Email
   Salesforce sends the code in an email to the email address specified on your user detail page. The code expires after 24 hours.

2. Enter the verification code in your open identity verification page.

3. Click **Verify**.

SEE ALSO:

Connect a One-Time Password Generator App or Device

You can connect a one-time password generator app, such as Salesforce Authenticator or Google Authenticator, to your account. If your administrator requires a verification code when you log in for increased security (called "two-factor authentication"), use the code generated by the app. You can also use a code generated by the app whenever we have to verify your identity.

This additional level of security is a second "factor" of authentication. If your administrator has set this requirement, you have to configure this additional factor (usually an authenticator app that

> **EDITIONS**
>
> Available in: Both Salesforce Classic and Lightning Experience
>
> Available in all editions

displays a code, such as Salesforce Authenticator or Google Authenticator) for your account. This additional factor of authentication generates your verification code, also called a "time-based one-time password" (usually a numeric code). Once you connect the one-time password generator to your account, you're prompted to enter the code from the authenticator app whenever you log in to Salesforce.

1. Download the supported authenticator app for the type of device you use. You can use any authenticator app that supports the time-based one-time password (TOTP) algorithm (IETF RFC 6238), such as Salesforce Authenticator for iOS, Salesforce Authenticator for Android, and Google Authenticator.

2. From your personal settings, enter `Advanced User Details` in the `Quick Find` box, then select **Advanced User Details**. No results? Enter `Personal Information` in the `Quick Find` box, then select **Personal Information**.

3. Find **App Registration: One-Time Password Generator** and click **Connect**.

4. For security purposes, you're prompted to log in to your account.

5. Scan the QR code with the authenticator app on your mobile device.

   Alternatively, you can manually enter your username and the key displayed when you click **I Can't Scan the QR Code** into the app.

6. Enter the code generated by the authenticator app into the **Verification Code** field in Salesforce.

   The authenticator app generates a new verification code, periodically. Enter the current code.

7. Click **Connect**.

SEE ALSO:

   Activate Your Computer

   Find Your Personal Settings

Edit Your Personal Information

1. From your personal settings, enter `Advanced User Details` in the `Quick Find` box, then select **Advanced User Details**. No results? Enter `Personal Information` in the `Quick Find` box, then select **Personal Information**.

2. To make changes, click **Edit**.

   If you change your email address, a confirmation message is sent to the new address. Click the link in the message for the new email address to take effect. This process ensures system security.

3. Save your changes.

SEE ALSO:

   Change Your Password

   Setting Up Your Chatter Profile

   Find Your Personal Settings

EDITIONS

Available in: Salesforce Classic and Lightning Experience

The available personal setup options vary according to which Salesforce Edition you have.

Change Your Password

Change or reset your password for better security, even if you've forgotten your current password.

To protect the privacy of your data, change your password periodically. If your administrator expires user passwords on a periodic basis, you're prompted to change your password at the end of each period.

> Note: If you have the "User Single Sign-On" permission, only an administrator can reset your password. For help, contact your Salesforce administrator.

After you log in, you can change your current password.

1. From your personal settings, enter `Password` in the `Quick Find` box, then select **Change My Password**.

2. Enter the password information requested.

3. Click **Save**.

If you lose your password, click the forgot password link on the login page to reset your password via email.

SEE ALSO:

Reset Your Forgotten Password

Reset Your Security Token

Activate Your Computer

Find Your Personal Settings

Change Your Security Question

If you forget your password and need to reset it, you're sometimes required to verify your identity by answering a security question that you previously chose. You can change the security question and answer on the Change My Password page in your personal settings.

> Note: If you don't see the Change My Password option, contact your Salesforce admin for assistance.

1. From your personal settings, enter `Password` in the `Quick Find` box, then select **Change My Password**.

2. Enter your current password.

3. From the Security Question drop-down menu, select a question.

4. Enter your answer to the question in the `Answer` field.

5. Click **Save**.

SEE ALSO:

Find Your Personal Settings

Edit Your Language and Locale Settings

1. From your personal settings, enter `Time Zone` in the `Quick Find` box, then select **Language and Time Zone**. No results? Enter `Personal Information` in the `Quick Find` box, then select **Personal Information**.

2. Specify these settings as needed.

   - For `Time Zone`, select your primary time zone.

   - For `Locale`, select your country or geographic region.

   - For `Language`, select your primary language. All text and online help appears in the language you select.

   - For `Email Encoding`, select the character set and encoding option for email that you send from Salesforce.

3. Click **Save**.

SEE ALSO:

[Find Your Personal Settings](#)

Edit Email Settings

To alter email settings that apply to all outbound emails you send from within the application:

1. From your personal settings, enter `My Email Settings` in the `Quick Find` box, then select **My Email Settings**.

2. Make your changes.

   📝 Note: In Personal and Developer Editions, a Salesforce-specific tag line is added below your personal signature on all outbound emails.

SEE ALSO:

[Find Your Personal Settings](#)

Set Record Type Preferences

Set an option to automatically insert your default record type when creating new records. Using this setting, you can bypass the page prompting you to select a record type. If you have several different record types available to you, you may prefer to be prompted to select a record type every time you create a new record.

1. From your personal settings, enter `Record Type` in the `Quick Find` box, then select **Set Default Record Types** or **Record Type Selection**—whichever one appears.

2. Check any box to automatically select the default record type when creating records of that type.

   Any unchecked boxes indicate that you prefer to be prompted to select a record type.

3. Click **Save**.

> 📝 **Note:** The Record Type Selection option may not be available because your organization is not using record types or multiple record types are not available for a particular tab.
>
> Individual checkboxes are only offered when you have more than one record type available for a tab.
>
> If your organization uses person accounts, note that checking the `Account` box on this page causes one default record type selection for all types of accounts. It is not possible to set separate default record type selections for business accounts and person accounts. If you work with both types of accounts, leave the box blank.

SEE ALSO:

[Find Your Personal Settings](#)

Get Set up for the Way You Work

Browsers

Supported Browsers

Supported browsers for Salesforce vary depending on whether you use Salesforce Classic or Lightning Experience.

- [Supported Browsers for Salesforce Classic](#)
- [Supported Browsers for Lightning Experience](#)

Supported Browsers for Salesforce Classic

Salesforce Classic is supported with Microsoft® Internet Explorer® versions 9, 10, and 11 and Apple® Safari® versions 5.x, 6.x and 7.x on Mac OS X. The most recent stable versions of Mozilla® Firefox® and Google Chrome™ are also supported. The following limitations apply.

> **EDITIONS**
>
> Salesforce Classic available in: **All** Editions

> 📝 **Note:** Salesforce Classic support for Microsoft® Internet Explorer® versions 7 and 8 is discontinued as of Summer '15.

Using Salesforce Classic in a mobile browser isn't supported. Instead, we recommend using the Salesforce1 app when you're working on a mobile device. To see the mobile browsers that are supported for Salesforce1, check out [Requirements for the Salesforce1 Mobile App](#) on page 185.

Microsoft Internet Explorer versions 9, 10, and 11

If you use Internet Explorer, we recommend using the latest version that Salesforce supports. Apply all Microsoft software updates. Note these restrictions.

- The full Salesforce site is not supported in Internet Explorer on touch-enabled devices for Windows. Use the Salesforce1 mobile browser app instead.
- The HTML solution editor in Internet Explorer 11 is not supported in Salesforce Knowledge.
- The Compatibility View feature in Internet Explorer isn't supported.
- Changing the compatibility parsing mode of the browser, for example, by using the `X-UA-Compatibility` header, isn't supported.
- The Metro version of Internet Explorer 10 isn't supported.
- Internet Explorer 11 isn't supported for the Developer Console.

- Internet Explorer 11 isn't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher.
- Community Templates for Self-Service supports Internet Explorer 9 and above for desktop users and Internet Explorer 11 and above for mobile users.
- Internet Explorer 9 isn't supported for Salesforce Wave Analytics.
- Internet Explorer 9 and 10 aren't supported for the Lightning App Builder.

For configuration recommendations, see Configuring Internet Explorer on page 37.

Mozilla Firefox, most recent stable version

Salesforce makes every effort to test and support the most recent version of Firefox.

- Mozilla Firefox is supported for desktop users only for Community Templates for Self-Service.

For configuration recommendations, see Configuring Firefox on page 38.

Google Chrome, most recent stable version

Chrome applies updates automatically. Salesforce makes every effort to test and support the most recent version. There are no configuration recommendations for Chrome.

Chrome isn't supported for:

- The **Add Google Doc to Salesforce** browser button
- The Console tab (The Salesforce console is supported.)

Apple Safari versions 5.x, 6.x and 7.x on Mac OS X

There are no configuration recommendations for Safari. Apple Safari on iOS isn't supported for the full Salesforce site.

Safari isn't supported for:

- The Salesforce console
- Salesforce CRM Call Center built with CTI Toolkit versions below 4.0
- Salesforce Wave Analytics

Wave Analytics Supported Browsers

Browser support is available for Microsoft Internet Explorer version 11 and the most recent stable versions of Mozilla Firefox and Google Chrome.

Recommendations and Requirements for All Browsers

- For all browsers, enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn't available, enable TLS 1.1. Browsers that don't support TLS 1.1 or TLS 1.2 won't be able to access Salesforce after we deactivate TLS 1.0. Deactivation is scheduled, but not guaranteed, for the first and second quarters of 2016.
- The minimum screen resolution required to support all Salesforce features is 1024 x 768. Lower screen resolutions don't always properly display Salesforce features such as Report Builder and Page Layout Editor.
- For Mac OS users on Apple Safari or Chrome, make sure the system setting `Show scroll bars` is set to **Always**.
- Some third-party Web browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable the Web browser's plug-ins and extensions and try again.

Some features in Salesforce—and some desktop clients, toolkits, and adapters—have their own browser requirements. For example:

- Internet Explorer is the only supported browser for:
  - Standard mail merge
  - Installing Salesforce Classic Mobile on a Windows Mobile device

- – Connect Offline

- For the best experience with the enhanced page layout editor, use Firefox.

- For the best experience on machines with 8 GB of RAM in the Salesforce console, use Chrome.

- Browser requirements also apply for uploading multiple files on Chatter.

Supported Browsers for Lightning Experience

Lightning Experience is supported with Microsoft® Internet Explorer® version 11, Apple® Safari® version 8.x on Mac OS X. The most recent stable versions of Mozilla® Firefox® and Google Chrome™ are also supported. If you're using Microsoft® Internet Explorer® versions 7–10, you're redirected to Salesforce Classic. The following limitations apply.

You can't access Lightning Experience in a mobile browser. Instead, we recommend using the Salesforce1 app when you're working on a mobile device. For a list of supported mobile browsers on Salesforce1, see Requirements for the Salesforce1 Mobile App on page 185.

Microsoft Internet Explorer version 11

Note these restrictions.

- The full Salesforce site is not supported in Internet Explorer on touch-enabled devices for Windows. Use the Salesforce1 mobile browser app instead.

- The HTML solution editor in Internet Explorer 11 is not supported in Salesforce Knowledge.

- The Compatibility View feature in Internet Explorer isn't supported.

- Changing the compatibility parsing mode of the browser, for example, by using the `X-UA-Compatibility` header, isn't supported.

- Internet Explorer 11 isn't supported for the Developer Console.

For configuration recommendations, see Configuring Internet Explorer on page 37.

Mozilla® Firefox®, most recent stable version

Salesforce makes every effort to test and support the most recent version of Firefox. For configuration recommendations, see Configuring Firefox on page 38.

Google Chrome™, most recent stable version

Chrome applies updates automatically. Salesforce makes every effort to test and support the most recent version. There are no configuration recommendations for Chrome.

Chrome isn't supported for the Add Google Doc to Salesforce browser button.

> Note: The latest stable version of Google Chromium™ is supported.

Apple® Safari® version 8.x on Mac OS X

There are no configuration recommendations for Safari.

Safari isn't supported for:

- Salesforce CRM Call Center built with CTI Toolkit versions earlier than 4.0

- Salesforce Wave Analytics

Wave Analytics Supported Browsers

Browser support is available for Microsoft Internet Explorer version 11 and the most recent stable versions of Mozilla Firefox and Google Chrome.

Recommendations and Requirements for All Browsers

- For all browsers, enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn't available, enable TLS 1.1. Browsers that don't support TLS 1.1 or TLS 1.2 won't be able to access Salesforce after we deactivate TLS 1.0. Deactivation is scheduled, but not guaranteed, for the first and second quarters of 2016.

- The minimum screen resolution required to support all Salesforce features is 1024 x 768. Lower screen resolutions don't always properly display Salesforce features such as Report Builder and Page Layout Editor.

- For Mac OS users on Apple Safari or Google Chrome, make sure that the system setting `Show scroll bars` is set to **Always**.

- Some third-party Web browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable the Web browser's plug-ins and extensions and try again.

Getting Plug-ins for Viewing Documentation and Online Training Courses

Download the plug-ins you need to view Salesforce PDF documentation and online training courses.

- **Adobe Reader**—For viewing PDF documentation. Go to the Adobe Reader download page to download a free copy.
- **Macromedia Flash Player**—For taking online training courses. Go to the Adobe Flash Player download page to download a free copy.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions except **Database.com**

Learning Keyboard Shortcuts

Use keyboard shortcuts to work efficiently in Salesforce.

In addition to the standard keyboard shortcuts available with your Web browser, Salesforce supports these keyboard shortcuts.

- Press ALT plus any number between 0 and 9 to highlight an item in the Recent Items list in the sidebar. For example, press ALT+1 to highlight the first item in the list, ALT+2 to highlight the second item, and so on. Pressing ALT+0 highlights the tenth item in the list.

  Note: If you're using Mozilla® Firefox®, press SHIFT+ALT plus a number to automatically display the item you highlighted. If you're using Mozilla Firefox on a Mac, press CTRL plus a number. If you're using Microsoft® Internet Explorer®, press ALT plus a number and then press Enter to display the highlighted item.

- If your organization has enabled the collapsible sidebar, press ALT+S to open or close the sidebar. Opening the sidebar using ALT+S automatically places your cursor in the Search box.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions except **Database.com**

Configuring Internet Explorer

If you use Internet Explorer, we recommend using the latest version that Salesforce supports. Apply all Microsoft software updates.

To maximize the performance of Internet Explorer, set the following in the Internet Options dialog box via your browser's settings:

General Tab

  1. From the General tab, click **Settings** under Browsing History.

EDITIONS

Available in: Salesforce Classic

Available in all editions

2. For the `Check for newer versions of stored pages` option, select **Automatically**.

3. For the `Disk space to use` option, enter at least 50 MB.

Security Tab

1. From the Security tab, click **Custom Level** under Internet and scroll to the Scripting section.

2. Make sure the `Active Scripting` option is enabled. JavaScript depends on this setting being enabled.

Privacy Tab

1. From the Privacy tab, click **Advanced**.

2. Select the **Override automatic cookie handling** option.

3. Select the **Always allow session cookies** option.

4. For the **Third-party Cookies** option, select **Accept**.

Advanced Tab

From the Advanced tab, scroll to the Security section and do the following:

- Do not select the `Do not save encrypted pages to disk` option.

- Select `Use TLS 1.0`, `Use TLS 1.1`, and `Use TLS 1.2`. Make sure to *deselect* `Use SSL 2.0` and `Use SSL 3.0`. SSL is no longer supported by Salesforce. TLS 1.0 won't be supported after we deactivate it, currently scheduled for the first and second quarter of 2016.

  💡 Tip: The `Empty Temporary Internet Files folder when browser is closed` option causes the cache to clear when Internet Explorer is shut down. This increases privacy, but sometimes decrease performance.

SEE ALSO:

Supported Browsers

Configuring Firefox

To ensure Salesforce works optimally with Firefox, you'll need to do a few configurations to the browser.

Salesforce makes every effort to test and support the most recent version of Firefox.

EDITIONS

Available in: Salesforce Classic

Available in all editions

Required Settings

Make sure Firefox can accept cookies.

1. Click **Tools** > **Options**.

2. Go to the Privacy panel.

3. For the `Firefox will` option, select **Use custom settings for history**

4. Select the **Accept cookies from sites** option.

5. Select the **Accept third-party cookies** option.

6. For the `Keep until` option, select **they expire**.

7. Click **OK**.

Advanced Settings

Optionally, configure advanced caching preferences to maximize performance.

1. Type `about:config` in the browser's location bar, and then press Enter.

2. If a warning displays, click **I'll be careful, I promise!**

3. Search for the following preferences and set them to the recommended value by double-clicking the preference name. Changes take effect immediately.

4. Change how the browser retains common resources across requests by setting the following caching preferences.

Preference	Recommended Value	Default Value
browser.cache.check_doc_frequency	3	3
browser.cache.disk.capacity	50,000 or more; increase to use more hard disk space	50,000
browser.cache.disk.enable	True	True
browser.cache.disk_cache_ssl	True	False
browser.cache.memory.enable	True	True
network.http.use-cache	True	True

> **Note:** You can set some of these preferences by clicking **Tools** > **Options** in the Firefox browser. Refer to Firefox Help for details.

> **Tip:** Setting privacy.sanitize.sanitizeOnShutdown to "True" causes the cache to clear when Firefox shuts down. This increases privacy, but may decrease performance.
>
> To view the contents of your cache, type `about:cache` in the Firefox location bar and press Enter.
>
> Refer to MozillaZine Knowledge Base and Firefox Support Home Page for more information on these and other preferences.

SEE ALSO:

Supported Browsers

Understanding Your Access to UI Elements, Records, and Fields

Your administrator can customize many different areas to secure your company's data. Additionally, users in Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations can control the access that other users have to their data by sharing records individually with colleagues.

To determine whether you can access data, review this table:

Action	Access Needed
To view a tab:	• You must have the "Read" permission on the records within that tab. • Make sure you have customized your personal display to show the tab.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions except **Database.com**

Action	Access Needed
To view a record:	- Make sure you have the "Read" permission on the type of record you want to view. - Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations can set a sharing model that determines the access users have to records they do not own. Depending on your sharing model, the owner may need to share the record with you if you are not the owner of the record or above the owner in the role hierarchy. - Enterprise, Unlimited, Performance, and Developer Edition organizations can use territory management to grant access to accounts, opportunities, and cases.
To view a field:	- Make sure you have the "Read" permission on the type of record for the field. - For Enterprise, Unlimited, and Performance Edition organizations, check the field-level security; your field-level security settings may prevent you from seeing the field. - Check your page layout; depending on your page layout settings, you may see some fields and not others.
To edit a field:	- Make sure you have the "Edit" permission on the type of record for the field. - For Enterprise, Unlimited, and Performance Edition organizations, check the field-level security; your field-level security settings may set a field to "Read-Only." - Check your page layout; page layouts can set fields to read only.
To view a related list:	- Make sure you have the "Read" permission on the type of records displayed in the related list. - Check your page layout; depending on your page layout settings, you may see some fields and not others.
To view a button or link:	Make sure you have the necessary permission to perform the action. Buttons and links only display for users who have the appropriate user permissions to use them.

SEE ALSO:

Granting Access to Records

Viewing Which Users Have Access to Your Records

Record Access Levels

Customizing Your Display

You can customize your Salesforce display through your personal settings.

- Customize which tabs display in your app and in what order
- Customize what displays on your pages

Customize Your Tabs

Specify which tabs display when you log in, or if you have multiple apps, which tabs display in each app.

1. From your personal settings, enter *Customize My* in the Quick Find box, then select **Customize My Tabs**. No results? Enter *Display* in the Quick Find box, then select **Change My Display**.

2. If you have access to multiple apps, select the app whose tabs you want to customize from the Custom Apps drop-down list.
   By default, you'll see the tabs for the selected custom app that are set for your profile.

   Note: The first tab that displays when you select an app may change if your administrator changes the app's default landing tab.

3. If desired, add each tab you want to display and change the display order of the tabs you've selected.

4. Save your changes.

SEE ALSO:
> Customize Your Pages
> Find Your Personal Settings

Customize Your Pages

Specify the related lists that appear in detail pages.

1. From your personal settings, enter *Customize My* in the Quick Find box, then select **Customize My Pages**. No results? Enter *Display* in the Quick Find box, then select **Change My Display**.

   For your Home tab, select the dashboard snapshot to display on the Home tab. The link to customize your Home tab is available only if your administrator has customized your home page layout to include a dashboard.

   For all other tabs, specify which related lists display on your detail pages.

   - To add or remove related lists, select a related list and click the **Add** or **Remove** arrow.

     Note: This setting may change if your administrator changes the page layout for a particular tab.

   - To change the order of the related lists, select a related list title in the Selected List box, and click the **Up** or **Down** arrow.

2. Save your changes.

SEE ALSO:

> Customize Your Tabs
>
> Find Your Personal Settings

Adding Tabs for Frequently Used Items

The Salesforce user interface is composed of tabs, which serve as starting points for viewing, adding, and editing information for an object. Different apps can have different sets of tabs. Add tabs for items you use frequently in any app.

1. Click the Plus icon (![+]( )) that appears to the right of your current tabs.
The All Tabs page appears. By default, it shows all the tabs you have available to view or add.

2. If you want to see a list of just the tabs for a specific app, select that app from the `View` drop-down.

3. Click **Customize My Tabs**.

4. In the `Custom App` dropdown, select the app where you want the tab to appear.
For example, if you want the Ideas tab to appear in your Marketing app, select `Marketing` and the Ideas tab will appear in that app only.

5. Use the **Add** and **Remove** arrows to move tabs from the Available Tabs list to the Selected Tabs list. Use the **Up** and **Down** arrows to change the order of the tabs.

6. Click **Save**.

7. If you added a tab to an app you're not actively using, open that app to see your new tab.

SEE ALSO:

> Viewing Available Salesforce Tabs

EDITIONS
Available in: Salesforce Classic
Available in: **All** editions except **Database.com**

Viewing Available Salesforce Tabs

To view all the tabs available to you in Salesforce, click the plus icon (+) next to the main tabs.
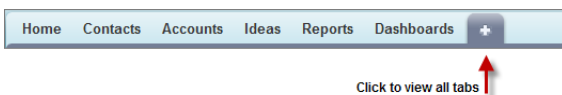
Using this page, you can:

- Click any of the tab names to quickly jump to that tab.
- If you have multiple apps, use the `View` drop-down list to see each app's logo and included tabs.
- Click **Customize My Tabs** to change how tabs display on your screen.

SEE ALSO:

> Adding Tabs for Frequently Used Items

EDITIONS
Available in: Salesforce Classic
Available in: **All** Editions except for **Database.com**

Accessibility

Accessibility Standards Overview

Learn about the standards Salesforce follows to design applications with accessibility in mind.

Salesforce is committed to providing on-demand enterprise applications accessible to all individuals, including users working with assistive devices, such as speech recognition software and screen readers. To help meet our goal of universal design, Salesforce follows the internationally recognized best practices in Section 508 of the Rehabilitation Act and the Web Content Accessibility Guidelines (WCAG) 2.0 Level AA to the extent possible.

Our Voluntary Product Accessibility Template (VPAT) is a tool used to document a product's conformance with the accessibility standards under Section 508 of the Rehabilitation Act and includes an accessibility assessment of our products.

> **EDITIONS**
>
> Available in: Salesforce Classic
>
> Available in: **All** Editions except **Database.com**

General Accessibility Requirements

Consider these requirements when using Salesforce.

- JavaScript support must be available and turned on.
- After a specified period of inactivity, a session timeout popup window automatically displays, prompting you to log out or continue working. Your administrator can set this time interval or disable it altogether. Your browser must allow pop-ups in Salesforce; otherwise you won't receive a warning about the upcoming timeout.
- Pilot and Beta features may not be accessible.

Recommended Browsers

For general accessibility testing, Salesforce uses the most current version of Mozilla® Firefox® and Microsoft® Internet Explorer® on Windows®, and Apple® Safari® on OS X®.

Contacting Salesforce with Accessibility Concerns

To access documentation and knowledge base articles or to contact customer support, click the **Help & Training** link at the top of any page.

To report any accessibility concerns or to request an alternate format of any document, send an email to accessibility@salesforce.com.

> 📝 **Note:** Customer support is not available for Personal and Developer Edition users. In addition, knowledge base access is not available for Developer Edition users. All users are welcome to contact accessibility@salesforce.com in English with any accessibility-related queries.

Accessibility Mode Overview

Learn how accessibility mode changes your experience using Salesforce.

Salesforce includes an alternate user interface mode that lets users with assistive devices, such as speech recognition software and screen readers, work with Salesforce more effectively. Most new features are designed with accessibility in mind and are inherently accessible in the standard mode. However, you may find that accessibility mode better suits your needs, particularly when using speech recognition or screen reading software to create reports and dashboards or interact with list views.

> **EDITIONS**
>
> Available in: Salesforce Classic
>
> Available in: **All** Editions except **Database.com**

Accessibility mode includes the full functionality of Salesforce with the modifications detailed here to create a better experience for users with assistive devices.

Accessibility Mode Features that Enhance Usability

- Access setup pages from a Setup link at the top of the page.
- Drop-down menus include a **Go** button that you select to navigate to the option you choose in the drop-down list.
- Menu buttons are rendered as a drop-down list with a **Go** button.
- Overlay pages are rendered as separate pop-up windows.
- The HTML editor is replaced with a text box. This text box only accepts HTML and does not recognize plain text entries like carriage returns. To separate content, you must use paragraph or line break HTML tags.
- When viewing a dashboard, the `View Dashboard` auto-complete filter is replaced with a standard drop-down menu.
- The **Edit Columns** link on the Manage Members page, accessible via the Manage Members drop-down on a campaign detail page, becomes a drop-down button. The Edit Columns overlay is replaced by a standard setup page.
- Clicking a requested meeting in the Open Activities related list and in some list views doesn't open the meeting detail page. Instead, a dialog opens that instructs you to contact the meeting organizer for details about the requested meeting.
- The **Turn My Email On** drop-down list on a Chatter group displays as a **Chatter Email Settings** link that opens your settings for receiving Chatter email.

Disabled Calendar Features

- Event detail overlays in the calendar view
- Drag-and-drop editing
- Drag-and-drop scheduling
- Click-and-create events
- The **New Meeting Request** button on the Open Activities related list

  Note: As a result, you can't request a meeting in accessibility mode, and the Requested Meetings subtab in the Calendar section of the Home tab doesn't display any meetings.

Disabled Report and Dashboard Features

- Drag-and-drop editing in the dashboard builder
- Creating and editing reports in report builder

  Note: Report builder is required to create or edit joined reports and reports containing cross filters or buckets. Users with accessibility mode enabled can run those reports, but can't create or edit them. To create reports in accessibility mode, you must use the report wizard.

- Drag-and-drop to move reports and dashboards between folders

Disabled List View Features

- Related list hover links
- These enhanced list features:
  - Inline editing
  - Rearranging and adjusting the width of columns

- Editing, deleting, or refreshing the current list view
- Changing the number of records displayed per page
- Jumping to a specific page of results

Other Disabled Features

- The **Check Spelling** button for solutions
- The latest Manage Members page
- The **Recent Tags** drop-down menu when you add the tag component to the sidebar
- When finding similar opportunities, the Match Criteria sidebar on the search results page
- The list of similar questions as you type a question in an answers community

  Tip: Users with accessibility mode enabled should use the search box on the Answers tab to see if their question has already been asked before they post their question.

Enable Accessibility Mode

Optimize your experience using Salesforce with assistive devices, such as speech recognition software and screen readers, by enabling accessibility mode.

1. From your personal settings, enter `Accessibility` in the `Quick Find` box, then select **Accessibility**. No matching results? Enter `Personal Information` in the `Quick Find` box, then select **Personal Information**.
2. Select `Accessibility Mode`.
3. Click **Save**.

SEE ALSO:

> Recommendations for Salesforce Accessibility
>
> Find Your Personal Settings

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions except **Database.com**

Recommendations for Salesforce Accessibility

Learn about Salesforce accessibility features designed for users working with assistive devices, such as speech recognition software and screen readers.

Here are some recommendations to help you work with Salesforce.

- Sighted Keyboard Users
- Screen Reader Users
- Deaf or Hearing Impaired Users
- Specific Color Users
- Low-Vision Users Who Need Magnification

SEE ALSO:

> Enable Accessibility Mode

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions except **Database.com**

Sighted Keyboard Users

These Salesforce features help ensure an accessible experience.

- Accessibility Mode helps you work more effectively with Salesforce, particularly reports, dashboards, and list views. See Accessibility Mode Overview on page 43 for more information.
- Selected areas on the screen include highlights to give you an on-screen visual indication of focus.
- These elements are identified in our page markup to help you interact with them.
  - Headings are marked up as headings rather than field set and legend elements for grouping form controls.
  - The main heading for the page (typically at the start of the main content area) is a level 1 heading. You can shift to this heading with a shortcut key.
  - Data tables have data table markup (except enhanced listviews in Standard Mode only) to aid identification of headers for each cell.
  - Lists provided in the main content area are marked up as lists.
- A skip link (the first keyboard-focusable link on each page) allows you to shift the focus to the start of the main content area. This generally bypasses the navigational menus before the main content area, greatly reducing the number of tab presses that would otherwise be required to reach the main content area of the page.
- Keyboard focus is placed inside of dialog boxes when they open and will remain locked there until the dialog is closed.
- On edit pages, the keyboard focus defaults to the first editable field on the page. When creating or editing a task or event, the keyboard focus defaults to the Subject field, regardless of its location on the page.
- Buttons, links, and fields that aren't currently active are labeled with a "disabled" attribute. For example, when using a wizard with multiple steps, some buttons may be disabled until you select a specific option.

Screen Reader Users

Salesforce on-demand applications are designed to take advantage of the latest features of the most widely used screen reading software. Although you might find that many browser and screen reader combinations work well, we recommend you use the most current versions of Mozilla® Firefox® and JAWS® or NVDA with Salesforce.

These Salesforce features help ensure an accessible experience:

- Accessibility Mode helps you work more effectively with Salesforce, particularly reports, dashboards, and list views. See Accessibility Mode Overview on page 43 for more information.
- Important images have text alternatives equivalent to the purpose of the image; non-important images have empty text equivalents or are implemented through CSS. Images showing detailed information are also links to source data. For example, Dashboards contain charts and graphs that are visual in nature. To access the report data used to generate the chart or graph, simply select the dashboard component.

  Note: The underlying report may contain additional data than what is represented in the dashboard component. In addition, the underlying report may contain some data that you don't have access to view due to sharing settings.

- These elements are identified in our page markup to help you interact with them.
  - Headings are marked up as headings rather than field set and legend elements for grouping form controls.
  - The main heading for the page (typically at the start of the main content area) is a level 1 heading. You can shift to this heading with a shortcut key.
  - Data tables have data table markup (except enhanced listviews in Standard Mode only) to aid identification of headers for each cell.
  - Lists provided in the main content area are marked up as lists.

- A skip link (the first keyboard-focusable link on each page) allows you to shift the focus to the start of the main content area. This generally bypasses the navigational menus before the main content area, greatly reducing the number of tab presses that would otherwise be required to reach the main content area of the page.

- Keyboard focus is placed inside of dialog boxes when they open and will remain locked there until the dialog is closed.

- On edit pages, the keyboard focus defaults to the first editable field on the page. When creating or editing a task or event, the keyboard focus defaults to the Subject field, regardless of its location on the page.

- Buttons, links, and fields that aren't currently active are labeled with a "disabled" attribute. For example, when using a wizard with multiple steps, some buttons may be disabled until you select a specific option.

In addition, we recommend you enable these personalized web settings in your screen reader:

- Set pages to refresh automatically.

- Turn on live region update announcements.

- Set text links to show titles. This setting ensures the screen reader announces information provided through a link's title attribute, such as a warning that a new window will open.

- Set headings to announce Headings and Levels. Heading markup is used to provide context as well as navigation.

- Add common signs, such the @ (at) sign for mentioning people in Chatter posts and comments, to your screen reader dictionary to customize how they're announced by default.

Deaf or Hearing Impaired Users

Salesforce provides video demos hosted on YouTube. To view synchronized captions for videos, click `Watch on YouTube.com` in the bottom-right corner of embedded videos.

Specific Color Users

Browser and operating system settings don't change the colors displayed within images, and Salesforce implements many images as background images (which aren't displayed when browser and operating system settings for color display are in effect). If you rely on browser settings and your operating system to change your display to a particular color combination, you may need to:

- Display image text alternatives to access information provided by important images.

- Override our CSS for these classes: assistiveText, zen-assistiveText. Then set your browser settings according to your preferences.

In addition:

- Some charts (for example, in reports and dashboards) rely on color to display information. If you have trouble interpreting the information in charts, select `Color-Blind Palette on Charts` from your personal detail page. This option sets an alternate color palette for charts that has been optimized for use by color-blind users. Dashboard emails don't use the alternate palette. You can also click a chart to view its source report.

- Dashboards contain charts and graphs that are visual in nature. To access the report data used to generate the chart or graph, simply select the dashboard component.

    ☑ Note: The underlying report may contain additional data than what is represented in the dashboard component. In addition, the underlying report may contain some data that you don't have access to view due to sharing settings.

Low-Vision Users Who Need Magnification

Salesforce supports standard OS-level, browser, and third-party magnification tools. Adjust the zoom setting to suit your needs.

These elements are identified in our page markup. You can alter the styles for these elements to help you identify them.

- Headings are marked up as headings rather than field set and legend elements for grouping form controls.

- The main heading for the page (typically at the start of the main content area) is a level 1 heading. You can shift to this heading with a shortcut key.
- Data tables have data table markup (except enhanced listviews in Standard Mode only) to aid identification of headers for each cell.
- Lists provided in the main content area are marked up as lists.

Setup FAQs

View and Display FAQ

- Which Languages Does Salesforce Support?
- Why can't I see some buttons and links?
- Why can't I view Salesforce popup windows such as lookup dialogs and the Help & Training window?
- Why did my data disappear when I pressed the Backspace key while editing a record?
- Can I change or delete the drop-down list of entries that appears when I edit a text field?

Which Languages Does Salesforce Support?

Salesforce offers three levels of language support: fully supported languages, end-user languages, and platform-only languages. Each language is identified by a two-character language code, such as `en`, or a five-character locale code, such as en_AU.

> Note: Setting a default locale is different from setting a default language.

In addition to the Salesforce language support, you can localize your organizations in two ways. The Translation Workbench lets you specify languages you want to translate, assign translators to languages, create translations for customizations you've made to your Salesforce organization, and override labels and translations from managed packages. Everything from custom picklist values to custom fields can be translated so your global users can use all of Salesforce in their language.

The second option is to rename tabs and fields in Salesforce. If your custom application uses only a few standard Salesforce tabs and fields, you can translate them.

Fully Supported Languages

You can change the language for all features, including Help, to one of the following fully supported languages from Setup by entering `Company Information` in the `Quick Find` box, selecting **Company Information**, then selecting **Edit**.

- Chinese (Simplified): `zh_CN`
- Chinese (Traditional): `zh_TW`
- Danish: `da`
- Dutch: `nl_NL`
- English: `en_US`
- Finnish: `fi`
- French: `fr`
- German: `de`
- Italian: `it`
- Japanese: `ja`
- Korean: `ko`

- Norwegian: `no`
- Portuguese (Brazil): `pt_BR`
- Russian: `ru`
- Spanish: `es`
- Spanish (Mexico): `es_MX`
- Swedish: `sv`
- Thai: `th`

> 📝 Note:
>
> - Spanish (Mexico) falls back to Spanish for customer-defined translations.
> - Even though the Salesforce user interface is fully translated to Thai, Help remains in English.

End-User Languages

End-user languages are useful if you have a multilingual organization or partners who speak languages other than your company's default language. For end-user languages, Salesforce provides translated labels for all standard objects and pages, *except* administrative pages, Setup, and Help. When you specify an end-user language, labels and Help that aren't translated appear in English. End-user languages are intended only for personal use by end users. Don't use end-user languages as corporate languages. Salesforce doesn't provide customer support in end-user languages.

End-user languages include:

- Arabic: `ar`
- Bulgarian: `bg`
- Croatian: `hr`
- Czech: `cs`
- English (UK): `en_GB`
- Greek: `el`
- Hebrew: `iw`
- Hungarian: `hu`
- Indonesian: `in`
- Polish: `pl`
- Portuguese (Portugal): `pt_PT`
- Romanian: `ro`
- Slovak: `sk`
- Slovenian: `sl`
- Turkish: `tr`
- Ukrainian: `uk`
- Vietnamese: `vi`

> 📝 Note: Salesforce provides limited support for right-to-left languages—Arabic and Hebrew—for the following features.
>
> - Live Agent
> - Cases
> - Accounts

These features are not supported in Lightning Experience, the Salesforce1 mobile app, any other mobile app or mobile browser, or any user interface except Salesforce Classic. There is no guarantee that right-to-left languages function correctly with any other Salesforce features. There are no plans to expand the list of supported features.

Features that aren't supported for right-to-left languages include, but are not limited to, the following.

- Report Builder
- Generating quote PDFs
- Customizable forecasting
- Emails
- Salesforce Knowledge
- Feeds
- Communities

The absence of a feature from this list does not imply support. Only Live Agent, Cases, and Accounts are supported with right-to-left languages.

Platform-Only Languages

In situations where Salesforce doesn't provide default translations, use platform-only languages to localize apps and custom functionality that you've built on the Salesforce App Cloud. You can translate items such as custom labels, custom objects, and field names. You can also rename most standard objects, labels, and fields. Informative text and non-field label text aren't translatable.

Platform-only languages are available in all places where you can select a language in the application. However, when you select a platform-only language, all standard Salesforce labels default to English or, in select cases, to an end-user or fully supported language.

When you specify a platform-only language, labels for standard objects and fields fall back to English, except:

- English (Australia), English (India), English (Malaysia), and English (Philippines) fall back to English (UK).
- German (Austria) and German (Switzerland) fall back to German.
- French (Canada) falls back to French.
- Romanian (Moldova) falls back to Romanian.
- Montenegrin falls back to Serbian (Latin).
- Portuguese (Portugal) falls back to Portuguese (Brazil).

The following platform-only languages are currently supported.

- Albanian: `sq`
- Arabic (Algeria): `ar_DZ`
- Arabic (Bahrain): `ar_BH`
- Arabic (Egypt): `ar_EG`
- Arabic (Iraq): `ar_IQ`
- Arabic (Jordan): `ar_JO`
- Arabic (Kuwait): `ar_KW`
- Arabic (Lebanon): `ar_LB`
- Arabic (Libya): `ar_LY`
- Arabic (Morocco): `ar_MA`
- Arabic (Oman): `ar_OM`
- Arabic (Qatar): `ar_QA`

- Arabic (Saudi Arabia): `ar_SA`
- Arabic (Sudan): `ar_SD`
- Arabic (Syria): `ar_SY`
- Arabic (Tunisia): `ar_TN`
- Arabic (United Arab Emirates): `ar_AE`
- Arabic (Yemen): `ar_YE`
- Armenian: `hy`
- Basque: `eu`
- Bosnian: `bs`
- Bengali: `bn`
- Chinese (Simplified—Singapore): `zh_SG`
- Chinese (Traditional—Hong Kong): `zh_HK`
- English (Australia): `en_AU`
- English (Canada): `en_CA`
- English (Hong Kong): `en_HK`
- English (India): `en_IN`
- English (Ireland): `en_IE`
- English (Malaysia): `en_MY`
- English (Philippines): `en_PH`
- English (Singapore): `en_SG`
- English (South Africa): `en_ZA`
- Estonian: `et`
- French (Belgium): `fr_BE`
- French (Canada): `fr_CA`
- French (Luxembourg): `fr_LU`
- French (Switzerland): `fr_CH`
- Georgian: `ka`
- German (Austria): `de_AT`
- German (Luxembourg): `de_LU`
- German (Switzerland): `de_CH`
- Hindi: `hi`
- Icelandic: `is`
- Irish: `ga`
- Italian (Switzerland): `it_CH`
- Latvian: `lv`
- Lithuanian: `lt`
- Luxembourgish: `lb`
- Macedonian: `mk`
- Malay: `ms`
- Maltese: `mt`

- Romanian (Moldova): `ro_MD`
- Montenegrin: `sh_ME`
- Romansh: `rm`
- Serbian (Cyrillic): `sr`
- Serbian (Latin): `sh`
- Spanish (Argentina): `es_AR`
- Spanish (Bolivia): `es_BO`
- Spanish (Chile): `es_CL`
- Spanish (Colombia): `es_CO`
- Spanish (Costa Rica): `es_CR`
- Spanish (Dominican Republic): `es_DO`
- Spanish (Ecuador): `es_EC`
- Spanish (El Salvador): `es_SV`
- Spanish (Guatemala): `es_GT`
- Spanish (Honduras): `es_HN`
- Spanish (Nicaragua): `es_NI`
- Spanish (Panama): `es_PA`
- Spanish (Paraguay): `es_PY`
- Spanish (Peru): `es_PE`
- Spanish (Puerto Rico): `es_PR`
- Spanish (United States): `es_US`
- Spanish (Uruguay): `es_UY`
- Spanish (Venezuela): `es_VE`
- Tagalog: `tl`
- Tamil: `ta`
- Urdu: `ur`
- Welsh: `cy`

Why can't I see some buttons and links?

Buttons and links only display for users who have the appropriate permissions to use them. For example, users who do not have the "Delete" permission on opportunities do not see the **Delete** button on an opportunity detail page nor do they see the **Del** link on an opportunity related list.

Why can't I view Salesforce popup windows such as lookup dialogs and the Help & Training window?

If your browser's popup blocker settings are configured for maximum security, you won't be able to view any popup windows within Salesforce—even those that provide necessary functionality such as the calendar popup for choosing a date on an activity, lookup dialogs for selecting a record, the Help & Training window, and more.

To test your popup settings:

1. From your personal settings, enter `Reminders` in the `Quick Find` box, then select **Reminders & Alerts**. No results? Enter `Personal Information` in the `Quick Find` box, then select **Personal Information**.

2. Click **Preview Reminder Alert**.

To allow popup windows for Salesforce, add Salesforce as a trusted site within your browser's popup blocker settings. Consult the online help for your browser for specific instructions.

Some browser add-ons, like the Google toolbar, also have popup blocking. Consult your software documentation on those products for details on how to configure them to allow popup windows from Salesforce.

SEE ALSO:

    Find Your Personal Settings

Why did my data disappear when I pressed the Backspace key while editing a record?

Some versions of Internet Explorer use the Backspace key as a keyboard shortcut for the browser's Back button. When you press the Backspace key and your cursor is not within a text field, the browser goes back to the previous page, making it appear that your data has been lost. To retrieve your data and return to the page you were working on, click your browser's Forward button.

Can I change or delete the drop-down list of entries that appears when I edit a text field?

No. These auto-complete entries that appear when you are editing certain text fields are a feature of Internet Explorer. The browser remembers text you have entered previously and provides a list of those entries for you to automatically complete the field. If you would like to turn this feature off, click **Tools** on your browser's menu bar, select **Internet Options**, click the **Content** tab, and then choose the **AutoComplete** button to change your browser's settings.

Navigate Salesforce

Open a Different App

Not finding the feature you need to use? Maybe it's in another app. Check out the drop-down menu to see all the apps available to you, and select the one you need.

To use features available in a different Salesforce app than the one you have open, you need to open the other app. Other apps include the Salesforce Marketing app, the Call Center app, and any custom apps for your organization.

Your organization may also use connected apps. Connected apps include productivity apps such as Gmail™ and Microsoft Office 365™, or other apps to help you get your work done. If your administrator has added these apps to your organization, they appear in the App Launcher.

IN THIS SECTION:

    Open a Different Salesforce App in Salesforce Classic

    It's easy to navigate between Salesforce apps, such as the Sales app and the Marketing app.

    Open an App from the App Launcher in Salesforce Classic

    Navigate between your Salesforce apps and connected apps from a single menu.

Open a Different App in Lightning Experience

Use Search or the App Launcher to navigate between all of your apps.

Open a Different Salesforce App in Salesforce Classic

It's easy to navigate between Salesforce apps, such as the Sales app and the Marketing app.

📝 **Note:** These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.

To use features available in a different Salesforce app than the one you have open, you need to open the other app. You can have one app open at a time, and the app you have open will open the next time you log in to Salesforce.

To open an app: In the upper-right corner of any Salesforce page, select the app you want from drop-down app menu.
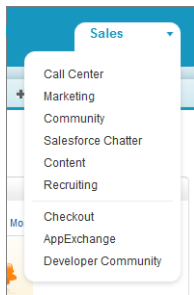
EDITIONS

Available in: Salesforce Classic

Available in: **All** editions except **Database.com**

USER PERMISSIONS

To use an app:
- Access to that app as specified in your user profile or permission set.

Open an App from the App Launcher in Salesforce Classic

Navigate between your Salesforce apps and connected apps from a single menu.

📝 **Note:** These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.

You must have access to a Salesforce app or connected app to see and open it from the App Launcher.

To open the App Launcher: select the App Launcher on any Salesforce page from the Force.com App Menu.

EDITIONS

Available in: Salesforce Classic

Available in:
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To see the App Launcher:
- "Use Identity Features"
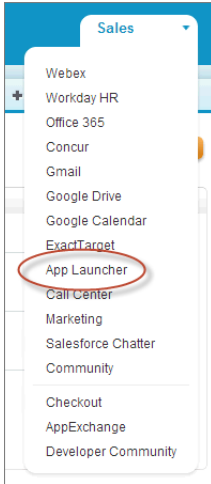
In the App Launcher, click an installed app icon to launch the app.
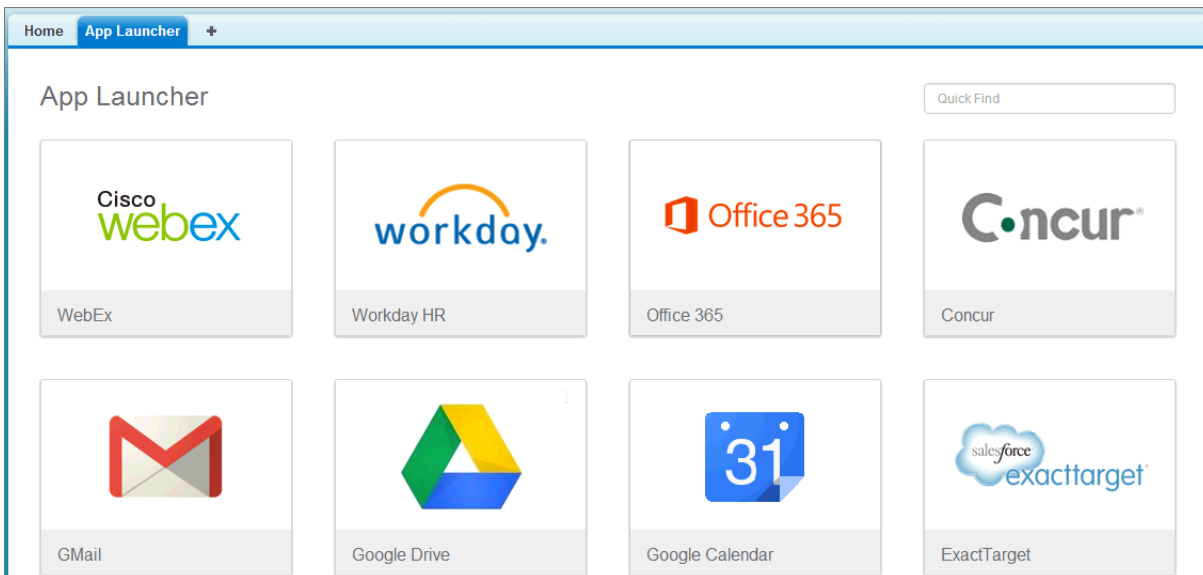
Open a Different App in Lightning Experience

Use Search or the App Launcher to navigate between all of your apps.

> **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

To open an app, you have 2 options.

- Use the `Search Salesforce` box at the top of any Salesforce page. Start typing the name of the app, such as "Marketing," and click the result as it appears. This search works for custom apps and connected apps, too. The search doesn't allow wildcard character searches for apps. However, partial words do generate app search results as you type (such as "Mark").

- In the upper-right corner of any Salesforce page, click the App Launcher icon.

The App Launcher displays all of your available Salesforce apps, and any connected apps your administrator has installed.
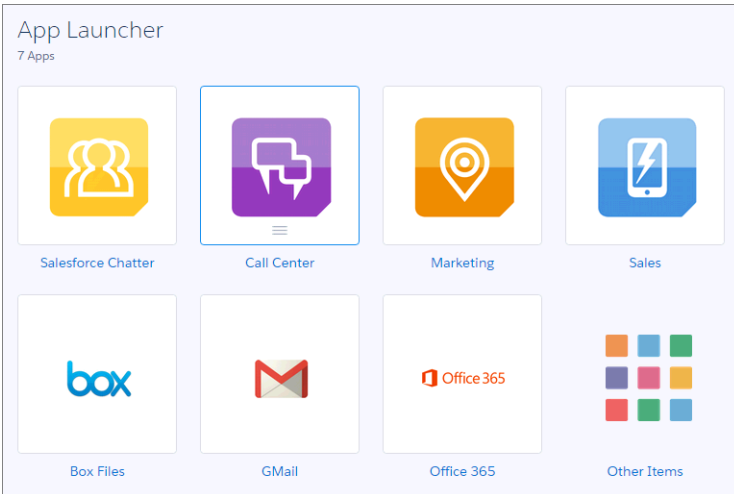
You can have one Salesforce app open at a time, and the app you have open will open the next time you log on to Salesforce.

You can open multiple connected apps simultaneously.Connected apps are apps your administrator installs to help you get your work done, such as Gmail™ and Microsoft Office 365™. Each connected app opens in a new window, so set your pop-up blocker to allow pop-ups from here, or the connected app doesn't open.

Drag an app icon from one position to another, and sort them by the apps you use most.

Don't see what you want? Click **Other Items** to see more apps, objects, and items. Or, ask your administrator if more apps are available.

Understanding Salesforce Pages

Salesforce apps are made up of tabs and pages. Standard objects such as Accounts, Contacts, and Leads, and other features such as Chatter typically have tabs, and from a tab, you navigate through pages to interact with the features you're using. For example, if you want to create an account record, you'll click the Accounts Tab, and land on the Accounts Home page. Click **New** to open the Account Edit page where you'll enter information for the account. Click **Save**, and you'll see the Account's Detail page. Return to the Accounts Home page and the new account is listed.

Salesforce tabs can have multiple types of pages, including Home, Edit, and Detail pages, and you can create list views for some objects. Chatter has one primary page type: a feed. And Data.com has a search interface. Dashboards and reports have their own page styles, as well.

Your system administrator typically sets up page layouts for standard objects and enables the navigation features your organization can use, but interacting with Salesforce is easier if you understand the most common page elements for the most frequently used objects. They include:

1. A *tag* bar, where you can view and add tags for a record.
2. A *feed*, where you can add and view comments about a record.
3. A *sidebar*, where you can do things like search and quickly create new records.
4. *Sections* for the record, with key fields and links.
5. *Related lists*, which group and display links to other records associated with the one you're viewing. You can change the order of related lists on your page.
6. Various *links* that help you move around the page or go to different pages or external sites.

Let's look at these elements on an account detail page.

SEE ALSO:

Tags Overview

Understanding the Salesforce Sidebar

Navigating Object Home Pages

Home Tab Overview

Understanding the Salesforce Sidebar

The sidebar column that appears on the left side of most Salesforce pages provides convenient access to the following links and commands.

- Search

  Use the header search box, if you don't have sidebar search.

- The Tags link and Recent Tags drop-down list
- The Divisions drop-down list
- The Create New drop-down list
- A Calendar shortcut to your last used calendar view
- The Recent Items list
- Messages and Alerts
- Custom Links
- A shortcut to the Recycle Bin

The options in your sidebar vary depending on the features you have enabled and whether your administrator has customized the page layout.

Showing and Hiding the Collapsible Sidebar

If your administrator has enabled the Collapsible Sidebar, you can show or hide the sidebar as needed.

> **Note:** Call center users won't see incoming calls if they collapse the sidebar.

Click the edge of the sidebar to open or close the sidebar as needed.
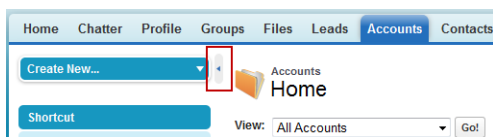
Working with Related Items Directly from the Record You're Viewing

On Salesforce records, links and details for associated records are grouped within related lists. Some related lists let you perform common tasks for the related object, like creating new records or attaching files.

For example, the Lead record offers a number of related lists, including Open Activities, which lists open activities and key activity fields. On this related list, you can create a new task, a new activity, or a new meeting request. When a task related to the lead is closed, a link to that task appears in the Lead record's Activity History related list, which displays the same key fields as Open Activities, and offers other common tasks.

The related lists you can view and use are determined by:

- Your user permissions

- User interface and page layout customizations made by your Salesforce administrator
- Personal customizations you can make

It's easy to arrange and access related lists. Here's how.
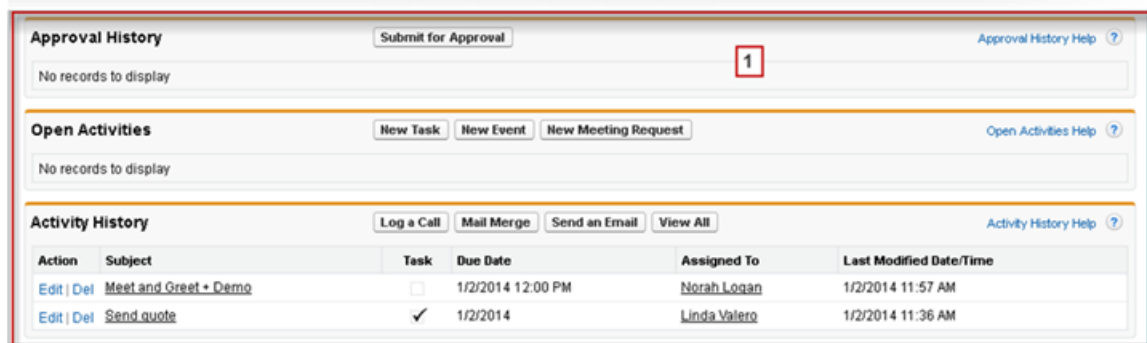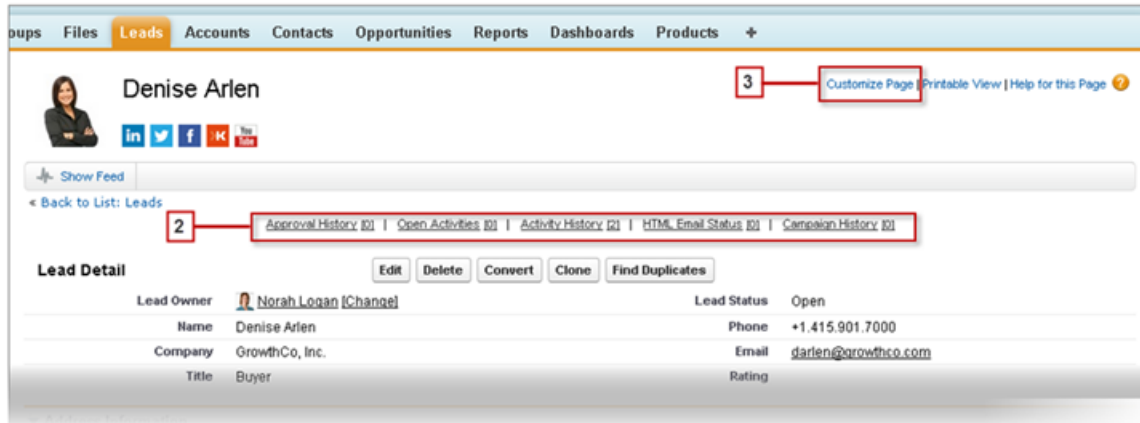
1. Scroll the page to find the related list you need.

2. If related list hover links are enabled in your organization, click a link to view the list in a pop-up.

3. Click **Customize Page** to select and arrange the available related lists you want to see.

Opening Items You've Recently Viewed

In the Recent Items section of the Salesforce sidebar, you'll find a list of up to 10 items (records, documents, custom objects, and the like) you've most recently added, edited, or viewed.

To open any item's detail or edit page, just click its link.

> 💡 Tip: If your organization has enabled hover details, you can hover your mouse over any item in the Recent Items list to view key information about the record before clicking into that record's detail or edit page.

> ✏️ Note: Your Recent Items may show fewer than 10 items if you have recently deleted any of your recently viewed items. Likewise, the Recent lists on the tab home pages (for example, the Recent Leads list) may show fewer than 10 or 25 items if you have recently deleted items.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

Working with Enhanced Lists

Enhanced lists give you the ability to quickly view, customize, and edit list data to speed up your daily productivity. They must first be enabled by your administrator for you to take advantage of them.

Enhanced lists allow you to:

- Navigate through the list results by clicking the first page icon (**<<**), **Previous**, **Next**, or the last page icon (**>>**) at the bottom of the list.

- Jump to a specific page of results by entering a number in the text box in the lower right corner, and then pressing ENTER.

- Create a new view by clicking **Create New View**. Edit, delete or refresh the current view by clicking **Edit**, **Delete**, or ⟳, respectively.

- Change the number of records displayed per page. Click ▼ in the lower left corner of the list and select the desired setting. You can view 10, 25, 50, 100, or 200 records at a time. When you change this setting, you return to the first page of list results.

  Changing your preference for the number of records displayed per page applies to all lists in all Salesforce apps, not just the one currently displayed. In addition, if you change your preference to 200, a message warns you of possible performance degradation.

- Change the width of a column by dragging the right side of the column heading with your mouse. Any changes you make to column widths are specific to that list only, and are preserved when you next view the list.

  If you add or remove columns from a list, any column width customizations for that list are discarded automatically.

- Change the order in which a column is displayed by dragging the entire column heading with your mouse to the desired position. If you have permission to edit the list definition, your changes are automatically saved for all users who see the list. If you do not have permission to edit the list definition, your changes are discarded when you navigate away from the page.

- Change the number and order of columns displayed by clicking **Edit** next to the list drop-down in the upper left corner.

- If your administrator has enabled inline editing for your organization, edit single records directly from the list by double-clicking on individual field values. If your administrator has granted you the "Mass Edit from Lists" permission, you can also edit up to 200 records at a time.

- On account, contact, and lead list views, click the 🗓 **Open Calendar** link at the bottom of the page to display a weekly view of a calendar underneath the list. Then, you can drag a record from the list to a time slot on the calendar to quickly create an event associated with the record. Note that your administrator controls the availability of the Drag-and-Drop Scheduling feature.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions except **Database.com**

USER PERMISSIONS

To use inline editing in an enhanced list:
- "Mass Edit from Lists"

Navigating Long Lists

Many list pages in Salesforce include the following tools for managing a large amount of data:

- To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views.

  To edit or delete any view you created, select it from the `View` drop-down list and click **Edit**.

- At the top of a list, click a letter to show items that correspond to that letter, or click **Other** to show items whose names begin with numbers or symbols. Click **All** to display all items that match the criteria of the current view.

- To sort list view items by the data in a particular column, click that column's heading. This sorts text data alphabetically and numerical data in ascending order. Dates are sorted with the most recent date first. To reverse the sort order, click the column heading a second time.

EDITIONS

Available in: Salesforce Classic

Available in all editions

> Note: You can sort by any custom field except multi-select picklists. User list views are not sorted for organizations with more than two million users. Organizations with more than 2 million users can contact Salesforce to re-enable sorting.

- Click the **Previous Page** or **Next Page** link to go to the previous or next set of items in the current view.

- At the bottom of a list, click the **fewer** or **more** link to decrease or increase the number of items per page.

In some related lists with many items, the following links are available:

- Click **Show [number] more** to increase the number of items in the list.

- Click **Go to list** to display a secondary page of the entire related list.

Changing Your Working Division

You can change which records you are viewing by selecting the division you are currently working in.

You can change the division you are working in at any time and override the default division you were originally assigned for some searches and reports.

- From the Divisions field in the sidebar, select the division you want to work in.

> Note: Records you create are assigned to you default division, not to your working division. You can explicitly set a division other than your default division when you create the record.

<div style="float:right">

EDITIONS

Available in: Salesforce Classic

Available in:
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

</div>

Manage Your Work from the Home Tab

Home Tab Overview

From the Home tab, you can:

- Create a Chatter post (if your organization uses Chatter)

- View dashboard snapshots

- View your tasks and calendar

- Search the feed (🔍)

You can also use the sidebar components, such as Create New, Recent Items, and Custom Links, that you'll also see on other Salesforce pages. Your Home tab layout, sidebar components, and links are enabled and configured by your administrator.

Alert banners may appear on the Home tab to let you know when updates are available for desktop clients such as Connect Offline.

SEE ALSO:

Navigating Object Home Pages

<div style="float:right">

EDITIONS

Available in: Salesforce Classic

The available tabs and options in the Create New drop-down list vary according to which permissions you have and which Salesforce edition you are using.

</div>

Changing Your Home Tab Dashboard

Your administrator can create customized Home tab pages that display customized components such as a dashboard snapshot or your company logo. If your Home tab contains a dashboard snapshot, you can change the dashboard settings.

Click **Customize Page** in the Dashboard section of the Home tab if yours contains a dashboard. Use this page to select a different dashboard to display on the Home tab. Click **Refresh** to refresh the data in your dashboard.

Using Your Tasks and Calendar on the Home Page

> **Note:** The My Tasks and Calendar sections display on the Home page if they are included as components on your Home page layout.

From the Home page, you can view, create, and edit tasks and events. If you have Salesforce for Outlook installed, you may be able to sync your Outlook items with Salesforce so they appear in the My Tasks and Calendar sections.

In the My Tasks section, you can:

- Click **New** to create a task.
- View a list of tasks assigned to you. Up to fifteen tasks can be displayed; to view all your tasks, click **View More**.

    ↻ identifies tasks that are part of a recurring series.

- Choose a time frame from the drop-down list to change which tasks display.
- Assign unresolved emails to related records; to view all your unassigned emails, click **My Unresolved Items**.
- If your organization has enabled hover links for the My Tasks list, hover your mouse over the subject of a task to see the details of the task in an overlay. Alternatively, click the subject of a task to open the detail page of that task.
- Click **X** to close a task.

In the Calendar section, you can:

- Click **New Event** to create a new event.
- Click the Scheduled Meetings subtab to view a list of the events you have scheduled for the next seven days. This tab displays a maximum of 50 events per day.

    - ↻ identifies events that are part of a recurring series.
    - 👥 identifies events with invitees. Events owned by multiple people aren't available in Personal Edition.
    - If your organization has enabled home page hover links for events, hover your mouse over the subject of an event to display the details of the event in an interactive overlay. Alternatively, click the subject of an event to open the detail page of that event.

- Click the Requested Meetings subtab to view meetings you have requested but not confirmed. This tab displays a maximum of 100 requested meetings.

    - Click the subject of the meeting to open its detail page where you can cancel and reschedule the meeting.
    - The Responses column shows the number of invitees that have responded to your meeting request.
    - Once you confirm a meeting, it appears on the Scheduled Meetings subtab.

If the Requested Meetings subtab doesn't appear, ask your Salesforce administrator to add it to the Calendar section.

- View a small calendar of the current month. To change which month appears, click ◄ and ►.
- Navigate to different views of your calendar and click the icons underneath the small monthly calendar as appropriate.

Viewing Custom Links on the Home Tab

This section appears on the Home tab depending on your customized home page layout.

The Custom Links section of the Home tab contains links to websites or Salesforce pages that are useful for everyone in your organization. Your administrator sets which links appear in this section.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions except **Database.com**

Viewing Messages and Alerts

The Messages and Alerts section of the Home tab sidebar displays announcements customized by your organization's administrator. The Messages and Alerts section is not available in Personal Edition.

SEE ALSO:

    Check for Desktop Client Updates

EDITIONS

Available in: Salesforce Classic

Available in:
- Contact Manager
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Performance Chart

Use the performance chart on the Home page in Lightning Experience to track your sales performance or the performance of your sales team against a customizable sales goal.

The performance chart displays data based on your sales team's opportunities if you have an associated team. Otherwise, the chart displays opportunities you own. Only opportunities for the current sales quarter that are closed or open with a probability over 70% are displayed.

- Closed—The sum of your closed opportunities.
- Open (>70%)—The sum of your open opportunities with a probability over 70%. The blue line in the chart is the combined total of the closed opportunities and open opportunities with a probability over 70%.
- Goal—Your customizable sales goal for the quarter. This field is specific to the performance chart and has no impact on forecast quotas or any other type of goal. Click 🖉 to set the goal.

EDITIONS

Available in: Lightning Experience

Available in:
- Professional
- Enterprise
- Performance
- Unlimited
- Developer
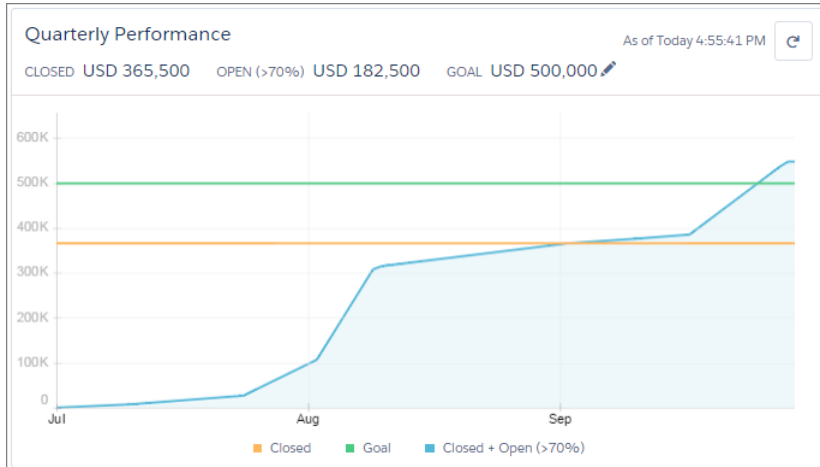
Hover over the chart to see the closed and committed opportunity amounts for different dates. If you hover over a date when an opportunity was closed or set to a probability over 70%, a blue dot appears and a window displays more opportunity details.

SEE ALSO:

[The Assistant](#)

The Assistant

Use the Assistant on the Home page in Lightning Experience to view your most important tasks and updates over the course of your day.

Click different tasks, leads, or opportunities to go to the record's detail page. You can also click the box within task items to close them.

Items in the Assistant appear in the following order:

- Tasks that are overdue
- Tasks due today
- Leads assigned to you today
- Opportunities with overdue tasks
- Opportunities with no activity in 30 days
- Opportunities with no open activity

Note: If you don't have access to activities on opportunities or if the opportunity pipeline is off, you instead see items for opportunities that have close dates over the next 90 days.

SEE ALSO:

Performance Chart

Manage Relationships and Data with Records

View and Share Records

Finding and Viewing Records and Data

Use tabs, search, or lists to look at your data.

Much of your Salesforce data is stored in individual *records*, and organized within objects. For example, the Account object presents all of your account records. If the Acme company is one of your accounts, you'll have an account record for Acme.

When you're working with records, it's important to remember that the types of records you can create, view, edit, and delete are determined by administrator settings, such as a user profile or permission set. Your access to individual records may be determined by other configurations, such as sharing settings. And your access to fields on types of records may be controlled by field-level security. Work with your administrator to make sure you have access to the records and data you need.

There are a few easy ways to find and view your records.

- From a tab, such as Accounts or Contacts, start from the default view and click **Go!** or select a different view.

The resulting page you see is called a *list view*.

- Search for a record using keywords, such as a name or address stored in the record. Use the search bar in the banner displayed on most pages.
- On many records, below the main page sections, look for related lists, which identify records that are associated with the record you're currently viewing. For example, an account record probably has a related list of contacts at that account.

SEE ALSO:

Understanding Salesforce Pages

Get to Know Your Salesforce Admin

Granting Access to Records

You can use manual sharing to give specific other users access to certain types of records, including accounts, contacts, and leads. In some cases, granting access to one record includes access to all its associated records.

For example, if you grant another user access to an account, the user will automatically have access to all the opportunities and cases associated with that account.

To grant access to a record, you must be one of the following users.

- The record owner
- A user in a role above the owner in the hierarchy (if your organization's sharing settings control access through hierarchies)
- Any user granted "Full Access" to the record
- An administrator

Walk Through It: grant users access to your account

To grant access to a record using a manual share:

1. Click **Sharing** on the record you want to share.

2. Click **Add**.

3. From the `Search` drop-down list, select the type of group, user, role, or territory to add.

    Depending on the data in your organization, your options can include:

Type	Description
Managers Groups	All direct and indirect managers of a user.
Manager Subordinates Groups	A manager and all direct and indirect reports who he or she manages.
Public Groups	All public groups defined by your administrator.
Personal Groups	All personal groups defined by the record owner. Only the record owner can share with his or her personal groups.
Users	All users in your organization. Does not include portal users.
Roles	All roles defined for your organization. This includes all of the users in each role.
Roles and Subordinates	All of the users in the role plus all of the users in roles below that role in the hierarchy. Only available when no portals are enabled for your organization.
Roles and Internal Subordinates	All roles defined for your organization. This includes all of the users in the specified role plus all of the users in roles below that role, excluding partner portal and Customer Portal roles.
Roles and Internal and Portal Subordinates	Adds a role and its subordinate roles. Includes all of the users in that role plus all of the users in roles below that role. Only

Type	Description
	available when a partner or Customer Portal is enabled for your organization. Includes portal roles and users.
Territories	For organizations that use territory management, all territories defined for your organization, including all users in each territory.
Territories and Subordinates	For organizations that use territory management, all users in the territory plus the users below that territory.

> **Note:** In organizations with more than 2,000 users, roles, and groups, if your query doesn't match any items in a particular category that category won't show up in the Search drop-down menu. For example, if none of your group names contain the string "CEO," after searching for "CEO" you'll notice the Groups option no longer appears in the drop-down. If you enter a new search term, all of the categories will still be searched even if they don't appear in the list. You can repopulate the drop-down by clearing your search terms and pressing **Find**.

4. Choose the specific groups, users, roles, or territories who should have access by adding their names to the Share With list. Use the **Add** and **Remove** arrows to move the items from the Available list to the Share With list.

5. Choose the access level for the record you are sharing and any associated records that you own.

> **Note:**
> - If you're sharing an opportunity or case, those you share it with must also have at least "Read" access to the associated account (unless you are sharing a case via a case team). If you also have privileges to share the account itself, those you share it with are automatically given "Read" access to the account. If you do not have privileges to share the account, you must ask the account owner to give others "Read" access to it.
> - `Contact Access` is not available when the organization-wide default for contacts is set to Controlled by Parent.
> - For sharing rules that specify access for associated object records, the given access level applies to that sharing rule only. For example, if an account sharing rule specifies Private as the access level for associated contacts, a user may still have access to associated contacts via other means, such as organization-wide defaults, the "Modify All Data" or "View All Data" permission, or the "Modify All" or "View All" permission for contacts.

6. When sharing a forecast, select `Submit Allowed` to enable the user, group, or role to submit the forecast.

7. Select the reason you're sharing the record so users and administrators can understand.

8. Click **Save**.

SEE ALSO:

Editing or Deleting Record Access

Understanding Your Access to UI Elements, Records, and Fields

Viewing Which Users Have Access to Your Records

Record Access Levels

Editing or Deleting Record Access

Edit or remove access to a record.

Manual shares are deleted automatically if the record owner is changed or if they are no longer needed, such as when the organization-wide defaults or sharing rules grant a similar or wider access than the manual share.

To edit or delete access to a record:

1. Open the record for which you want to edit or delete.

2. Click **Sharing** on the record.

3. Click **Edit** or **Del** next to the group, user, role, or territory whose access you want to modify or remove.

SEE ALSO:

    Granting Access to Records

    Record Access Levels

Viewing Which Users Have Access to Your Records

After you have granted access to a record you own, you can view a list of users who have access to the record and its related information and records, including their access level and an explanation. The list shows every user who has access that is greater than the organization-wide default settings.

For forecast sharing, the list shows whether the user can submit a forecast (in forecasting versions where sharing is available). High-volume portal users and Customer Portal super users are excluded from this list.

> 📝 Note: For sharing rules that specify access for associated object records, the given access level applies to that sharing rule only. For example, if an account sharing rule specifies Private as the access level for associated contacts, a user may still have access to associated contacts via other means, such as organization-wide defaults, the "Modify All Data" or "View All Data" permission, or the "Modify All" or "View All" permission for contacts.

1. Click **Sharing** on the desired record.

2. Click **Expand List**.

3. Click **Why?** next to a user's name to see the reason the user has access to the record.

    If there are multiple reasons with different access levels, the user is always granted the most permissive access level.

    The possible reasons are:

Reason	Description
Account Sharing Rule	The user has access via an account sharing rule created by the administrator.

Reason	Description
Account Sharing	The user was granted access via the **Sharing** button on the associated account.
Account Team	The user is a member of the account team.
Account Territory	The account has been assigned to a territory to which the user has access.
Account Territory Rule	The user has access via an account territory sharing rule created by the administrator.
Administrator	The user has the "Modify All Data" or "View All Data" administrative permission, or the "Modify All" or "View All" object permission.
Associated Portal User or Role	The portal user or any role above the portal user's role has access to the account for which the portal user is a contact.
Associated Record Owner or Sharing	The user owns or has sharing access to a contact or contract associated with the account. Click the link to view which associated records the user owns or has been given sharing access to.
Associated Record Sharing	The user is a member of a share group that has access to a contact or contract that's associated with the account owned by high-volume portal users.
Campaign Sharing Rule	The user has access via a campaign sharing rule created by the administrator.
Case Sharing Rule	The user has access via a case sharing rule created by the administrator.
Contact Sharing Rule	The user has access via a contact sharing rule created by the administrator.
Delegated Forecast Manager	A user has access to forecast data that was granted via the **Sharing** button on the forecast (in forecasting versions where sharing is available).
Forecast Manager	A user has access due to being a forecast manager in the forecast hierarchy.
Group Member	The user has access via a group, such as a Managers Group or Manager Subordinates Group.
Lead Sharing Rule	The user has access via a lead sharing rule created by the administrator.
Manager of Territory Member	The user has a subordinate in the role hierarchy who is assigned to the territory with which the account is associated.
Manual Sharing	The user has access that was granted via the **Sharing** button on the record.

Reason	Description
Manual Territory Sharing	The account has been manually assigned to a territory to which the user has access.
Opportunity Sharing Rule	The user has access via an opportunity sharing rule created by the administrator.
Owner	The user owns the record, or the user is a member of the queue that owns the record or above the queue member in the role hierarchy.
Portal Share Group	The user is a member of a share group that has access to records owned by high-volume portal users.
Related Portal User	The portal user is a contact on the case.
Role Above Owner or Shared User (Portal Only)	The user's role is above the role of a portal user who has access to the record via ownership or sharing.
Sales Team	The user is a member of the opportunity sales team.
View All Forecasts Permission	The user has the "View All Forecasts" permission.

SEE ALSO:

Understanding Your Access to UI Elements, Records, and Fields

Granting Access to Records

Record Access Levels

Record Access Levels

When you share records with other users, you can assign them different levels of access to the records.

The available access levels are:

Access Level	Description
Full Access	User can view, edit, delete, and transfer the record. User can also extend sharing access to other users; however, the user cannot grant Full Access to other users.
Read/Write	User can view and edit the record, and add associated records, notes, and attachments to it.
Read Only	User can view the record, and add associated records to it. They cannot edit the record or add notes or attachments.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Sharing for accounts and contacts is available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Sharing for campaigns, cases, custom object records, leads, and opportunities is available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Access Level	Description
Private	User cannot access the record in any way.

📝 **Note:** If you encounter an error when selecting the Full Access option, you no longer have the permission to set full access on records. Contact your administrator to determine if this access is necessary.

SEE ALSO:

Understanding Your Access to UI Elements, Records, and Fields

Viewing Which Users Have Access to Your Records

List Views

List views give you quick access to your important records. You can find preconfigured views, such as a list of recently viewed records, for every standard and custom object. In Salesforce Classic, create customized list views to display records that meet your own criteria. In Lightning Experience, scroll through preconfigured views and list views you created in Salesforce Classic, and use list view charts to see a graphical display of your list view data.

IN THIS SECTION:

Create a List View

Create a list view to see a specific set of records. You can create and save views for opportunities, contacts, leads, and other standard and custom objects. You determine which records display by setting filters. All records that meet your filter criteria appear in your list view.

Edit List View Filters

Refine or update your list views to make sure that you're seeing the most relevant records. To change which records display in a list view, edit the list view filters.

Sort List Views

Lots of objects let you view records in lists, also called "list views." If your list is long, you can sort the records by one of the field columns. For example, you can sort the All Accounts list view by the `Account Name` field column, `Billing State/Province` field column, and others. You can also sort custom list views. Sorting is alphanumeric.

Print a List View in Salesforce Classic

Delete a List View

Delete a list view when you no longer need it to keep your workspace up to date.

Relative Date Values for Filter Criteria

When you create a list view that includes a filter for a range of dates, such as `Create Date` or `Last Update Date`, use one or more of the relative date values provided to specify the range.

Visualize List View Data with Charts in Lightning Experience

See a graphic display of list view data with list view charts. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view, select from available standard and custom list view charts. You can change the data display to another type, if desired.

[Create a List View Chart in Lightning Experience](#)

Create a chart to visualize list view data. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view chart, you can change the data display to another type, if desired. When you create a list view chart for an object, such as Opportunities or Leads, the chart is associated with the object. The chart is available for any list view that you have permission to see for that object, except the Recently Viewed list.

[Edit a List View Chart in Lightning Experience](#)

Refine or update your custom list view charts to make sure that you're seeing the most meaningful data visualizations. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view chart, you can change the data display to another type, if desired.

Create a List View

Create a list view to see a specific set of records. You can create and save views for opportunities, contacts, leads, and other standard and custom objects. You determine which records display by setting filters. All records that meet your filter criteria appear in your list view.

IN THIS SECTION:

[Create a List View in Lightning Experience (Pilot)](#)

Create a view to see an infinitely scrollable list of records that meet your filter criteria.

[Create Custom List Views in Salesforce Classic](#)

Create a list view to see a specific set of contacts, documents, or other object records. For example, you can create a list view of accounts in your state, leads with a specific lead source, or opportunities above a particular amount. You can also create views of contacts, leads, users, or cases to use for mass email recipient lists.

Create a List View in Lightning Experience (Pilot)

Create a view to see an infinitely scrollable list of records that meet your filter criteria.

> ⊘ **Important:** Creation of list views in Lightning Experience is currently available only in Trial orgs. We provide this feature to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Because pilot programs are subject to change, we can't guarantee acceptance. This pilot feature isn't generally available, as referenced in this document or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available features.

> ✎ **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

Actions you can take for list views are available in the List View Controls menu, accessed by clicking

⚙ ▼   next to the list view name.

1. From List View Controls, select **New**. A dialog box appears.

2. Enter a name for your list.

3. Choose who can see this list view: just you, or all users, including Partner and Customer Portal users.

4. Click **Save**. The Filters panel appears.

EDITIONS

Available in: Lightning Experience

Available in: Trial orgs

USER PERMISSIONS

To create list views:
- "Read" on the type of record included in the list AND "Create and Customize List Views"

To create, edit, or delete public list views:
- "Manage Public List Views"

5. Click **Show me**, then select **All *objects*** or **My *objects***.

6. Click **Done**.

7. Add and set filters to view only the records that meet your criteria. You have different options depending on the field you want to filter and the operator you choose.

    a. From the New Filter drop-down menu, select the field to filter.

    b. Click **Done**.

    c. From the Filter by ... drop-down menu, select an operator. For example, choose **equals**, **starts with**, or **excludes**.

    d. In Value, make a selection or enter a value.

    e. Click **Done**.

    f. To set another filter, click **Add Filter**.

    g. To remove a filter, click ✖ near the filter name.

8. Click **Save**. The view appears in the list view drop-down list so you can access it later.

9. Optionally, choose and order the columns in your list view.

    a. From the List View Controls menu, select **Select Fields to Display**.

    b. To add columns, select one or more fields from Available Fields and use the arrow to move them to Visible Fields.

    c. To remove columns, select one or more fields from Visible Fields and use the arrow to move them to Available Fields.

    d. Order columns by selecting one or more fields from Visible Fields and using the arrows to move them up or down.

    e. Click **Save**.

👁 Example: You're planning a trip to San Francisco, and you want to see a list of your accounts to visit while you're there. In Accounts, create a list view that shows My Accounts. Add a filter for `Billing City` **equals** *San Francisco*.

✏ Note: The information you see in list views is only the data to which you have access—either records you own or have read or read/write access to, records that have been shared with you, or records owned by or shared with users in roles below you in the role hierarchy. You can view only those fields that are visible in your page layout and field-level security settings.

SEE ALSO:

    Create Custom List Views in Salesforce Classic

    Edit List View Filters in Lightning Experience (Pilot)

    Filter Operators

    Visualize List View Data with Charts in Lightning Experience

Create Custom List Views in Salesforce Classic

Create a list view to see a specific set of contacts, documents, or other object records. For example, you can create a list view of accounts in your state, leads with a specific lead source, or opportunities above a particular amount. You can also create views of contacts, leads, users, or cases to use for mass email recipient lists.

📝 **Note:** These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.

To create a new view, click **Create New View** at the top of any list page or in the Views section of any tab home page.

📝 **Note:** If you don't see **Create New View**, you don't have the "Create and Customize List Views" permission. Contact your Salesforce administrator to request it.

1. Enter **View Name**

   Enter the name to appear in the View drop-down list.

2. If you have the "Customize Application" permission, enter a unique name to be used by the API and managed packages.

3. **Specify Filter Criteria**

   Filter by Owner

   These options vary depending on the kind of record. In general, select `All...` or `My...` to specify the set of records to search. There may be additional options:

   - Lead and case list views can be restricted by queue.
   - Price book list views can be restricted by price book.
   - Activity list views have several options.
   - If your organization has territory management, account and opportunity list views can be restricted by `My Territories` or `My Territory Teams`. `My Territories` means records associated with territories to which you belong. `My Territory Teams` means records associated with either territories to which you belong or territories below you in the territory hierarchy.
   - If your organization has case teams, case list views can be restricted by `My Case Teams`.
   - If your organization has account teams, account list views can be restricted by `My Account Teams`.
   - If your organization has opportunity teams, opportunity list views can be restricted by `My Opportunity Teams`.

   Filter by Campaign

   This option is available on these list views:

   - Contacts home
   - Leads home
   - Mass email contacts
   - Mass email leads
   - Mass add campaign members wizard
   - Mass update campaign members wizard

   If you are editing a list view that is filtered by campaign, and do not have at least read access to the campaign, you will receive an error when attempting to save the list view.

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To create custom list views:
- "Read" on the type of record included in the list AND "Create and Customize List Views"

To create, edit, or delete public list views:
- "Manage Public List Views"

Filter by Division

If your organization uses divisions to segment data and you have the "Affected by Divisions" permission, select the division that records in the list view must match. This option is disabled if you are not searching all records.

Select --Current-- to show records in your current working division.

Filter by Additional Fields

Optionally, enter filter criteria to specify conditions that the selected items must match, for example, `Lead Source equals Web`. You can also use special date values in your filter criteria.

> **Note:** When you select the `Created Date` field in a list view filter, the value you specify can only be a date and not a time. This restriction does not apply to other filters.

4. **Select Fields to Display**

   The default fields are automatically selected. You can choose up to 15 different fields to display in your view. You can display only the fields that are available in your page layout. When you select a long text area field, up to 255 characters are displayed in the list view.

   a. To add or remove fields, select a field name, and click the **Add** or **Remove** arrow.

   b. Use the arrows to arrange the fields in the proper sequence.

5. **Restrict Visibility**

   If you are an administrator or a user with the "Manage Public List Views" permission, specify whether everyone or just you can see the custom view. This option is not available in Personal Edition. To see a list view, users must also have the appropriate "Read" permission on the type of records within the list view.

   Alternatively, Enterprise, Unlimited, Performance, and Developer Edition users can specify a public group, role, or role including all users below that role to see the custom view. To share the list view, select `Visible to certain groups of users`, choose the type of group or role from the drop-down list, select the group or role from the list below it, and click **Add**.

   > **Note:** List views are visible to your customers in the Salesforce Customer Portal if the `Visible to all users` radio button is selected for views on objects assigned to Customer Portal users' profiles. To create list views that only your Salesforce users can see, select `Visible to certain groups of users`, and then share it with the All Internal Users group or a selected set of internal groups and roles.
   >
   > When implementing a Customer Portal, create custom views that contain only relevant information for Customer Portal users, and then make those views visible to Customer Portal users by sharing them with the All Customer Portal Users group or a selected set of portal groups and roles.

6. Click **Save**. The view appears in the View drop-down list so you can access it later.

   You can rename an existing list view and click **Save As** to save the criteria of the list view without altering the original view.

To navigate back to the last list page you viewed, click **Back to list** at the top of any detail page.

> **Note:** The information you see in list views is only the data to which you have access—either records you own or have read or read/write access to, records that have been shared with you, or records owned by or shared with users in roles below you in the role hierarchy. You can view only those fields that are visible in your page layout and field-level security settings.
>
> In addition, archived activities are not included in activity list views. You can use the Activity History related list to view these activities.

Edit List View Filters

Refine or update your list views to make sure that you're seeing the most relevant records. To change which records display in a list view, edit the list view filters.

IN THIS SECTION:

Edit List View Filters in Lightning Experience (Pilot)

Edit filters on a list view from List View Controls, or click ▼ to access the Filters panel.

Edit List View Filters in Salesforce Classic

To change a list view's filters, edit the list.

SEE ALSO:

Filter Operators

Create a List View in Lightning Experience (Pilot)

Edit List View Filters in Lightning Experience (Pilot)

Edit filters on a list view from List View Controls, or click ▼ to access the Filters panel.

🚫 **Important:** Creation and filtering of list views in Lightning Experience is currently available only in Trial orgs. We provide this feature to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Because pilot programs are subject to change, we can't guarantee acceptance. This pilot feature isn't generally available, as referenced in this document or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available features.

✏️ **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

Actions you can take for list views are available in the List View Controls menu, accessed by clicking

⚙️ ▼ next to the list view name.

You can also access the Filters panel by clicking ▼ .

1. From List View Controls, select **Edit List Filters**. Alternatively, click ▼ . The Filters panel appears.

2. Add, remove, or edit filters to view only the records that meet your criteria. You have different options depending on the field you want to filter and the operator you choose.

    a. From the New Filter drop-down menu, select the field to filter.

    b. Click **Done**.

    c. From the Filter by drop-down menu, select an operator. For example, choose **equals**, **starts with**, or **excludes**.

    d. In Value, make a selection or enter a value.

    e. Click **Done**.

    f.   To set another filter, click **Add Filter**.

    g.   To remove a filter, click ![icon] near the filter name.

3. To apply the edited filters and update the list, click **Save**.

Everyone with access to the list sees the results of your saved changes.

👁 **Example:** You want to display a set of opportunities on a board rather than in a grid, but the list view includes records with different record types. The Opportunities board can only display list views with records of a single record type. To make the view displayable on a board, edit the filters on your list view. On the Filters panel, select **Add Filter**. Choose **Opportunity Record Type** and the **equals** operator, then input the value of the record type you want. Your edited list view can now be displayed on the board.

📝 **Note:** The information you see in list views is only the data to which you have access—either records you own or have read or read/write access to, records that have been shared with you, or records owned by or shared with users in roles below you in the role hierarchy. You can view only those fields that are visible in your page layout and field-level security settings.

Edit List View Filters in Salesforce Classic

To change a list view's filters, edit the list.

📝 **Note:** These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.

1. Click **Edit** next to the list view name. Users without the "Manage Public List Views" permission see **Clone** instead of **Edit** so they can clone a public or standard view.

2. In Specify Filter Criteria, change your `Filter By Owner` selection, if desired. Add or change the `Field`, `Operator`, or `Value` selections in Filter By Additional Fields, if desired.

3. Click **Save** to apply your edited filters to the list view.

All users with access to the list view see the results of your saved changes.

📝 **Note:** The information you see in list views is only the data to which you have access—either records you own or have read or read/write access to, records that have been shared with you, or records owned by or shared with users in roles below you in the role hierarchy. You can view only those fields that are visible in your page layout and field-level security settings.

Sort List Views

Lots of objects let you view records in lists, also called "list views." If your list is long, you can sort the records by one of the field columns. For example, you can sort the All Accounts list view by the `Account Name` field column, `Billing State/Province` field column, and others. You can also sort custom list views. Sorting is alphanumeric.

1. Open the list view.

2. Click the header for the field column you want to sort by.
An arrow appears indicating how the list is sorted: from the column's first record (⬆) (alphanumerically) or its last (⬇).

📝 **Note:** Starting in Spring '13, you can't sort list views for the Users object in Salesforce orgs that have more than two million users.

Print a List View in Salesforce Classic

📝 **Note:** These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.

If printable list views are enabled for your organization, you can print standard list views and custom list views.

1. Go to the list view you want to print. For example: All Accounts on the Accounts tab.

2. Sort the contents of the list view if you want to.

3. Click 🖶.

4. In the new window, select the number of records you want to print—up to 1,000. (To print more than 1,000 records, run a report and then click **Printable View** on the report.)

5. Click **Print This Page**.

Delete a List View

Delete a list view when you no longer need it to keep your workspace up to date.

IN THIS SECTION:

Delete a List View in Lightning Experience (Pilot)
You can delete a list view when you no longer need it.

Delete a List View in Salesforce Classic
You can delete a custom view when you no longer need it.

Delete a List View in Lightning Experience (Pilot)

You can delete a list view when you no longer need it.

🛑 **Important:** Creation and deletion of list views in Lightning Experience is currently available only in Trial orgs. We provide this feature to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Because pilot programs are subject to change, we can't guarantee acceptance. This pilot feature isn't generally available, as referenced in this document or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available features.

📝 **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

1. Select a list view.

2. Click ⚙ ▼ to access List View Controls.

3. Select **Delete**.

Delete a List View in Salesforce Classic

You can delete a custom view when you no longer need it.

> ✎ **Note:** These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.

1. Select a custom list view.

2. Click **Edit**.

3. Click **Delete**.

SEE ALSO:

Create Custom List Views in Salesforce Classic

Relative Date Values for Filter Criteria

When you create a list view that includes a filter for a range of dates, such as `Create Date` or `Last Update Date`, use one or more of the relative date values provided to specify the range.

> 🛇 **Important:** Creation and filtering of list views in Lightning Experience is currently available only in Trial orgs. We provide this feature to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Because pilot programs are subject to change, we can't guarantee acceptance. This pilot feature isn't generally available, as referenced in this document or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available features.

For example, to create a custom view or report of accounts created the previous week, enter `Create Date equals LAST WEEK`. For relative date values with variables, such as "NEXT N DAYS", substitute N with any number greater than zero.

Relative date values are not case-sensitive. You can use "LAST WEEK" or "last week."

You can use multiple range values in a single field, separated by commas.

> ✎ **Note:** For Enterprise, Unlimited, Performance, Professional, and Developer Editions, the week is defined by the Locale drop-down list on your personal information page. For Contact Manager, Group, and Personal Editions, the week is defined by the Locale setting in the company profile . For example, when the locale is US English, a week runs Sunday to Saturday, whereas with UK English, a week spans Monday to Sunday.

> ✎ **Note:** In the table, the relative date values marked with an asterisk (*) aren't available in Lightning Experience.

Relative Date Value	Range
YESTERDAY	Starts at 12:00:00 AM on the day before the current day and continues for 24 hours.
TODAY	Starts at 12:00:00 AM on the current day and continues for 24 hours.
TOMORROW	Starts at 12:00:00 AM. on the day after the current day and continues for 24 hours.
LAST WEEK	Starts at 12:00:00 AM on the first day of the week before the current week and continues for seven days.

Relative Date Value	Range
THIS WEEK	Starts at 12:00:00 AM on the first day of the current week and continues for seven days.
NEXT WEEK*	Starts at 12:00:00 AM on the first day of the week after the current week and continues for seven days.
LAST *n* WEEKS*	Starts at 12:00:00 AM on the first day of the week that started *n* weeks before the current week, and continues up to 11:59 PM on the last day of the week before the current week.
NEXT *n* WEEKS*	Starts at 12:00:00 AM on the first day of the week after the current week and continues for *n* times seven days.
n WEEKS AGO*	Starts at 12:00:00 AM on the first day of the week that started *n* weeks before the start of the current week and continues for seven days.
LAST MONTH	Starts at 12:00:00 AM on the first day of the month before the current month and continues for all the days of that month.
THIS MONTH	Starts at 12:00:00 AM on the first day of the current month and continues for all the days of that month.
NEXT *n* MONTHS*	Starts at 12:00:00 AM on the first day of the month after the current month and continues until the end of the *n*th month.
LAST *n* MONTHS*	Starts at 12:00:00 AM on the first day of the month that started *n* months before the current month and continues up to 11:59 PM on the last day of the month before the current month.
n MONTHS AGO*	Starts at 12:00:00 AM on the first day of the month that started *n* months before the start of the current month and continues for all the days of that month.
NEXT MONTH*	Starts at 12:00:00 AM on the first day of the month after the current month and continues for all the days of that month.
LAST 90 DAYS*	Starts at 12:00:00 AM 90 days before the current day and continues up to the current second. (The range includes today.)
NEXT 90 DAYS*	Starts at 12:00:00 AM on the day after the current day and continues for 90 days. (The range does not include today.)
LAST n DAYS*	Starts at 12:00:00 AM n days before the current day and continues up to the current second. (The range includes today. Using this date value includes records from $n + 1$ days ago up to the current day.)
NEXT n DAYS*	Starts at 12:00:00 AM on the next day and continues for the next n days. (The range does not include today.)
n DAYS AGO*	Starts at 12:00:00 AM on the day *n* days before the current day and continues for 24 hours. (The range does not include today.)
LAST QUARTER	Starts at 12:00:00 AM on the first day of the calendar quarter before the current calendar quarter and continues to the end of that quarter.

Relative Date Value	Range
THIS QUARTER	Starts at 12:00:00 AM on the first day of the current calendar quarter and continues to the end of the quarter.
NEXT QUARTER*	Starts at 12:00:00 AM on the first day of the calendar quarter after the current calendar quarter and continues to the end of that quarter.
LAST n QUARTERS*	Starts at 12:00:00 AM on the first day of the calendar quarter n quarters ago and continues to the end of the calendar quarter before the current quarter. (The range does not include the current quarter.)
NEXT n QUARTERS*	Starts at 12:00:00 AM on the first day of the calendar quarter after the current quarter and continues to the end of the calendar quarter n quarters in the future. (The range does not include the current quarter.)
n QUARTERS AGO*	Starts at 12:00:00 AM on the first day of the calendar quarter n quarters before the current calendar quarter and continues to the end of that quarter.
LAST YEAR	Starts at 12:00:00 AM on January 1 of the year before the current year and continues through the end of December 31 of that year.
THIS YEAR	Starts at 12:00:00 AM on January 1 of the current year and continues through the end of December 31 of the current year.
NEXT YEAR*	Starts at 12:00:00 AM on January 1 of the year after the current year and continues through the end of December 31 of that year.
n YEARS AGO*	Starts at 12:00:00 AM on January 1 of the calendar year n years before the current calendar year and continues through the end of December 31 of that year.
LAST n YEARS*	Starts at 12:00:00 am on January 1, $n+1$ years ago. The range ends on December 31 of the year before the current year.
NEXT n YEARS*	Starts at 12:00:00 AM on January 1 of the year after the current year and continues through the end of December 31 of the nth year.
LAST FISCAL QUARTER*	Starts at 12:00:00 AM on the first day of the fiscal quarter before the current fiscal quarter and continues through the last day of that fiscal quarter. The fiscal quarter is defined on the Fiscal Year page in Setup. ⬚ Note: None of the FISCAL literal date values are supported when creating mobile custom views.
THIS FISCAL QUARTER*	Starts at 12:00:00 AM on the first day of the current fiscal quarter and continues through the end of the last day of the current fiscal quarter. The fiscal quarter is defined on the Fiscal Year page in Setup.
NEXT FISCAL QUARTER*	Starts at 12:00:00 AM on the first day of the fiscal quarter after the current fiscal quarter and continues through the last day of that fiscal quarter. (The range does not include the current quarter.) The fiscal quarter is defined on the Fiscal Year page in Setup.
LAST n FISCAL QUARTERS*	Starts at 12:00:00 AM on the first day of the fiscal quarter n fiscal quarters ago and continues through the end of the last day of the previous fiscal quarter. (The range

Relative Date Value	Range
	does not include the current fiscal quarter.) The fiscal quarter is defined on the Fiscal Year page in Setup.
NEXT *n* FISCAL QUARTERS*	Starts at 12:00:00 AM on the first day of the fiscal quarter after the current fiscal quarter and continues through the end of the last day of the *n*th fiscal quarter. (The range does not include the current fiscal quarter.) The fiscal quarter is defined on the Fiscal Year page in Setup.
n FISCAL QUARTERS AGO*	Starts at 12:00:00 AM on the first day of the fiscal quarter *n* fiscal quarters before the current fiscal quarter and continues through the end of the last day of that fiscal quarter.
LAST FISCAL YEAR*	Starts at 12:00:00 AM on the first day of the fiscal year before the current fiscal year and continues through the end of the last day of that fiscal year. The fiscal quarter is defined on the Fiscal Year page in Setup.
THIS FISCAL YEAR	Starts at 12:00:00 AM on the first day of the current fiscal year and continues through the end of the last day of the fiscal year. The fiscal quarter is defined on the Fiscal Year page in Setup.
NEXT FISCAL YEAR*	Starts at 12:00:00 AM on the first day of the fiscal year after the current fiscal year and continues through the end of the last day of that fiscal year. The fiscal quarter is defined on the Fiscal Year page in Setup.
LAST *n* FISCAL YEARS*	Starts at 12:00:00 AM on the first day of the fiscal year *n* fiscal years ago and continues through the end of the last day of the fiscal year before the current fiscal year. (The range does not include the current fiscal year.) The fiscal quarter is defined on the Fiscal Year page in Setup.
NEXT *n* FISCAL YEARS*	Starts at 12:00:00 AM on the first day of the fiscal year after the current fiscal year and continues through the end of the last day of the *n*th fiscal year. (The range does not include the current fiscal year.) The fiscal quarter is defined on the Fiscal Year page in Setup.
n FISCAL YEARS AGO*	Starts at 12:00:00 AM on the first day of the fiscal year *n* fiscal years ago and continues through the end of the last day of that fiscal year.

Visualize List View Data with Charts in Lightning Experience

See a graphic display of list view data with list view charts. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view, select from available standard and custom list view charts. You can change the data display to another type, if desired.

> 📝 **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

1. On an object home page, select a list view with data you want to visualize.

2. Click 📊 .
   The Charts panel appears.

3. To select a different chart, click 🔻 next to the chart name.

4. To change the graphical display of data, click ⚙️ in the Charts panel and choose a new chart type.
   Your data changes to the new display.

SEE ALSO:

    Create a List View Chart in Lightning Experience

    Edit a List View Chart in Lightning Experience

Create a List View Chart in Lightning Experience

Create a chart to visualize list view data. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view chart, you can change the data display to another type, if desired. When you create a list view chart for an object, such as Opportunities or Leads, the chart is associated with the object. The chart is available for any list view that you have permission to see for that object, except the Recently Viewed list.

> 📝 **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

1. On an object home page, select a list view with data you want to visualize.

2. Click 📊 .

3. In the Charts panel that appears, click ⚙️ .

4. Select **New Chart**.
   A dialog box appears.

5. Enter a chart name.

6. Select a chart type: vertical bar, horizontal bar, or donut.

7. Select the aggregate type, aggregate field, and grouping field.

   The aggregate type specifies how the field data is calculated: by sum, count, or average. The aggregate field specifies the type of data to calculate. The grouping field labels the chart segments.

8. To view your chart, click **Save**.

👁 **Example:** Your sales team wants to compare accounts by number of employees to focus prospecting efforts on large corporations. One of the reps creates a horizontal bar chart by selecting **Sum** as the aggregate type, **Employees** as the aggregate field, and **Account Name** as the grouping field. The chart shows the number of employees at each account by account name.

SEE ALSO:

[Visualize List View Data with Charts in Lightning Experience](#)

[Edit a List View Chart in Lightning Experience](#)

Edit a List View Chart in Lightning Experience

Refine or update your custom list view charts to make sure that you're seeing the most meaningful data visualizations. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view chart, you can change the data display to another type, if desired.

📝 **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

1. On an object home page, click 📊.

2. In the Charts panel that appears, select the name of one of your custom charts.

3. Click ⚙.

4. Select **Edit Chart**.
   A dialog box appears.

5. Make your changes to the chart name, chart type, aggregate type, aggregate field, or grouping field.

   The aggregate type specifies how the field data is calculated: by sum, count, or average. The aggregate field specifies the type of data to calculate. The grouping field labels the chart segments.

6. To view your edited chart, click **Save**.

📝 **Note:** You can't edit standard or preconfigured charts. You can only edit charts that you create. You can't delete list view charts.

SEE ALSO:

[Visualize List View Data with Charts in Lightning Experience](#)

[Create a List View Chart in Lightning Experience](#)

EDITIONS

Available in: Lightning Experience

Available in:
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To edit list view charts:
- "Read" on the type of record included in the list AND "Create and Customize List Views"

View and Share FAQ

How does the sharing model work?

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, the administrator can define the default sharing model for your organization by setting organization-wide defaults. Organization-wide defaults specify the default level of access to records. For most objects, organization-wide defaults can be set to Private, Public Read Only, or Public Read/Write.

In environments where the sharing model for an object has been set to Private or Public Read Only, an administrator can grant users additional access to records by setting up a role hierarchy and defining sharing rules. Role hierarchies and sharing rules can only be used

to grant additional access—they cannot be used to restrict access to records beyond what was originally specified with the sharing model through organization-wide defaults.

After restricting access using organization-wide defaults, users typically get access through one or more of these methods:

- Role hierarchy
- Sharing rules
- Manual sharing
- Implicit access (Accounts and associated child records)
- Teams (Account, Case, and Opportunity)

Which kinds of records can I print list views for?

If printable list views are enabled for your organization, you can print standard and custom list views for these kinds of records.

- Accounts
- Activities
- Campaigns
- Cases
- Contacts
- Contracts
- Custom objects
- Documents
- Leads
- Opportunities
- Permission sets
- Price books
- Profiles
- Products
- Reports
- Solutions

Create Records

Creating records is standard procedure for most Salesforce users. Some objects (such as Account) have special *guidelines and considerations* you need to be aware of, but the *process* of creating a record is similar for all.

IN THIS SECTION:

[Create a Record in SalesforceLightning Experience](#)

Create new Salesforce records for opportunities, leads, tasks, notes, accounts, and contacts. Some objects (such as Account) have special *guidelines and considerations* for you to be aware of, but the *process* of creating a record is similar for all.

EDITIONS

Available in: Lightning Experience

Available in: Salesforce Classic

Available in all editions

Create new Salesforce records for opportunities, leads, tasks, notes, accounts, and contacts. Some objects (such as Account) have special *guidelines and considerations* for you to be aware of, but the *process* of creating a record is similar for all.

SEE ALSO:

Create a Record in SalesforceLightning Experience

Create new Salesforce records for opportunities, leads, tasks, notes, accounts, and contacts. Some objects (such as Account) have special *guidelines and considerations* for you to be aware of, but the *process* of creating a record is similar for all.

> 📝 **Note:** This information is for Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

EDITIONS
Available in: Lightning Experience
Available in all editions

You can create records in different ways in Lightning Experience.

- To create records from any Salesforce page, select the item you want in the navigation menu, then click **New** in the list view.
- To create records from an existing record, click **New** for the item you want. For example, let's say you're viewing a contact record and want to create a note about the contact—click **New** in the Notes section of the contact page.

Create a Record in Salesforce Classic

Create new Salesforce records for opportunities, leads, tasks, notes, accounts, and contacts. Some objects (such as Account) have special *guidelines and considerations* for you to be aware of, but the *process* of creating a record is similar for all.

> 📝 **Note:** This information is for Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience

EDITIONS
Available in: Salesforce Classic
Available in all editions

Depending on how your administrator has set up your Salesforce organization, you can create records in a few different ways.

IN THIS SECTION:

Creating Records from Object Tabs

Before you create a record, make sure you're aware of any guidelines for the kind of record you're creating.

1. Click the tab for the kind of record you want to create. You'll start from that object's Home page. For example, click the Accounts tab if you want to create an account record.

2. Click **New**.

3. Select a record type if you're prompted to.

4. Enter values in the fields. Required fields are identified with a red bar (**|**).

   > 💡 Tip: Most objects have field definitions in the Salesforce help. Just search the help for the object name + "fields". For example, if you're creating or editing an account record and want to know more about your options in the `Industry` drop-down list, look up "Account Fields" in the help.

5. When you finish entering values for your new record, click **Save**, or click **Save & New** to save the current record and create another. If you navigate away from the page before clicking **Save**, you may lose your changes.

SEE ALSO:

Creating Records in Feeds

Creating Records with Quick Create

Create Records

Creating Records in Feeds

Depending on how your administrator has set up Salesforce, you may be able to create records in the feed on the home page, the Chatter tab, and record detail pages. Publishers on different feeds may have different actions available; check with your administrator for information on what you can do in each feed. Before you create a record, make sure you're aware of any guidelines for the kind of record you're creating.

1. In the feed in which you want to create a record, click the quick action that corresponds to the kind of record you want to create.

2. Enter values in the fields. Required fields are identified with a red bar (**|**).
   Most objects have field definitions in the Salesforce help. Just search the help for the object name + "fields". For example, if you're creating or editing an account record and want to know more about your options in the `Industry` drop-down list, look up "Account Fields" in the help.

3. When you finish entering values for your new record, click **Create**.

A feed item for the record you've created appears:

- In the feed in which you created the record.
- As the first item in the feed for the new record itself.
- In your Chatter feed.

- In the Chatter feed of anyone who follows the record from which you created the new record. For example, if you create a contact from the record detail page for the account ABC Industries, anyone who follows ABC Industries will see a feed item for the contact record you created.

SEE ALSO:

Creating Records from Object Tabs

Creating Records with Quick Create

Create Records

Creating Records Using the Create New Drop-Down List

The Create New drop-down list, available in the sidebar, provides options to create new records. To create a new record using the drop-down list:

1. Select the type of record you want to create. The new record page immediately displays in the appropriate tab or the Upload a File dialog box displays if you selected **File**.

2. Fill in the fields.

3. Click **Save** or **Upload to My Files** if you selected **File**.

Creating Records with Quick Create

If your administrator has enabled Quick Create, you can create records from the home pages for leads, accounts, contacts, and opportunities. You can also create accounts from the Account lookup field results list on the Quick Create form on contacts, leads, and opportunities. Validation rules don't apply when you create new records with Quick Create.

1. Click the tab for the kind of record you want to create. To create an account while you create a contact, lead or opportunity, click the 🔍 icon next to the Account field in the Quick Create form you're using.

2. Enter values in the fields. Required fields are identified with a red bar (**|**).
   Most objects have field definitions in the Salesforce help. Just search the help for the object name + "fields". For example, if you're creating or editing an account record and want to know more about your options in the `Industry` drop-down list, look up "Account Fields" in the help.

3. Click **Save**.

SEE ALSO:

Creating Records from Object Tabs

Creating Records in Feeds

Create Records

USER PERMISSIONS

To create records:
- "Create" on the object for the kind of record you're creating

Checking Your Spelling

If Spell Checker is enabled for your organization, you can check your spelling in certain features where you enter text, such as emails, events, tasks, cases, notes, and solutions. Spell Checker does not support all the languages that Salesforce supports. For example, Spell Checker doesn't support Thai, Russian, and double-byte languages, such as Japanese, Korean, or Chinese.

To check your spelling, just look for the **Check Spelling** button wherever you're entering text.

Guidelines for Entering Currency, Dates, Times, and Phone Numbers

Creating and editing records is easier if you understand a few guidelines and tips for the currency, date, time, and phone number fields you'll find in various records.

Currency

In most Salesforce editions, the format and currency type you can use for currency fields, such as `Quota` or `Annual Revenue`, are determined by the `Currency Locale` setting for your company. In Group, Professional, Enterprise, Unlimited, and Performance Edition organizations that use multiple currencies, the format and currency type are determined by the `Currency` field in the record you're creating or editing.

> 💡 Tip: When you enter a monetary amount (or any other type of number), you can use the shortcuts **k**, **m**, or **b** to indicate thousands, millions, or billions. For example, when you enter `50k` it appears as `50,000`. However, these shortcuts do not work for filter criteria.

Dates and Times

Many fields allow you to enter a date or a time in the format specified by your personal `Locale` setting.

When entering dates, you can choose a date from the calendar, or manually enter a date.

Only dates within a certain range are valid. The earliest valid date is 1700-01-01T00:00:00Z GMT, or just after midnight on January 1, 1700. The latest valid date is 4000-12-31T00:00:00Z GMT, or just after midnight on December 31, 4000. These values are offset by your time zone. For example, in the Pacific time zone, the earliest valid date is 1699-12-31T16:00:00, or 4:00 PM on December 31, 1699.

> 💡 Tip:
> - Years appear and are saved as four digits, but you can enter the final two digits and Salesforce will determine the first two. Entries `60` through `99` are assumed to be in the 20th century (for example: `1964`), and entries `00` to `59` are assumed to be in the 21st century (for example: `2012`).
> - If you enter numbers for month and day only (example: `01/15`), Salesforce supplies the *current* year.
> - If your locale and language are English, you can enter words like `Yesterday`, `Today`, and `Tomorrow`, or any day of the week, and Salesforce figures it out. Weekday names (such as `Monday`) are always considered to be in the following week.

Phone Numbers

When you enter phone numbers in various phone fields, Salesforce preserves whatever phone number format you enter. However, if your `Locale` is set to English (United States) or English (Canada), ten-digit phone numbers and eleven-digit numbers that start with "1" are automatically formatted as `(800) 555-1212` when you save the record..

💡 Tip:

- If you do not want the parentheses-space-hyphen formatting (`(800) 555-1212`) for a ten- or eleven-digit number, enter a "+" before the number. For example: `+49 8178 94 07-0`.

- If your ten- and eleven-digit phone numbers have Salesforce's automatic format, you may need to enter the parentheses when specifying filter conditions. For example: `Phone starts with (415)`.

Selecting Picklist Values

In Salesforce, you may encounter a few different types of picklist fields.

- Standard picklists - Click the down arrow to select a single value.

- Multi-select picklists - Double click on any available value in one scrolling box to add that value to the selected scrolling box on the right. You can choose a single value or multiple values. To select values within a range, select the first value and click the last value in the range while holding down the SHIFT key; then, click the arrow to add selections to the chosen box.

- Dependent and controlling picklists work in conjunction with each other. The value chosen in the controlling picklist affects the values available in its dependent picklist. Both controlling and dependent picklists are indicated on edit pages by an ℹ️ icon. Hover your mouse over the icon to display the name of the controlling or dependent picklist.

Edit Records

Editing Records

1. Make sure you're aware of any guidelines for the kind of record you're editing. The Salesforce help will tell you.

2. Find and open the record you want to edit.

3. Click **Edit**.

4. Enter or edit values in the fields.

   💡 Tip: Most objects have field definitions in the Salesforce help. Just search the help for the object name + "fields". For example, if you're creating or editing an account record and want to know more about your options in the `Industry` drop-down list, look up "Account Fields" in the help.

5. When you finish entering or editing values, click **Save**.

SEE ALSO:

Create Records

Guidelines for Entering Currency, Dates, Times, and Phone Numbers

Guidelines for Editing Records with the Inline Editor

Editing Records Directly From Enhanced Lists

Create Notes and Add Them to Records

Attach Files to Records

Checking Your Spelling

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To edit records:
- "Edit" on the object for the kind of record you're editing

Changing a Record's Record Type

Record types determine the picklist values that are available when you create or edit a record. When creating a record, you can choose the record type if you have different record types available and if you have not set your record type preferences to bypass the record type selection page.

📝 **Note:** If your organization uses person accounts, your administrator has configured two different kinds of record types for your organization's accounts: one for business accounts, and another for person accounts. You can change an account's record type only to another record type of the same kind. For example, you cannot change a person account record type to one designated for business accounts.

Editing Record Fields With the Inline Editor

Many Salesforce objects, including custom objects, offer the convenience of inline editing for records.

💡 **Tip:** Not all fields on all objects can be edited inline. To find out whether a field supports inline editing, hover over it and look for a pencil icon (✏️).

1. Within a record you're creating or editing, double-click within the field you want to define or edit. If the field offers Lookup to help you find the value you want, you'll see a magnifying glass icon (🔍).

2. Enter your text in the field or use Lookup to find the value you want. Click the undo icon (↩️) or delete your entry if you need to.

3. Click **Save**.

Guidelines for Editing Records with the Inline Editor

Tips for Saving Inline Edits

- Press **Enter** while your cursor is in a field's edit box to confirm the change for that field.
- Press **Enter** when no fields are in edit mode to save all edits to the record.

Limitations

- Inline editing isn't available in:
  - Accessibility mode
  - Setup pages
  - Dashboards
  - Customer Portal
  - Descriptions for HTML solutions

- The following standard checkboxes on case and lead edit pages are not inline editable:
  - Case Assignment (`Assign using active assignment rules`)
  - Case Email Notification (`Send notification email to contact`)
  - Lead Assignment (`Assign using active assignment rule`)

- The fields in the following standard objects are not inline editable.

    - All fields in Documents and Price Books

    - All fields in Tasks except for `Subject` and `Comment`

    - All fields in Events except for `Subject`, `Description`, and `Location`

    - Full name fields of Person Accounts, Contacts, and Leads. However, their component fields are, for example, `First Name` and `Last Name`.

- You can use inline editing to change the values of fields on records for which you have read-only access, either via field-level security or your organization's sharing model; however, Salesforce doesn't let you save your changes, and displays an insufficient privileges error message when you try to save the record.

Special Cases

- Inline editing is available on detail pages for all editable fields on edit pages, except for some fields on tasks, events, price books, and documents. To edit any of these, navigate to the edit page of a record, change the value of the field desired, and then click **Save**. The following table lists the objects that have inline editing restrictions on some of their fields. You may need special permissions to view some of these fields:

Object	Fields
All Objects	All fields are editable except long text area fields.
Opportunities	All fields are editable, except the following fields are only editable on detail pages (not on list views): - `Amount` - `Stage` - `Forecast Category` - `Quantity`
Leads	All fields are editable, except `Lead Status` is only editable on detail pages (not on list views).
Cases	All fields are editable, except `Case Status` is only editable on detail pages (not on list views).
Contracts	All fields are editable, except `Contract Status` is only editable on detail pages (not on list views).
Events	Only the following fields are editable: - `Description` - `Location` - `Subject` - `Type` - Custom fields
Tasks	Only the following fields are editable: - `Call Type` - `Description` - `Subject`

Object	Fields
	– `Type`
	– Custom fields
Documents	No fields are editable.
Price Books	No fields are editable.

Editing Records Directly From Enhanced Lists

If both inline editing and enhanced lists are enabled for your organization, you can edit records directly in a list. Editable cells display a pencil icon ( ) when you hover over the cell, while non-editable cells display a lock icon ( ).

⚠️ **Warning:** In enhanced list views, when different users make inline edits to the same fields on a record simultaneously, records are updated with the most recent edit, but we don't identify the conflict with a message.

If you have the "Mass Edit from Lists" permission, you can change the value for a common field in up to 200 records at a time for most kinds of records. Products must be edited one at a time.

To edit a single record from a list:

1. From the list, double-click the editable cell.

2. Enter the value you want.

3. Click **OK**.

To mass edit records from a list:

1. Select the checkbox next to each record you want to edit. You can select records on multiple pages.

2. Double-click one of the cells you want to edit. Apply your edit to just one record or to every record you selected.

If you encounter any errors when trying to update records, a console window appears, showing the name of each record in error (if known), as well as an explanation. Click a record in the console window to open its detail page in a new window.

📝 **Note:** To view the error console, you must have pop-up blockers disabled for the Salesforce domain.

Tips for Using Inline Editing with Lists

• Some standard fields don't support inline editing. For example, `Case Status`, `Opportunity Stage`, `Opportunity Amount`, `Opportunity Quantity` and `Lead Status`, and most Task and Event fields can only be edited from a record's edit page. For more information, see Guidelines for Editing Records with the Inline Editor on page 93.

• If your organization uses record types, inline editing with lists is only available when all of the records in the list are of the same record type. Therefore, you must specify a filter of `Record Type equals X`, where `X` is the name of a single record type (or blank for the master record type).

• You can't use inline editing on an enhanced list if your list view filter criteria contain an OR clause.

• For lists of activities, you must specify an additional filter of either `Task equals True` (for tasks) or `Task equals False` (for events) for inline editing to be available.

• If your organization is using Person Accounts:

- – You can't use inline editing to change Person Accounts from a Contact list. You can only inline edit them from an Account list.\
- – You can only use inline editing on contacts associated to business accounts by specifying an additional filter of *Is Person Account EQUALS False* in your list criteria.

Delete Records

Deleting Records

Deleting records is standard procedure for most Salesforce users. For some kinds of objects, deleting one record affects other, related records. For example, if you delete an account or contact, all associated assets are also deleted.

1. Make sure you're aware of the effects (if any) of deleting the kind of record you want to delete. The Salesforce help will tell you.

2. Find and open the record you want to delete.

3. Click **Delete**.

SEE ALSO:

Using the Recycle Bin

Delete Notes and Attachments from Records

Increase Productivity with Notes and Attachments to Records

Notes

Notes is an enhanced version of the Salesforce note-taking tool that lets your users take better notes faster. Use Notes to streamline your workflow, increase productivity, and get the most out of Salesforce.

Notes is built on top of Salesforce Files, so you can do many of the same things with notes that you can do with files, such as report on notes and use Chatter to share notes.

For more information on what you can do with Notes, check out the video: How to Use Notes (1:34).

IN THIS SECTION:

Create Notes and Add Them to Records

Use Notes, our enhanced note-taking tool in Salesforce, to add important information to your records.

Create a Report on Your Notes

View and analyze details about all your notes using reports. You can only report on notes taken with Notes, our enhanced note-taking tool.

Guidelines for Using Notes in Salesforce1

Learn some tips, tricks, and best practices for using Notes in Salesforce1.

What's the Difference Between Notes and the Old Note-Taking Tool?

Notes is an enhanced version of the original Salesforce note-taking tool. With Notes, you can get a number of features that help you take better notes faster and increase productivity.

Create Notes and Add Them to Records

Use Notes, our enhanced note-taking tool in Salesforce, to add important information to your records.

Note: If you're still using the old note-taking tool, talk to your administrator about switching to the enhanced version of Notes.

IN THIS SECTION:

Create Notes and Add Them to Records in Salesforce Classic

Add important information to your records using Notes, our enhanced note-taking tool in Salesforce, so you can be more organized and increase productivity.

Create Notes and Add Them to Records in Salesforce Lightning Experience

Notes lets you add important information to your records so you can stay organized.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in:
- Contact Manager
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Create Notes and Add Them to Records in Salesforce Classic

Add important information to your records using Notes, our enhanced note-taking tool in Salesforce, so you can be more organized and increase productivity.

Note: These steps work in Salesforce Classic. If you see a row of tabs across the top of your screen, you're in Salesforce Classic. If you see a navigation bar on the left, you're in Lightning Experience.

1. From a record's Notes related list, click **New Note**. Or, to create a private, stand-only note that's not related to a record, go to the Files tab and click any of the Notes filters to show the New Note option.

2. Enter a title and body text.

3. Save the note.
   Notes taken with the enhanced version of Notes appear in the record's Notes related list, while notes taken with the old note-taking tool appear in the record's Notes & Attachments related list.

SEE ALSO:

Guidelines for Using Notes in Salesforce1

What's the Difference Between Notes and the Old Note-Taking Tool?

EDITIONS

Available in: Salesforce Classic

Available in:
- Contact Manager
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Create Notes and Add Them to Records in Salesforce Lightning Experience

Notes lets you add important information to your records so you can stay organized.

📝 **Note:** These steps work in Lightning Experience. If you see a navigation bar on the left side of your screen, you're in Lightning Experience. If you see a row of tabs across the top of the screen, you're in Salesforce Classic.

1. From the record's Notes related list, click **New** . Or, to create a private, stand-only note that's not related to a record, click the Notes icon from the navigation menu.

2. Enter a title and body text.

3. Relate the note to other records, if needed.
   Notes taken with the enhanced version of Notes appear in the record's Notes related list, while notes taken with the old note-taking tool appear in the record's Notes & Attachments related list.

SEE ALSO:

Guidelines for Using Notes in Salesforce1

What's the Difference Between Notes and the Old Note-Taking Tool?

Create a Report on Your Notes

View and analyze details about all your notes using reports. You can only report on notes taken with Notes, our enhanced note-taking tool.

1. Make sure you're familiar with standard reports and how to customize them.

2. Create a new report with the following criteria.

Report type	File and Content Report
Fields	File Name Published Date Created By Last Revised Date Last Revised By File Type
Filters	File Type equals *SNOTE*

3. Be sure to save your report so you can run it again later.

4. If you'd like to share the report with others, create a report folder and save the report to it. Then, use the sharing settings for the folder to add individuals or groups of users.

SEE ALSO:

Notes

Guidelines for Using Notes in Salesforce1

Learn some tips, tricks, and best practices for using Notes in Salesforce1.

Watch a video: (▶) How to Use Notes (1:34)

Your administrator will need to set up Notes for your organization. Then, you can start using Notes in Salesforce1 . Here are some guidelines to help you out.

- Create notes by tapping 🔲 in the action bar.
- Add bulleted and numbered lists to notes using the icons in the Notes toolbar.
- Relate notes to multiple records by tapping **Relate Records**. To change the related records, tap the names of the related records (3).
- Create a task by swiping a line in a note. Alternatively, tap on a line or highlight some text, and then tap ✔ in the toolbar.
- Work with related tasks directly from a note.
- View and search all their notes by selecting **Notes** in the Salesforce1 navigation menu.
- If you or your administrator has added the Notes related list to object page layouts, you can:
  - Quickly access related notes directly from records instead of having to switch away to the navigation menu to open the Notes item.
  - Create notes from the related list.

What's the Difference Between Notes and the Old Note-Taking Tool?

Notes is an enhanced version of the original Salesforce note-taking tool. With Notes, you can get a number of features that help you take better notes faster and increase productivity.

Notes vs. the Old Note-Taking Tool

Feature	Notes	Old Note-Taking Tool
Add notes to records	✔	✔
Use the Notes related list to manage notes	✔	
Use the Notes & Attachments related list to manage notes		✔
Notes save automatically	✔ (Lightning Experience only)	
Check spelling		✔
Add private notes to records		✔
Create private, standalone notes (not related to records)	✔	
Relate notes to multiple records	✔ (Lightning Experience and Salesforce1 only)	

Feature	Notes	Old Note-Taking Tool
Use rich text formatting, including bulleted and numbered lists	✅	
Search Salesforce for just notes	✅	
Create tasks from notes	✅ (Salesforce1 only)	
Create a report on your notes	✅	

SEE ALSO:

Guidelines for Using Notes in Salesforce1

Create Notes and Add Them to Records

Notes

Attach Files to Records

You can attach files—such as Microsoft® Office documents, Adobe® PDFs, and images and videos—to most kinds of Salesforce records. The size limit for an attached file is 25 MB when attached directly to the related list, including a file attached to a solution.The size limit for multiple files attached to the same email is 25 MB, with a maximum size of 5 MB per file.

1. Open the record

2. Click **Attach File**.

3. Click **Browse** and find the file you want to attach

4. Click **Attach File** to upload the file.

5. Click **Done** when the upload is finished

📝 Note:

- When a file is attached to a record's Chatter feed it's added to the Notes and Attachments related list as a feed attachment. The file size limit for Chatter feed attachments is 2 GB.

- If the `Don't allow HTML uploads as attachments or document records` security setting is enabled for your organization, you cannot upload files with the following file extensions: `.htm`, `.html`, `.htt`, `.htx`, `.mhtm`, `.mhtml`, `.shtm`, `.shtml`, `.acgi`, `.svg`.

EDITIONS

Available in: Salesforce Classic

Available in:
- Contact Manager
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To attach files to records:
- "Edit" on the object

Considerations for Managing Files and Notes Attached to Records

When working with attachments, Google docs, or notes created with the old note-taking tool, there are a number of things to keep in mind.

- If Chatter is enabled for your organization, files posted to a feed on a record are added to the record's Notes & Attachments related list as feed attachments. You can preview (if available), download, and delete feed attachments from the Notes & Attachments related list, but you can't edit them.

- You can't edit a note or attachment unless you also have access to edit the record associated with it.

- To delete a note or attachment, you must be the owner of the note or attachment or an administrator with the "Modify all Data" permission. Note ownership is determined by the owner field. Attachment ownership is determined by the created by field.

- Record owners can delete attachments on records even if they did not add the attachment.

- Portal users can download attachments, but can't preview, edit, or delete them.

- Notes and attachments marked as private via the `Private` checkbox are accessible only to the person who attached them and administrators. For administrators to view private notes and attachments, they need the "View All Data" permission; to edit or delete them, they need the "Modify All Data" permission.

- If the Add Google Docs to Salesforce service is enabled in your organization, the Notes & Attachments related list is entitled Google Docs, Notes & Attachments. The Attachments related list is entitled Google Docs & Attachments.

- To access a Google doc from a record detail page, the doc must be shared with your Google Apps account.

- The Notes and Attachments related list includes files from Salesforce CRM Content when they are posted to a Chatter feed on a record. However, the Notes and Attachments related list does not include Salesforce CRM Content files that only exist in Salesforce CRM Content. If your organization has Salesforce CRM Content enabled, you can add the Related Content related list to the detail pages for accounts, contacts, leads, opportunities, cases, products, or custom objects.

- If you publish notes to external contacts via Salesforce to Salesforce, all public notes are automatically shared with a connection when you share the parent object. Attachments are automatically shared if the `Share With Connections` checkbox on the attachment is selected. To stop sharing a note or attachment, select `Private`.

- Not all files can be previewed, such as encrypted files, password-protected files, copy-protected PDFs, unknown file types, and any file larger than 25 MB. For files that can't be previewed, the **Preview** option isn't available on feeds or list views, and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews. If a file can be previewed, but a preview doesn't exist, contact your Salesforce administrator who may be able to regenerate the preview.

- All notes and attachments added to contacts and opportunities roll up under the associated account as well.

SEE ALSO:

Notes

Create Notes and Add Them to Records

Guidelines for Using Notes in Salesforce1

Note and Attachment Fields

Fields for Notes

In Summer '15, we introduced Notes, an enhanced version of the Salesforce note-taking tool. This table lists the fields available when you create a note using Notes. There's also a toolbar with icons for adding bulleted and numbered lists to notes.

📝 **Note:** In Salesforce1 and Lightning Experience, there are additional fields for relating multiple records to the note.

Field	Description
Body	Text of the note. Can hold up to 50 MB of data.
Title	Subject of note. Maximum of 200 characters.

Fields for the Old Note-Taking Tool

Field	Description
Body	Text of the note. Can hold up to 32 KB of data.
Private	Checkbox to indicate that note is only accessible to the owner and administrators. For administrators to view private notes, they need the "View All Data" permission; to edit them, they need the "Modify All Data" permission.
Title	Short description of note. Maximum of 80 characters.

Fields for Attachments

Attachment Fields	
Field	**Description**
Description	Description of the uploaded file.
File Name	Name of the uploaded file.
Private	Checkbox to indicate that the attachment is only accessible to the owner and administrators. For administrators to view private attachments, they need the "View All Data" permission; to edit them, they need the "Modify All Data" permission.
Share With Connections	Checkbox to indicate that the attachment is shared with connections when the parent record is shared. This checkbox is only available if Salesforce to Salesforce is enabled, the parent record is shared, and the attachment is public.
Size	Size of the uploaded file.

Delete Notes and Attachments from Records

To delete a note or attachment, click **Del** next to the note or attachment in the Notes and Attachments related list or Attachments related list of a record. Deleted notes and attachments can be restored from the Recycle Bin.

To delete a file that was attached from a Chatter feed, click **Del** next to the feed attachment. This removes the file from all Chatter feeds where it's been shared and deletes the file from the Notes and Attachments related list. Restore the file by clicking on the Recycle Bin, selecting the file, and clicking **Undelete**. If the file was attached from your computer, a Chatter feed, group, or a Salesforce CRM Content library, deleting it from the Notes and Attachments related list also removes it from the post, but doesn't delete it from its original location.

SEE ALSO:
> Create Notes and Add Them to Records
> Considerations for Managing Files and Notes Attached to Records

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in:
- Contact Manager
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To delete a note or attachment:
- Owner of the parent record

  OR

  "Edit" or "Delete" on the parent record type

  OR

  "Modify All Data"

Records FAQ

Why is the record I'm trying to save being flagged as a duplicate? What can I do?

Your organization uses duplicate rules, which prevent users from creating duplicate records. Read the message to decide how to proceed.

Here's what you'll see if the record you're trying to save is flagged as a possible duplicate.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

1. A system-generated message tells you how many possible duplicates were found. The number includes only the records you have access to. If you don't have access to any of the records that are identified as possible duplicates, then this message won't include a number but will include a list of record owners so you can request access to the existing duplicates.

2. A custom alert written by whoever created the duplicate rule. Ideally, the alert should explain why you can't save the record and what you should do.

3. If the duplicate rule allows you to save a record despite it being a possible duplicate, the **Save (Ignore Alert)** button is present. If the duplicate rule blocks you from saving a record that is a possible duplicate, the **Save** button is present but the record cannot be saved successfully until you make the necessary changes to the record so it's no longer flagged as a possible duplicate.

4. The list of possible duplicates includes only records you have access to. The fields shown in the list include only fields you have access to (up to the first 7 fields that were compared and determined to match). A maximum of 5 records are displayed in this list, but if more than 5 duplicates were found, click **Show All >>** to see full list of records, up to 100. Records are listed in the order they were last modified. Go directly to one of the records in the list by clicking on its link.

5. The highlighted fields are the fields that were compared and determined to match.

What formats should I use for dates, times, and names in Salesforce?

The format used for dates, times, and names of people in Salesforce is determined by your `Locale` setting.

To find out what date/time format your `Locale` setting uses:

1. From your personal settings, enter `Advanced User Details` in the `Quick Find` box, then select **Advanced User Details**. No results? Enter `Personal Information` in the `Quick Find` box, then select **Personal Information**.

2. View the date/time format used in the read-only `Created By` field. This is the format you should use for entering dates and times in Salesforce fields.

SEE ALSO:

    Find Your Personal Settings

How do I allow only certain users to share data?

If your Professional, Enterprise, Unlimited, Performance, or Developer Edition organization has a Private or Public Read Only sharing model, your administrator can still allow certain users to share information. Your administrator can create public groups and then set up sharing rules to specify that users in certain roles or groups will always share their data with users in another role or public group. Individual users can also create personal groups to give access to their own accounts, contacts, and opportunities.

Can an individual user control the sharing of records they own?

Yes. In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, all account owners are empowered to further extend the sharing on an account-by-account basis. For example, if the organization has a Private model, the Acme account owner can share this account and its related data to selected groups, or to individual users.

In Enterprise, Unlimited, Performance, and Developer Editions, opportunity owners can also extend the sharing for individual opportunities separately from account sharing.

You can use account, lead, case, and opportunity sharing to increase access to your data; you cannot restrict access beyond your organization's default access levels.

This type of sharing is called manual sharing, and is done by the **Sharing** button on the record detail page.

Can I transfer records to other users?

In most editions, you can transfer ownership of records using one of these methods. When you change a record's owner, Salesforce also transfers ownership of certain related records.

Transferring ownership of a single record you own
    Click **Change Owner** on the record's detail page. For more information, see Changing Ownership and Transfer of Associated Items.

Transferring ownership of multiple cases, leads, or custom object records that you own
    Click the object's tab and view a list view. Select the records to be transferred, and click **Change Owner**.

Transferring ownership of multiple records owned by other users
    Use the Mass Transfer feature. For more information about using Mass Transfer and which related records are transferred, see Mass Transferring Records.

Transferring record ownership using workflow rules
    When a record owner is changed by a workflow rule, Salesforce does not change the ownership of any related records.

How do I print Salesforce records?

To print the details of a Salesforce record:

1. Click the **Printable View** link located in the upper right corner of most detail pages. A new browser window opens with the record displayed in a simple, print-ready format.

2. Optionally, collapse and expand individual sections in the printable view by clicking the triangles next to the section headings.

3. Optionally, click **Expand All** or **Collapse All** to show or hide all of the collapsible sections on the page. Related lists, such as the list of opportunities related to an account, are not collapsible.

4. Click **Print This Page** or use your browser's print function to send the page to a printer.

> Note: On the Console tab, you can click the print icon (🖶) to open a record's printable view.

Monitor and Analyze Your Data

Run a Report

To run a report, find it on the Reports tab and click the report name. Most reports run automatically when you click the name. If you're already viewing a report, click **Run Report** to run it immediately or schedule a future run. In Lightning Experience, the **Run Report** button only appears after you save a report.

If you don't see any results, check the report for one of these conditions:

- The report didn't return any data. Check your filter criteria to make sure some data is returned.
- Due to field-level security, you don't have access to one of the groupings you selected.
- Your custom summary formula's context didn't match the chart settings. For example, if the formula is calculated for Industry, but the chart doesn't include Industry, no results are returned.
- Your values are out of the range of acceptable values. The maximum value allowed is 999999999999999. The minimum value allowed is -99999999999999.

If your report returns more than 2,000 records, only the first 2,000 records are displayed. To see a complete view of your report results, click **Export Details**.

If your report takes longer than 10 minutes to complete, Salesforce cancels the report. Try the following techniques to reduce the amount of data in your report:

- Filter for your own records, rather than all records.
- Limit the scope of the data to a specific date range.
- Exclude unnecessary columns from your report.
- Hide the report details.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** editions except **Database.com**

USER PERMISSIONS

To run reports:
- "Run Reports"

To schedule reports:
- "Schedule Reports"

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

Joined Reports

Add Filter Logic

Filter logic lets you specify conditions for your filters using logical operators.

To change the default AND relationship between each filter:

1. Click **Add** > **Filter Logic**.

2. Enter each filter line number, separated by an operator:

Operator	Definition
AND	Finds records that match both values.
OR	Finds records that match either value.
NOT	Finds records that exclude values.

SEE ALSO:

[Filter Operators](#)

[Filter on Blank Values](#)

[Filtering on Special Picklist Values](#)

Filter Operators

The operator in a filter is like the verb in a sentence. When you choose filter criteria, use an operator to specify the action you want the filter to take.

You can use the following operators when entering filter criteria on list views, reports, dashboards, and some custom fields:

Operator	Uses
equals	Use for an exact match. For example, "Created equals today."
less than	Use for results that are less than the value you enter. For example, "Quota less than 20k" returns records where the quota field ranges from 0 to 19,999.99.
greater than	Use when you want results that exceed the value you enter; for example, "Quota greater than 20k" returns records where the quota amount begins at 20,000.01.
less or equal	Use for results that match or are less than the value you enter.
greater or equal	Use for results that match or exceed the value you enter.
not equal to	Shows results that don't have the value you enter. This operator is especially useful for eliminating empty fields. For example, "Email not equal to <blank>."

Operator	Uses
contains	Use for fields that include your search string, but sometimes also include other information. For example, "Account contains california" would find California Travel, California Pro Shop, and Surf California. Keep in mind that if you enter a short search string, it can match a longer word. For example, "Account contains pro" would find California Pro Shop and Promotions Corporation. This operator is not case-sensitive.
does not contain	Eliminates records that don't contain the value you enter. For example, "Mailing Address Line 2 does not contain P. O. Box."
	Note: When specifying filter criteria on roll-up summary fields, `does not contain` uses "or" logic on comma-separated values. On list views, reports, and dashboards, `does not contain` uses "and" logic.
	This operator is not case-sensitive.
starts with	Use when you know what your value starts with, but not the exact text. This operator is a narrower search term than "contains." For example, if you enter "Account starts with california," you find California Travel and California Pro Shop, but not Surf California.
includes	Available when you choose a multi-select picklist as the selected field. Use this operator to find records that include one or more of the values you enter.
	For example, if you enter "Interests includes hockey, football, baseball," you find records that have only hockey selected, and records that have two or three of the values entered. Results do not include partial matches of values.
excludes	Available when you choose a multi-select picklist as the selected field. Use this operator to find records that do not contain any values that match the ones entered.
	For example, if you enter "Interests exclude wine, golf," your report lists records that contain any other values from that picklist, including values that are blank. Results do not include partial matches of values.
between	Available for dashboard filters only. Use to filter on ranges of values. For each range, the filter returns results that are greater than or equal to the minimum value and less than the maximum value.
	For example, if you enter "Number of Employees from 100 through 500," your results include accounts with 100 employees up to those with 499 employees. Accounts with 500 employees aren't included in the results.
within	Available when you create list views based on a Geolocation custom field. Shows results that are within the specified radius from a fixed latitude and longitude. For example, if you enter "Warehouse location within 50 miles 37.775° −122.418°,", your list view includes all warehouses within a 50–mile radius of San Francisco, California.

Filter on Blank Values

Tips on filtering using blank values.

- When you use the "less than," "greater than," "less or equal," or "greater or equal" operators on fields that have numeric values, records with blank or "null" values are returned as if their value is zero (0). For example, if you create a workflow rule or a lead assignment rule for accounts with the criteria `Annual Revenue less than 100000`, account records match if their `Annual Revenue` is blank.

However, records with blank field values are not considered matches in report filters, custom list views, and account assignment rules (which assign accounts to territories).

- To limit results to records that are blank or contain "null" values for a particular field, choose the field and the "equals" or "not equal to" operators, leaving the third field blank. For example, *Amount equals* returns records with blank amount fields. You can search for blank values or other specified values at the same time. For example, *Amount equals 1,,2* returns records where the *Amount* is blank or contains the value "1" or "2".

Filtering on Special Picklist Values

When creating filter criteria, you can use special picklist values for your search criteria. These are special picklists with values of either *True* or *False*.

For example, to show all opportunities you have won, enter *Won equals True* as your search criteria. To show all closed/lost opportunities, enter *Closed equals True* and *Won equals False*.

📝 **Note:** If you are creating filter criteria for a report or list view, the lookup icon automatically displays when you choose to filter on one of the special picklists. Click the lookup icon to choose the value *True* or *False*. Alternatively, you can manually enter *True or False* in the filter criteria.

These are the available fields and their values:

Special Picklist Field	Value	Description
Accounts and contacts: Is Person Account	True	The account is a person account. Note that your administrator may have customized the name of this field. This field displays as the person account icon (👤).
	False	The account is a business account.
Accounts, leads, and opportunities: Partner Account	True	The account is a partner account, or the lead or opportunity owner is a partner user.
	False	The account is not a partner account or the lead or opportunity owner is not a partner user.
Activities: All-day	True	Applies only to events, not tasks. The event is marked as an all day event.
	False	The event has a specific time.
Activities: Closed	True	Applies only to tasks, not events. The task has been closed, that is, the task Status field has a "Closed" value.
	False	Task is still open.
Activities: Event Invitation (Only for reports)	True	Applies only to events, not tasks. The event is the meeting invite sent to another user for a multi-person event.
	False	The event is the original multi-person event assigned to the event host.
	False	Activity does not have a green sheet.

Special Picklist Field	Value	Description
Activities: `Task`	True	Activity is a task, not an event.
	False	Activity is an event.
Campaigns: `Active`	True	Campaign is active and can be chosen from various campaign picklists, for example, in the campaign import wizards.
	False	Campaign is inactive.
Cases: `Closed`	True	The case is closed, that is, the case `Status` field has a "Closed" value.
	False	Case is still open.
Cases: `Escalated`	True	Case has been automatically escalated via your organization's escalation rule.
	False	Case has not been escalated.
Cases: `New Self-Service Comment`	True	Case has a new comment added by a Self-Service user.
	False	Case does not have a new Self-Service comment.
Cases: `Open` (Only for reports)	True	The case is open, that is, the case `Status` has a value that is not equivalent to "Closed."
	False	Case has been closed.
Cases: `Self-Service Commented`	True	Case has a comment added by a Self-Service user.
	False	Case does not have a Self-Service comment.
Contacts: `Email Opt Out`	True	The contact cannot be included in a mass email recipient list.
	False	The contact may receive mass email.
Contacts: `Self-Service Active` (Only for reports)	True	The contact is enabled to log in to your Self-Service portal.
	False	The contact is not enabled for Self-Service.
Leads: `Converted` (Only for reports)	True	The lead has been converted.
	False	The lead has not been converted.
Leads: `Email Opt Out`	True	The lead cannot be included in a mass email recipient list.
	False	The lead may receive mass email.
Leads: `Unread`	True	The lead has not yet been viewed or edited by the owner since it was assigned to that user.
	False	The lead has been viewed or edited at least once by the owner since it was assigned.
Opportunities: `Closed`	True	The opportunity is closed, that is, the `Stage` field has a value of the type Closed/Won or Closed/Lost.
	False	The opportunity is still open.

Special Picklist Field	Value	Description
Opportunities: `Primary` (Only for Partner Opportunities report)	True	The partner for the opportunity has been marked as the primary partner.
	False	The partner for the opportunity has not been marked as the primary partner.
Opportunities: `Private`	True	The opportunity owner has checked the `Private` box on the opportunity edit page.
	False	The `Private` box on the opportunity is not checked.
Opportunities: `Won`	True	The opportunity is closed and won, that is, the `Stage` field has a value of the type Closed/Won.
	False	The opportunity has not been won. The `Stage` field may have a value of the type Open or Closed/Lost.
Products: `Active`	True	Product is active and can be added to opportunities in Enterprise, Unlimited, and Performance Edition organizations.
	False	Product is inactive and cannot be added to opportunities.
Product: `Has Quantity Schedule`	True	Product has a default quantity schedule.
	False	Product does not have a default quantity schedule.
Product: `Has Revenue Schedule`	True	Product has a default revenue schedule.
	False	Product does not have a default revenue schedule.
Solutions: `Visible in Self-Service Portal`	True	The solution has been marked `Visible in Self-Service Portal` and is visible to Self-Service portal users.
	False	Solution is not marked `Visible in Self-Service Portal` and is not visible to Self-Service portal users.
Solutions: `Reviewed`	True	The solution has been reviewed, that is, the solution `Status` field has a "Reviewed" value.
	False	Solution is not reviewed.
Solutions `Out of Date`	True	The translated solution has not been updated to match the master solution with which it is associated.
	False	The translated solution has been updated to match the master solution with which it is associated.
Users: `Active`	True	User is active and can log in.
	False	User is inactive and cannot log in.
Users: `Offline User`	True	User has access to use Connect Offline.
	False	User is not enabled for Connect Offline use.
Users: `Marketing User`	True	User can manage campaigns.

Special Picklist Field	Value	Description
	False	User is not enabled to manage campaigns.
User: Is Partner	True	User is a partner user.
	False	User is not a partner user.

> ✏️ **Note:** The special picklists you can view are only those that are visible in your page layout and field-level security settings.

Sort Report Results

Sort a report by the data in a particular column by clicking that column's heading. Clicking a column header sorts data according to that column's ascending order: text is sorted from A to Z, numerical data is sorted from lowest to highest, and time/date data is sorted from earliest to latest.

- To reverse the sort order, click the column heading a second time.
- If the floating report header is enabled for your organization, sort behavior is slightly different.

  When users sort data by clicking a floating report heading, the report refreshes and redirects users to the beginning of report results.

- In a report with multiple grouping levels, you can sort by the summary value that defines each grouping.
  For example, take an Opportunities report that's grouped by type of business. Each `Type` grouping is in turn grouped by `Stage`, and each `Stage` grouping is grouped by `Lead Source`. Now you can sort the `Type` groupings by amount, the `Stage` grouping by stage, and the `Lead Source` grouping by record count.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** editions except **Database.com**

USER PERMISSIONS

To sort report results:
- "Run Reports"
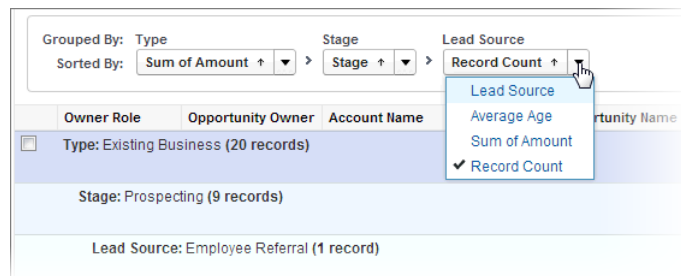
Visualizing Data with Dashboards

A *dashboard* shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. The components provide a snapshot of key metrics and performance indicators for your organization. Each dashboard can have up to 20 components.

Clicking the Dashboards tab displays the dashboard you viewed most recently. The top of the page shows the time the dashboard was refreshed last and the user whose permissions determine what data is visible on the dashboard.

Each component in a dashboard shows data from an underlying report. If you have access to the folder for the underlying source report, you can see the related dashboard component. Click a dashboard component or its elements to drill down to the source report, filtered report, record detail page, or other URL. If you drill down on a filtered component, the dashboard filters are applied to the source report.

Click **Go to Dashboard List** to view your dashboards. Find a dashboard using dashboard finder. Type a name in the `View Dashboard` field and choose a dashboard from the list of results. You can only see dashboards in folders you can access.

Follow a dashboard to get updates about the dashboard posted to your Chatter feed.

Find and Organize Information

Search

When you search for your information in Salesforce, the search engine efficiently finds and displays relevant results you have access to through a complex search process. This is whether from the full Salesforce site, a Salesforce1 mobile app, or a custom search implementation built on the Salesforce platform.

Salesforce provides a search engine that effectively finds information such as accounts, contacts, files, articles, and products in your organization. Each time you create a new record, the search engine breaks up the searchable information into pieces it easily recognizes and stores them in an

index. When you enter your search, it efficiently finds relevant results for you by breaking apart your search terms and finding matches for them from that index. The search engine returns results you have permission to view.

Check out the video:

[▶] How Does Search Work?

Here's an overview of the search process.
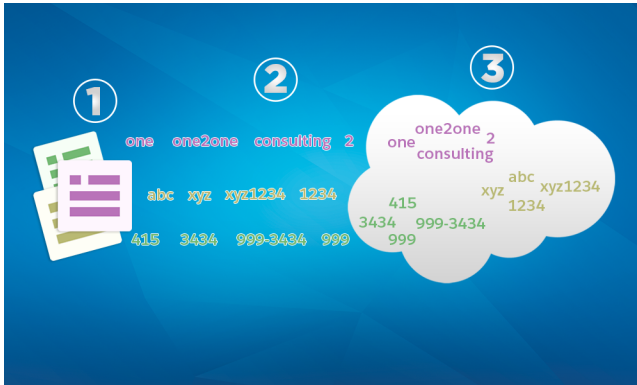
When you create or update a record (1), the search engine breaks up the record's searchable text into smaller terms (2). Then, it stores those smaller terms in the search index (3).

> [✎] Note: After a searchable object's record is created or updated, it could take about 15 minutes or more for the updated text to become searchable. An object's records are only searchable after they're stored in the search index.

When you enter a search term in the search field (1), the search engine breaks up your search term into smaller terms (2). It matches those smaller terms to the record information stored in the index (3), ranks the associated records by relevancy (4), and returns the results you have access to (5).

For more information on what you can do with Search, check out these videos.

 Search in Salesforce Classic

 Search in Salesforce Lightning Experience

IN THIS SECTION:

How Does Search Break Up Information?

Each time you create a new record, the search engine breaks up the searchable information into pieces it easily recognizes and stores them in an index.

How Is Search Different Between Lightning Experience, Salesforce Classic, and Salesforce1?

Global search in the full Salesforce site (whether Lightning Experience or Salesforce Classic) and Salesforce1 mobile app uses the same search index, so you're always searching the same data. You see the same set of recently accessed records in instant results, and search results are influenced by the same search scope (the list of objects you use the most). But remember that some standard objects aren't available in Salesforce1 and Lightning Experience, so you won't always see the exact same search results. And the global search interface is different between all of these experiences, so there are visual and navigational differences to consider.

How Do I Search in Lookup Fields?

Use lookup dialog search to associate two records together.

Which Fields Are Searchable?

Salesforce searches a unique set of fields for each object.

How Does Search Break Up Information?

Each time you create a new record, the search engine breaks up the searchable information into pieces it easily recognizes and stores them in an index.

The search engine breaks down searchable text into smaller pieces, called *tokens*, and stores them in the search index. When you search, the search engine breaks down your search terms into tokens so it can find matching tokens in the index. It returns the records associated with the matching tokens.

The search engine splits record information that contains letters, numbers, spaces, and punctuation into separate tokens.

Here are some examples of the tokens created from the given record information. You could find the record with a search using any of the indexed tokens listed.

EDITIONS
Available in: both Salesforce Classic and Lightning Experience
Available in all editions

Record Information	Indexed Tokens
Acme, Inc.	acme
	inc
Web2Lead	web2lead
	web
	2
	lead
Exhibit-XYZ1234	exhibit-xyz1234

Record Information	Indexed Tokens
	exhibitxyz1234
	exhibit
	xyz1234
	xyz
	1234
(415) 999-3434	415
	999-3434
	9993434
	999
	3434
john.smith@domain.com	john.smith@domain.com
	@domain.com
	john.smith
	john
	smith
	johnsmith
	domain.com
	domain
	com
	domaincom

IN THIS SECTION:

[How Search Handles Terms in Chinese, Japanese, Korean, and Thai](#)
Search finds relevant results for searches in East Asian languages such as Chinese, Japanese, Korean, and Thai by breaking up information to store in the search index.

SEE ALSO:

[Search](#)

How Search Handles Terms in Chinese, Japanese, Korean, and Thai

Search finds relevant results for searches in East Asian languages such as Chinese, Japanese, Korean, and Thai by breaking up information to store in the search index.

The search engine returns accurate search results from searches in East Asian languages that don't include spaces between words, such as Chinese, Japanese, Korean, and Thai (CJKT), using morphological tokenization.

Consider the problem of indexing the term *Tokyo Prefecture* and a subsequent search for Kyoto in Japanese.

Indexed Term	Search Term
東京都	京都
Tokyo Prefecture	Kyoto

Morphological tokenization segments the term 東京都 (Tokyo Prefecture) into two tokens.

Indexed Term	Search Term
東京	都
Tokyo	Prefecture

This form of tokenization ensures that a search for 京都 (Kyoto) returns only results that include 京都 (Kyoto) and not 東京都 (Tokyo Prefecture).

In Chinese, Japanese, Korean, and Thai (CJKT) you can find a person by entering the last name before the first name. Searching for 佐々木律子 returns any person who has both the last name 佐々木 and first name 律子.

How Is Search Different Between Lightning Experience, Salesforce Classic, and Salesforce1?

Global search in the full Salesforce site (whether Lightning Experience or Salesforce Classic) and Salesforce1 mobile app uses the same search index, so you're always searching the same data. You see the same set of recently accessed records in instant results, and search results are influenced by the same search scope (the list of objects you use the most). But remember that some standard objects aren't available in Salesforce1 and Lightning Experience, so you won't always see the exact same search results. And the global search interface is different between all of these experiences, so there are visual and navigational differences to consider.

Feature	Salesforce1 Downloadable Apps for Android and iOS	Salesforce1 Mobile Browser App	Full Site Lightning Experience	Full Site Salesforce Classic
Access Global Search	Search box at the top of the Salesforce1 navigation menu	Search icon located in the header	Search box located in the header	Search box located in the header
Instant Results When Search Box is Selected	You see a list of your most recently used records across all objects.	You see a list of your most recently used records for the object currently selected in the search scope bar.	You see a list of your most recently used records across all objects.	Not available. You must start typing to see instant results.
Instant Results as You Type	The list of most recently used records is filtered by the characters you type.	The list of most recently used records is filtered by the characters you type. As you type, the list also starts showing matching records that you haven't accessed recently.	The list of most recently used records is filtered by the characters you type. As you type, the list also starts showing matching records that you haven't accessed recently.	The list of most recently used records is filtered by the characters you type.
Full Search Results	You see the top three records for each of your most recently used objects. Results are grouped by object and sorted by relevancy.	You see several results for the object selected in the search scope bar. Change the object to see additional results. Results are sorted by relevancy.	You see results for the object selected in the search scope bar. **Top Results** lists the top results for most frequently used objects. Change the object to see additional results. Results are sorted by relevancy.	You see the top five records for each of your most recently used objects. Results are grouped by object and sorted by relevancy
Refine Search Results	Not available.	You can re-sort results by field type.	Not available.	You can re-sort results by column heading. Filtering is also available if enabled by your administrator.
Feed Search	Global search doesn't find information in feeds. Use feed search instead. On the Feed page, pull down from the top of the page to expose the search box.	From the search results page, select **Feeds** in the search scope bar to see results from the All Company Feed.	You use global search on Feeds home to see results from the All Company feed. If you didn't search from Feeds home, switch to **Feeds** on the search scope bar.	From the search results page, use **Search Feeds** to see results from everything at your company.

How Do I Search in Lookup Fields?

Use lookup dialog search to associate two records together.

IN THIS SECTION:

Lookup Dialog Search in Salesforce Classic

Lookup fields allow you to associate two records together in a relationship. For example, a contact record includes an account lookup field that associates the contact with its account.

Lookup Dialog Search in Lightning Experience

Lookup fields allow you to associate two records together in a relationship. For example, a contact record includes an account lookup field that associates the contact with its account. In the lookup search for searchable objects, terms are matched against all searchable fields within a record, not just the name of the record. Lookups have similar instant result and record indexing behavior as global search. If you don't see a record in the auto-suggested instant results, perform a full search. If you don't see a new record in search results, wait 15 minutes and try again. Check out some more answers to frequently asked questions about lookups.

Lookup Dialog Search in Salesforce Classic

Lookup fields allow you to associate two records together in a relationship. For example, a contact record includes an account lookup field that associates the contact with its account.

IN THIS SECTION:

Lookup Dialog Search

Salesforce objects often include *lookup fields* that allow you to associate two records together in a relationship. For example, a contact record includes an `Account` lookup field that associates the contact with its account.

Tips for Using Standard and Enhanced Lookups

Consider these tips when using standard and enhanced lookups.

Lookup Auto-Completion

If enabled by your administrator, lookups support auto-complete.

Lookup Dialog Search

Salesforce objects often include *lookup fields* that allow you to associate two records together in a relationship. For example, a contact record includes an `Account` lookup field that associates the contact with its account.

Lookup fields appear with the 🔍 button on record edit pages. Clicking 🔍 opens a lookup search dialog that allows you to search for the record that you want to associate with the record you're editing. A *blank lookup* is performed when you click the lookup icon without entering a search term.

Salesforce provides two types of lookups.

Standard Lookups

All lookup fields use standard lookup search by default. In standard lookup searches, Salesforce queries a limited set of searchable fields for each object. Search results contain up to 50 records at a time. Standard objects are listed in ascending alphabetical order. Custom objects are listed in descending order by the date when you most recently accessed them. You can't sort, filter, or customize the columns in the search results.

Enhanced Lookups

If enabled by your administrator, Salesforce uses enhanced lookup search for account, contact, opportunity, user, and custom object lookup fields. Enhanced lookups offer more search capabilities compared to standard lookups:

- By default, enhanced lookups query a limited set of fields, known as *Name* fields for each object. If your search for a record returns a large number of matches, such as a contact with a widely used name, you can instead query all searchable fields for that record to narrow your results. If available in the enhanced lookup search dialog, select **All Fields** and enter other search terms unique to the record, such as the contact's email address.

- Enhanced lookup search queries are broken into separate search terms at alphabetic, numeric, and special character boundaries. For example, if you enter `ALL4ONE` in an enhanced lookup field, the resulting query searches for *ALL* and *4* and *ONE*. Consequently, entering `ALL and 4 and ONE` returns matches for *ALL4ONE*. Also, searching for `S&` returns fields containing both *S&* and *&S*.

- You can sort and filter the results of enhanced lookup searches. You can also hide and organize the columns that are displayed in the results window.

  > **Note:** In addition to user-controlled filters, administrators can create lookup filters on fields that are in a lookup, master-detail, or hierarchical relationship to limit the valid values in lookup dialog results for the field.

- Enhanced lookups return all records that match your search criteria and allow you to page through large sets of search results.

> **Note:** Salesforce only returns matches for a custom object if your administrator has associated a custom tab with it. You don't have to add the tab for display.

When you perform a *blank lookup*, a list of all recently used records displays. Search results vary for some object types:

- For standard lookups of products and queues, the dialog shows an alphabetical listing of the first 50 records.

- For standard lookups of campaigns, the dialog shows the first 100 active campaigns.

- For the asset standard lookup on a case, the dialog shows all the assets tied to the contact on the case, if any.

- For standard or enhanced lookups of users, the dialog shows a list of recently accessed user records from across your organization.

Tips for Using Standard and Enhanced Lookups

Consider these tips when using standard and enhanced lookups.

- In standard lookup searches, a wildcard is automatically appended to each of your search terms. For example, a search for `bob jo` is really a search for `bob* jo*` and returns items with *bob jones*, *bobby jones*, or *bob johnson*. You can also explicitly use an asterisk (*) wildcard in your search string.

- For enhanced lookups in particular, the wildcard can't be the first character in the search term or phrase, and search results may include more records than you expect if your search terms contain a combination of letters, numbers, and special characters.

- If you enter a value in the lookup text box and save the record without clicking the lookup icon (🔍), Salesforce automatically performs a standard lookup search. If it finds an exact match, it saves that value to the lookup field, even if it finds other partial matches. If it doesn't find an exact match and finds one or more partial matches, Salesforce requires you to select a value from a drop-down list of matches. If no results match the text you entered, an error displays instead.

- To search for contacts, leads, users, or other individuals that include spaces in the `First Name` or `Last Name` fields, enter quotes around the terms.

  For example, to search for someone with the last name *von hausen*, enter `"von hausen"`.

- In organizations where the Salesforce Customer Portal or partner portal is enabled, you can filter the results that appear on the user lookup dialog by selecting either a queue or group of users from the `Owner` or `Assigned To` drop-down list.

EDITIONS
Available in: Salesforce Classic
Available in: **All** Editions

- If your organization uses divisions and you have the "Affected by Divisions" permission, your lookup dialog search results include records in the division you select in the lookup dialog window.

Lookup Auto-Completion

If enabled by your administrator, lookups support auto-complete.

Both standard lookups and enhanced lookups can display a dynamic list of matching recently used records when a lookup field is edited. This list is restricted to objects of the appropriate type and, with the exception of lookups of users, is populated from recently used items. For example, while editing an Account lookup, you can see recently used accounts with names that match the prefix you have entered. Recently used contacts don't appear in this list.

Lookup auto-completion is subject to the following restrictions:

EDITIONS
Available in: Salesforce Classic
Available in: **All** Editions

- You must have recently visited records of the appropriate type for the lookup's auto-completion list to be populated.
- You must be editing the lookup field on a record's edit page.

Hover details are displayed only for lookup fields on object types that are included in lists of recently used records. For example, products aren't included in lists of recently used records, so hover details aren't displayed for a lookup field on products.

Lookup Dialog Search in Lightning Experience

Lookup fields allow you to associate two records together in a relationship. For example, a contact record includes an account lookup field that associates the contact with its account. In the lookup search for searchable objects, terms are matched against all searchable fields within a record, not just the name of the record. Lookups have similar instant result and record indexing behavior as global search. If you don't see a record in the auto-suggested instant results, perform a full search. If you don't see a new record in search results, wait 15 minutes and try again. Check out some more answers to frequently asked questions about lookups.

EDITIONS
Available in: Lightning Experience
Available in: **All** Editions except **Personal Edition, Contact Manager Edition, Corporate Social Network Edition**

IN THIS SECTION:

Why Can't I See Any Results in the Picklist?

If an object hasn't been made searchable in your org or if you haven't previously viewed the record, the drop-down menu is empty.

Can I Use a Partially Matching Search?

To find the correct record, enter the full search term. The lookup search does not use automatic partially matching searches with trailing wildcards. This is to avoid returning unwanted results to you.

What Determines the Secondary Field Under the Record Name?

In lookups, there's a secondary, smaller field displayed under the primary record name in lookups. For example, the location San Francisco appears under the company Acme, Inc. to help you distinguish similar record names. Your administrator customizes secondary fields when setting which record fields display and in which order.

When you start typing in the lookup field, you see a list of auto-suggested results. These instant results are matches for the search term to the name type field of the record. However, if you perform a full search, the returned results match the search term to all searchable fields for the object. This behavior is similar to global search results.

SEE ALSO:

Why Can't I See Any Results in the Picklist?

If an object hasn't been made searchable in your org or if you haven't previously viewed the record, the drop-down menu is empty.

EDITIONS

Available in: Lightning Experience

Available in: **All** Editions except **Personal Edition, Contact Manager Edition, Corporate Social Network Edition**

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EDITIONS

Available in: Lightning Experience

Available in: **All** Editions except **Personal Edition, Contact Manager Edition, Corporate Social Network Edition**

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EDITIONS

Available in: Lightning Experience

Available in: **All** Editions except **Personal Edition, Contact Manager Edition, Corporate Social Network Edition**

Which Fields are Searched in Lookup Dialog Search?

When you start typing in the lookup field, you see a list of auto-suggested results. These instant results are matches for the search term to the name type field of the record. However, if you perform a full search, the returned results match the search term to all searchable fields for the object. This behavior is similar to global search results.

Which Fields Are Searchable?

Salesforce searches a unique set of fields for each object.

> ✏️ **Note:** When you search for a value in a field that's hidden from you by field-level security, your results include the record that contains the field. However, you can't see the field.

IN THIS SECTION:

Searchable Fields by Object in Salesforce Classic

Each search type—sidebar, advanced, global, and lookup—searches a unique set of fields for each object. Your search results for a particular object depend on two factors: the type of search and the searchable fields for that object.

Searchable Fields by Object in Lightning Experience

The records included in search results depend on whether the record's object type and its fields are searchable. If you search for an object with a value that's stored in a field that isn't searchable, you won't see your desired object in your search results.

Searchable Fields by Object in Salesforce Classic

Each search type—sidebar, advanced, global, and lookup—searches a unique set of fields for each object. Your search results for a particular object depend on two factors: the type of search and the searchable fields for that object.

For example, consider an account that contains "Acme" in its `Description` field. The `Description` field isn't queried by standard lookup search, but is queried by global search and enhanced lookup search when **All Fields** is selected. So a search for Acme returns this account record only if you use either global search or enhanced lookup search with **All Fields** selected.

A few things to note about searchable fields:

- Global search finds more fields per object compared to other search types.
- By default, enhanced lookups query a limited set of fields, known as *Name* fields for each object. If your search for a record returns a large number of matches, such as a contact with a widely used name, you can instead query all searchable fields for that record to narrow your results. If available in the enhanced lookup search dialog, select **All Fields** and enter other search terms unique to the record, such as the contact's email address.
- You can't search encrypted, formula, and lookup fields.
- You can't find some objects with sidebar search or advanced search. Use global search or the search on the object's tab to find:
  - Articles

    – Chatter groups, files, topics, and people

    – Salesforce CRM Content

    – Documents

    – Price books

    – Products

    – Solutions

Note: When you search for a value in a field that's hidden from you by field-level security, your results include the record that contains the field. However, you can't see the field.

This table shows the types of search supported for each object. Follow the links to see the list of searchable fields for each object.

Object	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search	Global Search
Asset	✓	✓			✓
Attachment	✓	✓			✓
Business Account	✓	✓	✓	✓	✓
Campaign	✓	✓	✓		✓
Calendar Event	✓	✓			✓
Case	✓	✓	✓		✓
Chatter Feed					✓
Chatter Group					✓
Coaching	✓	✓			✓
Community			✓		
Contact	✓	✓	✓	✓	✓
Salesforce CRM Content					✓
Contract	✓	✓	✓		✓
Contract Line Item	✓	✓			✓
Custom Object	✓	✓	✓	✓	✓
D&B Company	✓	✓			✓
Dashboard	✓	✓			✓
Discussion			✓		
Document			✓		✓
Entitlement	✓	✓			✓
External Object					✓

Object	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search	Global Search
File					✔
Goal	✔	✔			✔
Idea	✔	✔	✔		✔
Knowledge Article					✔
Lead	✔	✔	✔		✔
Live Chat Transcript		✔			✔
Macro	✔	✔			✔
Metric	✔	✔			✔
Note	✔	✔			✔
Opportunity	✔	✔	✔	✔	✔
Order	✔	✔			✔
People					✔
Performance Cycle	✔	✔			✔
Person Account	✔	✔	✔	✔	✔
Price Book			✔		✔
Product			✔		✔
Question	✔	✔			✔
Quick Text	✔	✔			✔
Quote	✔	✔	✔		✔
Report	✔	✔			✔
Requested Meeting	✔	✔			✔
Reward Fund	✔	✔			✔
Reward Fund Type	✔	✔			✔
Self-Service User			✔		
Service Contract	✔	✔			✔
Skill	✔	✔			✔
Solution			✔		✔
Task	✔	✔			✔
Topic	✔	✔			✔

Object	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search	Global Search
User	✓	✓	✓	✓	✓

Searchable Fields: Asset

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Asset Name	✓	✓	✓
Description		✓	✓
Serial Number	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Attachment

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Description		✓	✓
Name	✓	✓	✓

The contents of attachments are not searchable.

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Business Account

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
Account Name	✓	✓	✓	✓	✓
Account Name (Local)	✓	✓	✓	✓	✓
Account Number		✓			✓
Account Site	✓	✓			✓
Billing Address		✓			✓
Description		✓			✓
D-U-N-S Number (This field is only available to organizations that use Data.com Prospector)		✓			✓
Fax	✓	✓			✓
Phone	✓	✓			✓
Shipping Address		✓			✓
Ticker Symbol	✓	✓			✓
Website	✓	✓		✓	✓
All custom auto-number fields and custom fields	✓	✓			✓

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
that are set as an external ID (You don't need to enter leading zeros.)					
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓			✓

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Campaign

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Campaign Name	✓	✓	✓	✓
Description		✓		✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓		✓

EDITIONS

Available in: Salesforce Classic

Available in:
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓		✓

SEE ALSO:

Searchable Fields: Case

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Case Comments		✓		✓
Case Number (You don't need to enter leading zeros.)	✓	✓	✓	✓
Description		✓		✓
Subject	✓	✓		✓
Web Company (of person who submitted the case online)	✓	✓		✓
Web Email (of person who submitted the case online)	✓	✓		✓
Web Name (of person who submitted the case online)	✓	✓		✓
Web Phone (of person who submitted the case online)	✓	✓		✓
All custom auto-number fields and custom	✓	✓		✓

EDITIONS

Available in: Salesforce Classic

Available in:
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
fields that are set as an external ID (You don't need to enter leading zeros.)				
All custom fields of type text, text area, long text area, rich text area, email, and phone		✔		✔

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Chatter Feed

To find information in a feed, use global search or feed search. Neither sidebar search nor advanced search are designed to find information in Chatter feeds.

📝 **Note:** Global search and feed search return matches for file or link names shared in posts, but not in comments.

Searchable Fields	Sidebar Search	Advanced Search	Global Search	Feed Search
@*Name* (where *Name* is a username)			✔	✔
Comment Body			✔	✔
Commenter Name			✔	✔
File Name			✔	✔
Group Name			✔	✔
Links			✔	✔
Origin of Post (Group, Person, or Record Name			✔	✔

Searchable Fields	Sidebar Search	Advanced Search	Global Search	Feed Search
Post Body			✓	✓

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Chatter Group

Neither sidebar search nor advanced search are designed to find Chatter groups. To find a Chatter group, use global search or the search tools on the Groups tab. Global search results include archived groups.

Searchable Fields	Sidebar Search	Advanced Search	Global Search	Groups Tab
Description			✓	✓
Group Name			✓	✓

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Coaching

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Name	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Community

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Community Name			✓	

SEE ALSO:

Searchable Fields: Contact

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
Assistant	✓	✓			✓
Asst. Phone	✓	✓			✓
Department		✓			✓
Description		✓			✓
Email	✓	✓			✓
Fax	✓	✓			✓
First Name	✓	✓	✓	✓	✓
First Name (Local)	✓	✓	✓	✓	✓
Home Phone	✓	✓			✓
Last Name	✓	✓	✓	✓	✓
Last Name (Local)	✓	✓	✓	✓	✓
Mailing Address		✓			✓
Middle Name	✓	✓		✓	✓

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
Middle Name (Local)	✓	✓		✓	✓
Mobile	✓	✓			✓
Other Address		✓			✓
Other Phone	✓	✓			✓
Phone	✓	✓			✓
Suffix	✓	✓		✓	✓
Title		✓			✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓			✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓			✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Salesforce CRM Content

Neither sidebar search nor advanced search are designed to find content. To find content, use global search (results appear as files) or the search tools on the Content tab.

Searchable Fields	Sidebar Search	Advanced Search	Global Search	Content Tab
Body			✓	✓
Description			✓	✓
File			✓	✓
Owner			✓	✓
Title			✓	✓
Version			✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)			✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone			✓	✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Contract

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Billing Address		✓		✓
Billing Name (First and Last)	✓	✓	✓	✓

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Contract Name	✓	✓	✓	✓
Contract Number	✓	✓	✓	✓
Description		✓		✓
Shipping Address		✓		✓
Special Terms		✓		✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓		✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓		✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Contract Line Item

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Description		✓	✓
Name	✓	✓	✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions with the Service Cloud

Searchable Fields: Custom Object

Custom object records are searchable in the Salesforce user interface only if the custom object is associated with a custom tab. Users aren't required to add the tab for display.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
Name	✓	✓	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓			✓
All custom fields of type email and phone	✓	✓			✓
All custom fields of type text, text area, long text area, and rich text area		✓			✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: D&B Company

To have access to D&B Company records, your organization must have Data.com Premium Prospector or Data.com Premium Clean.

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Company City		✓	✓
Company Country		✓	✓
Company Description		✓	✓
D-U-N-S Number		✓	✓
Facsimile Number	✓	✓	✓
Mailing Address		✓	✓
Primary Address		✓	✓
Primary Business Name	✓	✓	✓
Telephone Number	✓	✓	✓
URL		✓	✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Dashboard

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Title	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓

Searchable Fields	Sidebar Search	Advanced Search	Global Search
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Discussion

Discussions support only standard lookup searches.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Title			✓	

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Document

To find a document, use global search or the **Find Document** button on the Documents tab. Neither sidebar search nor advanced search are designed to find documents.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search	Documents Tab
Name			✓	✓	✓
Body				✓	✓
Keywords			✓	✓	✓
All standard text fields				✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)				✓	✓

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search	Documents Tab
All custom fields of type text, text area, long text area, rich text area, email, and phone				✓	✓

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Entitlement

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Name	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: External Object

An external object accesses data that's stored outside your Salesforce organization. Which external object fields are searched depends on how the external system handles searches. If the search results aren't as you expected, use case-sensitive search strings that contain only alphanumeric characters. If the results still aren't as expected, contact your administrator for recommendations on searching your specific external system.

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Text, text area, and long text area fields			✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: File

Neither sidebar search nor advanced search are designed to find files. To find a file, use global search or the search tools on the Files tab.

Searchable Fields	Sidebar Search	Advanced Search	Global Search	Files Tab
Body			✓	✓
Description			✓	✓
Extension (such as ppt)			✓	✓
Name			✓	✓
Owner			✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)			✓	✓

Searchable Fields	Sidebar Search	Advanced Search	Global Search	Files Tab
All custom fields of type text, text area, long text area, rich text area, email, and phone			✓	✓

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Goal

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Description		✓	✓
Name	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

EDITIONS

Available in: Salesforce Classic

Available in:
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Idea

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Body		✓		✓
Comment		✓		✓
Description		✓		✓

EDITIONS

Available in: Salesforce Classic

Available in:
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Title	✓	✓	✓	✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Knowledge Article

Neither sidebar search nor advanced search are designed to find articles. To find an article, use global search or the search tools in the sidebar on the Articles tab.

<table>
<tr><td>Searchable Fields</td><td>Sidebar Search</td><td>Advanced Search</td><td>Global Search</td><td>Articles Tab</td></tr>
<tr><td>All standard text fields</td><td></td><td></td><td>✓</td><td>✓</td></tr>
<tr><td>Body</td><td></td><td></td><td>✓</td><td>✓</td></tr>
<tr><td>File</td><td></td><td></td><td>✓</td><td>✓</td></tr>
<tr><td>Summary</td><td></td><td></td><td>✓</td><td>✓</td></tr>
<tr><td>Title</td><td></td><td></td><td>✓</td><td>✓</td></tr>
<tr><td>URL</td><td></td><td></td><td>✓</td><td>✓</td></tr>
<tr><td>All custom auto-number fields and custom fields that are set as an external ID

(You don't need to enter leading zeros.)</td><td></td><td></td><td>✓</td><td>✓</td></tr>
<tr><td>All custom fields of type text, text area, long text area, rich text area, email, and phone</td><td></td><td></td><td>✓</td><td>✓</td></tr>
</table>

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Lead

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
Address		✓		✓
Company	✓	✓	✓	✓
Company (Local)	✓	✓	✓	
Description		✓		✓
Email	✓	✓		✓
Fax	✓	✓		✓
First Name	✓	✓	✓	✓
First Name (Local)	✓	✓	✓	✓
Last Name	✓	✓	✓	✓
Last Name (Local)	✓	✓	✓	✓
Middle Name	✓	✓		✓
Mobile	✓	✓		✓
Phone	✓	✓		✓
Suffix	✓	✓		✓
Title		✓		✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓		✓

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓		✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Live Chat Transcript

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Body		✓	✓
Supervisor Transcript Body		✓	✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Macro

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Description		✓	✓
Name	✓	✓	✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Metric

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Description		✓	✓
Name	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Note

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Body		✓	✓
Title	✓	✓	✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Opportunity

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
Description		✓			✓
Opportunity Name	✓	✓	✓	✓	✓
Account Name			✓		
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓			✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓			✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Order

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Billing Address		✓	✓
Description		✓	✓
External Note		✓	✓
Internal Comments		✓	✓
Order Name	✓	✓	✓
Order Reference Number		✓	✓
PO Number		✓	✓
Processing Instruction		✓	✓
Shipping Address		✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: People

Neither sidebar search nor advanced search are designed to find people; however, sidebar search and advanced search can be used to find users. See Searchable Fields: User.

To find people, use global search or the search tools on the People tab.

Searchable Fields	Sidebar Search	Advanced Search	Global Search	People Tab
About Me			✓	
Email			✓	
First Name			✓	✓
Last Name			✓	✓
Name			✓	✓
Nickname			✓	✓
Phone			✓	
Record ID (15 character Record ID only)			✓	
Username			✓	
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)			✓	
All custom fields of type text, text area, long text area, rich text area, email, and phone			✓	

> **Note:** Information in hidden fields on a profile is not searchable by other partners and customers in the community, but is searchable by users in the company's internal organization.

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Performance Cycle

Searchable Fields	Sidebar Search	Advanced Search	Global Search
`Name`	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

SEE ALSO:

Searchable Fields: Person Account

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
`Account Name`	✓	✓	✓	✓	✓
`Account Name (Local)`	✓	✓	✓	✓	✓
`Account Number`	✓	✓			✓
`Account Site`	✓	✓			✓
`Assistant`	✓	✓			✓
`Assistant Phone`	✓	✓			✓

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
Billing Address		✓			✓
Description		✓			✓
Email	✓	✓			✓
Fax	✓	✓			✓
Home Phone	✓	✓			✓
Mailing Address		✓			✓
Mobile	✓	✓			✓
Other Address		✓			✓
Other Phone	✓	✓			✓
Shipping Address		✓			✓
Ticker Symbol	✓	✓			✓
Title		✓			✓
Website	✓	✓		✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓			✓
All account and contact custom fields of type text, text area, long text area, rich text area, email, and phone		✓			✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Price Book

Neither global search, sidebar search, nor advanced search are designed to find price books. To find a price book, use the **Price Books** area on the Products tab.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search	Products Tab Search
Price Book Description				✓	✓
Price Book Name			✓	✓	✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Product

Neither sidebar search nor advanced search are designed to find price books or products. To find a product, use global search or the **Find Products** area on the Products tab.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search	Products Tab Search
Last Name				✓	✓
Product Code			✓	✓	✓
Product Description				✓	✓
Product Name			✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)				✓	✓

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search	Products Tab Search
All custom fields of type text, text area, long text area, rich text area, email, and phone				✓	✓

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Question

The Answers tab in Salesforce lists all the questions posted to an answers community.

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Question Body		✓	✓
Question Title	✓	✓	✓
Reply Body		✓	✓

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Quick Text

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Message		✓	✓
Name	✓	✓	✓

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Quote

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup	Global Search
Quote Name	✓	✓	✓	✓
Quote Number	✓	✓		✓
All custom fields of type text, text area, long text area, rich text area, email, and phone				✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Report

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Description	✓	✓	✓
Report Name	✓	✓	✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: Reward Fund

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Name	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓

Searchable Fields	Sidebar Search	Advanced Search	Global Search
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Reward Fund Type

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Name	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Self-Service User

Self-service users support only standard lookup searches.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Global Search
First Name			✓	
Last Name			✓	

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Service Contract

Searchable Fields	Sidebar Search	Advanced Search	Global Search
`Contract Number`	✓	✓	✓
`Description`		✓	✓
`Name`	✓	✓	✓
`Special Terms`		✓	✓

> **EDITIONS**
>
> Available in: Salesforce Classic
>
> Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions with Service Cloud

Searchable Fields: Skill

Searchable Fields	Sidebar Search	Advanced Search	Global Search
`Name`	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

> **EDITIONS**
>
> Available in: Salesforce Classic
>
> Available in:
> - Professional
> - Enterprise
> - Performance
> - Unlimited
> - Developer

Searchable Fields: Solution

Neither sidebar search nor advanced search are designed to find solutions. To find a solution, use global search or the **Find Solution** button on the Solutions tab.

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Task, Calendar Event, and Requested Meeting

Archived activities aren't searchable.

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Description (task and events only)		✓	✓
Subject	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

SEE ALSO:

[Searchable Fields by Object in Salesforce Classic](#)

Searchable Fields: Topic

Neither sidebar search nor advanced search are designed to find topics. To find a topic, use global search.

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Description		✓	✓

Searchable Fields	Sidebar Search	Advanced Search	Global Search
Name	✓	✓	✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields: User

If you're using Chatter and searching for people, see Searchable Fields: People.

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
About Me		✓			✓
Email	✓	✓			✓
First Name	✓	✓	✓	✓	✓
Last Name	✓	✓	✓		✓
Middle Name	✓	✓		✓	✓
Name	✓	✓	✓	✓	✓
Nickname	✓	✓			✓
Phone	✓	✓			✓
Record ID (15 character Record ID only)	✓	✓			✓
Suffix	✓	✓		✓	✓
Username	✓	✓			✓
All custom auto-number fields and custom fields that are set as an external ID	✓	✓			✓

Searchable Fields	Sidebar Search	Advanced Search	Standard Lookup Search	Enhanced Lookup Search—Name Fields	Global Search and Enhanced Lookup Search—All Fields
(You don't need to enter leading zeros.)					
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓			✓

SEE ALSO:

Searchable Fields by Object in Salesforce Classic

Searchable Fields by Object in Lightning Experience

The records included in search results depend on whether the record's object type and its fields are searchable. If you search for an object with a value that's stored in a field that isn't searchable, you won't see your desired object in your search results.

> Note: When you search for a value in a field that's hidden from you by field-level security, your results include the record that contains the field. However, you can't see the field.

Reference the table to determine which objects you can find with a search. If an object has custom fields, you can find records of that object with the custom field values.

Object	Fields
Account	Account Name
	Account Name (Local)
	Account Number
	Account Site
	Billing Address
	Description
	D-U-N-S Number (This field is only available to organizations that use Data.com)
	Fax
	Phone
	Shipping Address
	Ticker Symbol
	Website

Object	Fields
	All custom fields
Attachment	Description
	Name
Case	Case Comments
	Case Number
	Description
	Subject
	Web Company (of person who submitted the case online)
	Web Email (of person who submitted the case online)
	Web Name (of person who submitted the case online)
	Web Phone (of person who submitted the case online)
Chatter Feed	@*Name* (where *Name* is a username)
	Comment Body
	Commenter Name
	File Name
	Group Name
	Links
	Post Body
	Post Origin (Person, Group, Record Name)
Chatter Groups	Group Description
	Group Name
Contact	Assistant Name
	Asst. Phone
	Department
	Description
	Email
	Fax
	First Name
	First Name (Local)
	Home Phone
	Last Name
	Last Name (Local)

Object	Fields
	Mailing Address
	Middle Name
	Middle Name (Local)
	Mobile
	Other Address
	Other Phone
	Phone
	Suffix
	Title
Custom Objects	Name
	All custom auto-number fields and custom fields that are set as an external ID
	All custom fields of type email and phone
	All custom fields of type text, text area, long text area, and rich text area
Dashboard	Title
Document	Body
	Name
File	Body
	Description
	Extension (such as ppt)
	Name
	Owner
Lead	Address
	Company
	Company(Local)
	Description
	Email
	Fax
	First Name
	First Name (Local)
	Last Name

Object	Fields
	Last Name (Local)
	Middle Name
	Mobile
	Phone
	Suffix
	Title
Note	Body
	Title
Opportunity	Description
	Opportunity Name
	Account Name
People	About Me
	Email
	First Name
	Last Name
	Name
	Nickname
	Phone
	Record ID (15 character Record ID only)
	Username
Price Book	Price Book Description
	Price Book Name
Product	Last Name
	Product Code
	Product Description
	Product Name
Report	Description
	Report Name

Search Results

Search results are ordered by relevancy for the user. In many cases, you can quickly find the record you searched for by just reviewing the top results. We've included our guidelines for users who navigate around the search results page. Check out some more answers to frequently asked questions about search results.

IN THIS SECTION:

How Are Search Results Ordered?

The search engine sorts results most relevant to the user based on search term frequency, order, and uniqueness, record and user activity, and access permissions. Search result relevancy can vary for each user.

How Do I Refine Search Results?

Use these guidelines to quickly find records on the search result page.

Are Nicknames Included in the Search Results?

When searching for an account, a contact, a lead, or a user, search returns results that include alternative versions of the name used in the search.

Are Different Forms of the Search Term Included in the Search Results?

Searches expand to match different forms of a search term with a process called lemmatization.

What Are the Results I See As I Type in the Search Bar?

As you type in the global search box, a list of auto-suggested records appears. These instant results let you quickly access a record before performing a full search.

How Are Search Results Ordered?

The search engine sorts results most relevant to the user based on search term frequency, order, and uniqueness, record and user activity, and access permissions. Search result relevancy can vary for each user.

Priority Boosts and Filters

The search engine uses various types of priority boosts and filters to prioritize records that are most relevant to the user performing the search. Boosts and filters aren't listed in the order they are applied or by importance.

Frequency

Prioritizes records that include more occurrences of the search terms. In addition, records that contain all or more of multiple search terms entered are prioritized higher.

Uniqueness

Prioritizes records that contain unique terms, under the assumption that uniqueness increases the likelihood of a relevant match.

Location

Prioritizes records with the search term in the name, title, or subject type fields.

Proximity

Prioritizes records with the search terms closer together with few or no intervening words. Records that contain the same sequence of terms are prioritized higher. Similarly, if a single alphanumeric string is indexed with multiple tokens, exact matches are prioritized over matches with intervening words.

Ownership

Prioritizes records that you own.

Length

Normalizes the number of instances of a term in a record so that longer documents aren't given undue priority over shorter ones. This boost applies to Salesforce Knowledge records only.

Record Activity

Prioritizes records frequently viewed or edited and records having more associated records, such as related lists. The creation date of the data doesn't affect result priority.

User Activity

Prioritizes records that you recently edited or viewed.

Access

Returns only the records that you have access to view.

Why do different users see different results?

Searches are configured for the user who performs the search, including:

- Access permissions are based on the users' profiles. If you don't have access to a record, but someone else does, it appears for them but not you.

- Record ownership boosts records in results. If you own the record, it appears higher in the search results.

- View or edit record history boosts records in results. If you recently viewed or edited a record, the record is prioritized higher in the search than someone else viewing it for the first time.

- Object history boosts records in results. Records from object types that you use more frequently have higher priority in your search results.

How Do I Refine Search Results?

Use these guidelines to quickly find records on the search result page.

IN THIS SECTION:

How Do I Refine Search Results in Salesforce Classic?

Use our guidelines for sorting and filtering your results to quickly find records.

How Do I Refine Search Results in Lightning Experience?

Use our guidelines for navigating the search results page to quickly find records.

EDITIONS
Available in: both Salesforce Classicand Lightning Experience
Available in all editions

How Do I Refine Search Results in Salesforce Classic?

Use our guidelines for sorting and filtering your results to quickly find records.

When you use the global search bar, you search through all objects and multiple fields types, including custom and long text fields, within a record. If you enter multiple terms, results containing all the search terms are returned, which can be a lot of records! Here are some strategies to find the record that you're looking for after performing a full search.

EDITIONS
Available in: Salesforce Classic
Available in all editions

Searching All

Search defaults to return results for the objects that you use most frequently. To expand the search to other objects, use **Search All**.
If you don't have a **Search All** option, global search doesn't have enough information about which objects you use. Your results
include all objects until it has more information.

Pinning

Hover over and pin important objects to the top of the search results object list. You can always unpin or reorder objects later. Pinning
is helpful for objects that you don't use frequently.

Filtering

- Use **Options…** to restrict your search to records you own, if available, to exact phrase searches, and to divisions, if your organization
  uses them.

- Use **Show Filters**, if available, to filter your search results. You can click My Columns to customize how the columns display.

More Guidelines

- Make sure that you are on the right object scope. You can change the scope in the left navigation.

- Check your spelling and that you entered the full search term.

- If you recently created the record or the record was changed multiple times, you will not see the record in the search results
  right away. The process for making a record searchable, called indexing, can take 15 minutes.

▶ Search in Salesforce Classic

SEE ALSO:

Why Can't I See Some Features?

How Do I Refine Search Results in Lightning Experience?

Use our guidelines for navigating the search results page to quickly find records.

Top Results: Most Relevant Results on One Page

The Top Results search results page lists the most relevant record results for each of your most
frequently used objects.

This is a good choice when you want to review results for a search term but you aren't looking
for a specific object type. For example, you search for Acme Inc. and look at the Top Results
page for accounts, leads, and opportunities. Each person's Top Results page is different based
on which objects they use the most. There's a **View More** link in case you want to see more
results for an object.

Feeds for All Company Posts

If enabled by your administrator, the Feeds search results page lists posts from the All Company
Feed that include matches on the search term entered.

Using Feeds is helpful when searching for a post that you want to review again. For example, you saw a post about a new training
video, but you don't remember who posted the information.

Your Most Frequently Used Objects Are Front and Center

The search scope bar beneath the global search box lets you quickly click through filtered results by object. Click the object name
to see the results for that object.

Let's say that you search for a contact from the Accounts homepage and landed on the Account search results page. You can click
the Contacts object to see results for contacts.

> **EDITIONS**
>
> Available in: Lightning
> Experience
>
> Available in: **All** Editions
> except **Personal Edition,
> Contact Manager Edition,
> Corporate Social Network
> Edition**

More Lists all Available Objects

> You commonly use a few objects for most of your day-to-day tasks, but you may want to find results for an object that you don't usually work with. If you don't see that object in the search scope bar, select **More** to see a list of all objects that are available to you. If frequently used objects don't fit on the search scope bar, they appear at the top of the **More** object list. Scroll down the alphabetical list to find objects.

More Guidelines

- Check your spelling and that you entered the full search term.
- If you recently created the record or the record was changed multiple times, you will not see the record in the search results right away. The process for making a record searchable, called indexing, can take 15 minutes.

▶ Search in Salesforce Lightning Experience

SEE ALSO:

Why Can't I See Some Features?

Are Nicknames Included in the Search Results?

When searching for an account, a contact, a lead, or a user, search returns results that include alternative versions of the name used in the search.

Can't remember if someone goes by Mike or Michael? You can look for a name and the returned results include matches for associated nicknames. For example, you search for `Mike Smith` and see results for *Michael Smith*. Nickname search is available for the English language only in the Account, Contact, Lead, and User objects.

> **EDITIONS**
>
> Available in: both Salesforce Classic and Lightning Experience
>
> Available in all editions

Are Different Forms of the Search Term Included in the Search Results?

Searches expand to match different forms of a search term with a process called lemmatization.

As part of the search process, a word is reduced to its root form. Search then returns matches for the expanded forms. This behavior applies to the type of word for which you're searching; a search for a noun matches variants of the noun form, a search for a verb matches variants of the verb form. For example, a search for *run* matches items that contain *run*, *running*, and *ran*.

Matches on forms of a search term rank lower than matches on the exact term in search results.

These objects are supported.

> **EDITIONS**
>
> Available in: both Salesforce Classic and Lightning Experience
>
> Available in all editions

- Article
- File

These languages are supported.

- Chinese
- Danish
- Dutch
- English
- French
- German
- Italian

- Japanese
- Korean
- Norwegian
- Portuguese
- Russian
- Spanish
- Swedish
- Thai

What Are the Results I See As I Type in the Search Bar?

As you type in the global search box, a list of auto-suggested records appears. These instant results let you quickly access a record before performing a full search.

Instant results appear when you're looking for records within searchable objects.

The suggested records displayed are those that you recently viewed or that include the search term you entered. If you don't see the record you're looking for in the instant results, perform a full search for more results.

Stopwords, such as *how* and *to*, are included in the instant results for these objects.

- Account
- Campaign
- Case
- Contact
- Contract
- Custom objects
- Endorsement
- Fund
- Goal
- Lead
- Opportunity
- Order
- Reward
- Skill
- Topic
- User

Limitations for Search in Salesforce Classic

When using global search, sidebar search, advanced search, structured queries, list views, and filters, certain restrictions apply.

Chatter and Global Search

When Chatter is enabled, global search and feed search are enabled, but sidebar search and advanced search are disabled. Your organization's administrator must have Chatter enabled to use global search. Search options aren't available to Chatter Free users.

Chatter feed searches aren't affected by your search scope; Chatter feed search results include matches for posts across all objects.

Sidebar and Advanced Search

The table outlines the main differences between the sidebar and advanced search.

Feature	Sidebar	Advanced
Location	If made available, located to the left of the page. The sidebar panel can be customized to be collapsible.	Link to advanced search within the sidebar search.
Record Fields	Searches all fields except long text fields and attachments.	Searches all fields.
Multiple Object Searches	Choose one object by which to limit your search. Select **Search All** to search across all objects.	Choose one or more objects by which to limit your search. Select **Search All** to search across all objects.
Search Terms	Uses a phrase search and matches terms in the exact sequence that they appear. For example, searching for `bob jones` returns items with *Bob Jones*, but not *Bobby Jones* or *Bob T Jones*. In addition, a trailing wildcard is added at the end of the search terms. For example, *Bob T Jones**.	Uses separate word search for searchable fields within a record. For example, searching for `bob jones` returns items with *Bob Jones*, and a contact named Bob Smith because his email address is bsmith@jones.com.
Nickname Search	Doesn't include results for nicknames (abbreviated names associated with the entered search name).	Includes results for nicknames.

Structured Queries Based on Multiple Criteria

To look for records based on a structured query, such as accounts in a certain area or open opportunities within a company, use a list view, report, or dashboard.

Limit to Items I Own

When **Limit to items I own** is selected, the search results don't return asset, idea, invoice, order, question, quote, reply, and user records because these records don't have owners.

Filters

Your administrator determines the available filter fields in a search layout. Search filters aren't available in Customer Portals or partner portals.

When filtering search results, the operator is selected automatically based on the field type. Except as noted, all fields use the contains operator. Auto number and phone fields use the contains operator because they can contain non-numeric characters. The = (equals) operator is used with these types of fields.

- Dates
- Numbers, except auto number or phone fields
- Record IDs

Explicitly using the OR operator is only supported in number fields. Except for number fields, commas are used as OR operators in search results filters. For example, if you enter acme, california in the Account Name filter field, your results include account names with either acme or california. For number fields (where a comma can be part of a number) commas aren't treated as OR operators and you must explicitly enter the OR operator.

If you specify more than one criterion, the result includes only records that match all the criteria. For example, if you enter acme california in the Account Name filter field, your results include account names with both acme and california.

Don't include http:// or https:// in URL filter criteria because you may not get the results that you expect. When you enter values in URL fields and save records, Salesforce adds http:// to any URL that doesn't start with http:// or https://. The added http:// isn't stored in the database. For example, if you enter salesforce.com in the Website field and save the record, the Website field displays http://Salesforce, but the value stored is Salesforce. Therefore, if you enter http://salesforce.com in the Website filter field, your results don't include your record.

IN THIS SECTION:

[Using the Recycle Bin](#)

Using the Recycle Bin

The **Recycle Bin** link in the sidebar lets you view and restore recently deleted records for 15 days before they are permanently deleted. Your Recycle Bin record limit is 25 times the Megabytes (MBs) in your storage. For example, if your organization has 1 GB of storage then your limit is 25 times 1000 MB or 25,000 records. If your organization reaches its Recycle Bin limit, Salesforce automatically removes the oldest records if they have been in the Recycle Bin for at least two hours.

Viewing Items in the Recycle Bin

Choose **My Recycle Bin** from the drop-down list to view just the items you deleted. Administrators, and users with the "Modify All Data" permission, can choose **All Recycle Bin** to view all data that has been deleted for the entire organization. In Personal Edition, the **All Recycle Bin** option shows all of your deleted items.

Searching for Items in the Recycle Bin

1. Choose **My Recycle Bin** or **All Recycle Bin** from the drop-down list. Choosing **My Recycle Bin** searches for matches only in the items you deleted.

2. Enter your search terms. Search terms are treated as separate words with an implied AND between them. For example, searching for *bob jones* returns items with *bob* and *jones* together but not *bob smith* whose email address is *bsmith@jones.com*. An implied wildcard is appended to your search terms so searching for *bob* returns any *bob* or *bobby*. Searches look for matches in the field displayed in the Name column of the Recycle Bin such as lead `Name`, `Case Number`, `Contract Number`, or `Product Name`.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions except for **Database.com**

USER PERMISSIONS

To view and recover your deleted records:
- "Read" on the records in the Recycle Bin

To view and recover records deleted by other users:
- "Modify All Data"

To recover deleted public tags:
- "Tag Manager"

To purge the Recycle Bin:
- "Modify All Data"

> ✎ Note: Some search features, including stemming and synonyms, are not available in the Recycle Bin search.

3. Click **Search**.

Restoring Items in the Recycle Bin

You can restore items by checking the box next to those items and clicking **Undelete**. To restore all deleted items, check the box in the column header and then click **Undelete**.

When you undelete a record, Salesforce restores the record associations for the following types of relationships:

- Parent accounts (as specified in the `Parent Account` field on an account)
- Parent cases (as specified in the `Parent Case` field on a case)
- Master solutions for translated solutions (as specified in the `Master Solution` field on a solution)
- Managers of contacts (as specified in the `Reports To` field on a contact)
- Products related to assets (as specified in the `Product` field on an asset)
- Opportunities related to quotes (as specified in the `Opportunity` field on a quote)
- All custom lookup relationships
- Relationship group members on accounts and relationship groups, with some exceptions
- Tags
- An article's categories, publication state, and assignments

> ✎ Note: Salesforce only restores lookup relationships that have not been replaced. For example, if an asset is related to a different product prior to the original product record being undeleted, that asset-product relationship is not restored.

Purging the Recycle Bin

To permanently remove your deleted items prior to the 15 day period, administrators, and users with the "Modify All Data" permission, can click **Empty your Recycle Bin** or **Empty your organization's Recycle Bin** .

SEE ALSO:

[Deleting Records](#)

Topics

Topics on Records Overview

Topics are words or phrases that you can associate with Salesforce records to organize them around common themes.

Use topics to group records by a common theme, and then use those topics to filter list views. If Chatter is enabled, you can also see records on a topic in one central place—the Records tab of the topic detail page. For example, if a number of accounts are participating in a conference, you might add the topic *User Conference 2014* to their records. You could then use that topic to filter an accounts list view, or (with Chatter) view the accounts together on the Records tab of the *User Conference 2014* topic page.

EDITIONS

Available in: Salesforce Classic

Available in all editions

Here's an example topic detail page, with the Records tab showing accounts on the topic. (If you don't see a Records tab like this for a particular topic, the topic hasn't been added to any records.)
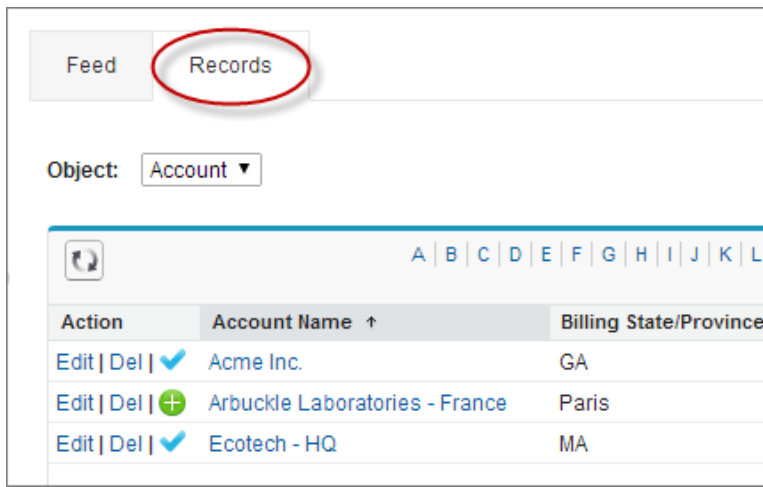
Administrators can enable topics for accounts, assets, campaigns, cases, contacts, contracts, leads, opportunities, orders, solutions, custom objects, and English articles. Topics can also be enabled for tasks and events, they aren't accessible via list views or the Records tab.

Note: Topics are only supported on English Knowledge articles.

SEE ALSO:

Add Topics to Records

Add Topics to Records

Add topics to quickly organize records around common themes, retrieve them in list views, and (with Chatter) view them on topic detail pages.

Topics for objects must be enabled before you can add topics to records of that object type.

Note: All topic names are public and appear in search results, but this doesn't affect the visibility of records that have topics.

1. On the top of the record detail page under the record name, click **Click to add topics**. If the record already has topics, click **Topics**.

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To add topics to a record:
- "Read" and "Edit" on the record

  AND

  "Assign Topics" to add existing topics

  OR

  "Create Topics" to add new topics
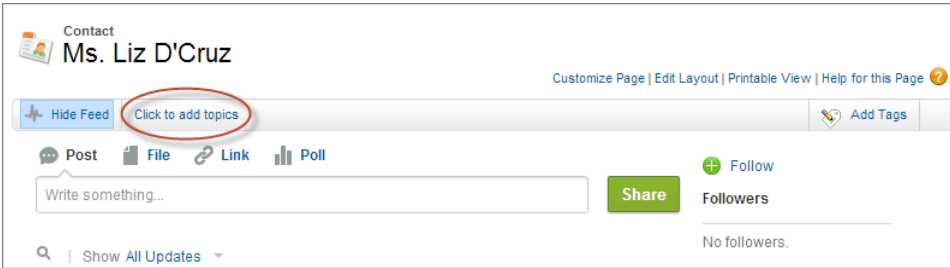
If your administrator enabled feed-based layouts, click **Add Topics** in the sidebar of the feed view.
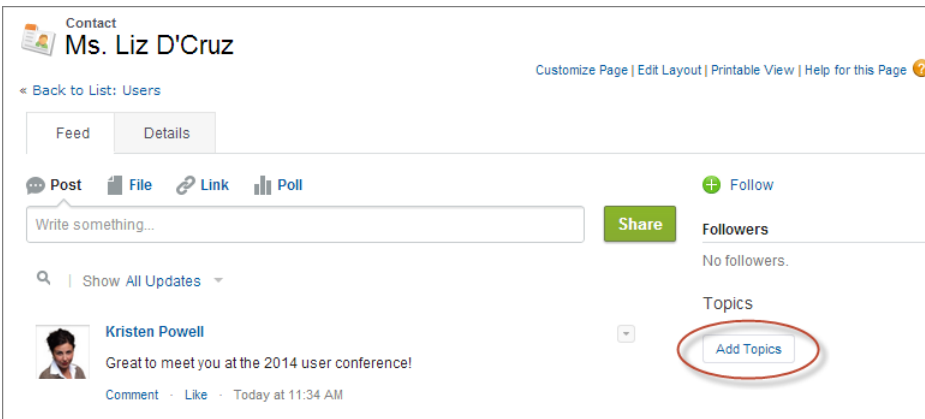
2. In the topic editor, start typing your text. As you type, you can pick a topic from the list of suggestions, or keep typing to create your own unique topic. To add more than one topic, type a comma after each topic.

Commas (,) and closing square brackets ( ]) automatically end a topic. Other punctuation, symbols, and separators are supported in topic names.

Records can have up to 100 topics.

3. When you're done adding topics, click **Done** or press **Enter**.

You can now use topics you add to records to filter your list views. And if your administrator enabled Chatter, topics added to records become links to topic detail pages, where associated records appear on the Records tab for easy access. (Note that Chatter posts on a record aren't automatically added to a record's topics; you must add the topics to the posts.)

SEE ALSO:

Create Custom List Views in Salesforce Classic

Remove Topics from Records

Remove Topics from Records

Remove a topic from a record if it no longer applies.

Removing topics doesn't delete them. Before you remove a topic from a record, consider whether someone else added it; they may be using the topic to track the record.

1. On the top of the record detail page, click **Topics**.

2. Click ✖ next to the topic you want removed from the record.

3. Click **Done** or press ENTER.

Removing a topic from a record removes the record from any list views using that topic as a filter. If Chatter is enabled, the record is also removed from the Records tab of the topic detail page.

Tags

Tags Overview

Tags are words or short phrases that you can associate with most Salesforce records to describe and organize their data in a personalized way. Use tags to group records from various objects by a common theme or use, and then use those tags in search to make finding information fast and intuitive.

For example, if you met a number of contacts and leads at a conference, you might tag them all with the phrase *User Conference 2011*. You could then search for the *User Conference 2011* tag and click that tag in search results to retrieve those records.

Salesforce supports two types of tags.

- *Personal tags* are private. Only you can view any personal tags that you add to a record.

- *Public tags* are shared among all users in an organization. Any user with access to the record can view the public tags that you add.

Administrators can enable personal and public tags for accounts, activities, assets, campaigns, cases, contacts, contracts, dashboards, documents, events, leads, notes, opportunities, reports, solutions, tasks, and any custom objects (except relationship group members), allowing you to:

- Tag records
- Remove tags from a record
- Browse, search, and manage tags

📝 **Note:** If your administrator enables topics for an object, public tags are disabled for that object. Personal tags aren't affected.

Tagging Records

1. On the top right corner of the record detail page, click **Add Tags**. If the record already has associated tags, click **Edit Tags**.

2. In the `Personal Tags` or `Public Tags` text boxes, enter comma-separated lists of the tags that you want to associate with the record. Tags can only contain letters, numbers, spaces, dashes, and underscores, and must contain at least one letter or number.

   As you enter new tags, up to 10 tags that have already been defined are displayed as auto-complete suggestions. As you type, the list of suggestions changes to show only those tags that match the prefix you have entered. To choose a suggestion, click it or use your keyboard arrow keys to select it and press the TAB or ENTER key.

3. Click **Save**.

   💡 Tip: When you create or edit tags, you can press the ENTER key to save your changes or the ESC key to discard them.

   📝 Note: There are limits on the number of personal and public tags you can create and apply to records. For all editions, if you attempt to tag a record with a new tag that exceeds one or more of these limits, the tag isn't saved. If you reach a limit, you can go to the Tags page and delete infrequently used tags.

SEE ALSO:

Tags Overview

Removing Tags from Records

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions except **Database.com**

USER PERMISSIONS

To edit tags on a record:
- "Read" on the record

To rename or delete public tags:
- "Tag Manager"

Removing Tags from Records

1. On the top right corner of the record detail page, click **Edit Tags**.

2. Next to the `Personal Tags` or `Public Tags` text boxes, click **[X]** next to the tag that you want to remove.

3. Click **Save**.

   💡 Tip: When you create or edit tags, you can press the ENTER key to save your changes or the ESC key to discard them.

If the tag that you removed is the last instance of the tag, the tag is deleted from your organization completely. If other records use the tag, the tag still appears in search results and the Tags page.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions except **Database.com**

USER PERMISSIONS

To edit tags on a record:
- "Read" on the record

Browsing, Searching, and Managing Tags

To access the Tags page, click the name of any tag on a detail page, or if your administrator added tags to the sidebar, click **Tags** in the sidebar.

From this page, you can:

- View and browse tags
- Find records with tags
- Search tags
- Rename and delete tags
- Review personal tag statistics

Viewing and Browsing Tags

Use the `Personal Tags` and `Public Tags` checkboxes to limit or expand your view. Because personal tags are private, you can only see the personal tags that you have defined. You can see all public tags that are defined in your organization.

Click a letter at the top of the tag browsing area to view only tags that begin with that letter or click **Next Page** or **Previous Page**.

By default, tags are listed in alphabetical order. From the `Sort` picklist, choose **By Number of Uses** to sort tags by the number of records that are tagged by them, or choose **By Most Recently Used** to sort tags by how recently they were added to a record.

Finding Records with Tags

Click a tag to see the list of records organized by object. The number of records associated with the tag is displayed next to the tag. You can narrow your results further by clicking additional tags. When more than one tag is selected, only records that match all selected tags are displayed in the list of results. Click **[X]** next to a tag to deselect it and remove it from the filter. Click **Clear Selected Tag(s)** to deselect all tags and start over.

> **Note:**
> - The number of records associated with a tag can sometimes be greater than the number of records displayed when you click that tag in the Tags page. This situation occurs if you tagged a record and then lost permission to view it because of a change in sharing, or if a record that you don't have access to has one or more public tags.
> - Search results and the Tags page don't display custom objects without an associated tab, even if tags are enabled for the custom object.

You can customize columns and filter the search results.

Searching Tags

Enter terms in the Search Tags text box and click **Search**. Only tags that meet your search criteria are listed in the tag browsing area. You can then click any tag to view records associated with that tag.

Search strings must include at least two characters and can include wildcards and operators.

The most recent search result is saved in the tag browsing area next to the alphabet at the top of the page. Click the search string to return to your results.

Renaming and Deleting Tags

- To rename a tag, hover over the tag and select **Rename** from the drop-down list that appears around the tag. Enter a new name for the tag in the text box that appears and click **Save**.

- To delete a tag, hover over the tag and select **Delete** from the drop-down list that appears around the tag. The tag is removed from every record in your organization and is placed in the Recycle Bin.

  If you restore a tag from the Recycle Bin, it is automatically reassociated with the records from which it was removed. For more information, see Using the Recycle Bin on page 168.

You can rename or delete any personal tag, but you must have the "Tag Manager" permission to rename or delete a public tag.

Reviewing Personal Tag Statistics

Click **Personal Tag Usage** on the right side. This page displays your current number of unique personal tags and personal tag applications. You can have a maximum of:

- 500 unique personal tags
- 5,000 instances of personal tags applied to records

If you are approaching your personal tag limits, consider merging similar tags into a single tag by renaming. For example, if you have tags for Bicycling, Cycling, and Biking, you can rename Cycling and Biking to Bicycling to reduce your number of unique personal tags.

To reduce the number of instances of tags applied to records, delete personal tags that you no longer use.

Viewing Recently Used Tags

The **Tags** link and Recent Tags drop-down list, available in the sidebar, allow you to browse tags and access your most recently used tags, respectively.

- Click **Tags** to browse, search, and manage your entire tag collection.
- Select a tag in the Recent Tags drop-down list to view all records that have been marked with that tag. The tags that appear in this list are those you have most recently used to tag records.

Collaborate Within Salesforce

Update Your Contact Information

Update your contact information at any time on your profile page. Your contact information is visible to everybody in your company.

Available in: Salesforce Classic and Lightning Experience
Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Contact Manager**, and **Developer** Editions

To update your contact information, click your name or your profile picture. You can update all fields on your profile, except the Manager field. Only your Salesforce admin can update the Manager field.

In Communities, you can also control the visibility of your contact information within communities on a field-by-field basis. You can choose to expose fields to employees only, members of the community from outside your company, or guest users who aren't required to log in. Some fields are always visible to everyone accessing the community.

SEE ALSO:

[Change Your Profile or Group Photo](#)

Change Your Profile or Group Photo

Upload a photo to your profile so people can see who you are, or upload a photo for groups that you own or manage.

Available in: Salesforce Classic and Lightning Experience
Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Contact Manager**, and **Developer** Editions

1. Go to your profile or the group's page.
2. Hover over the photo and click **Add Photo** or **Update**.
3. Browse for the photo you want to upload and open the file. You can upload photos in .jpg, .gif, or .png format up to 8 MB.
4. Create a thumbnail image by dragging the dotted lines across the photo.

   If the photo is for your profile and you're a member of any communities, you can select `Show in communities with publicly accessible pages`. This option makes the photo visible to guest users viewing publicly accessible sites or pages that don't require login.

5. Save your changes.

Follow People

Follow people to see their updates in your feed, including posts, comments, and likes.

Available in: Salesforce Classic and Lightning Experience
Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Contact Manager**, and **Developer** Editions

To follow a person, click **Follow** on a person's profile page.

Once you follow people, you see their posts, comments, and likes in your feed. You can follow a maximum combined total of 500 people, topics, and records. To see how many items you're following, view the Following list on your profile.

To stop following a person, click ✖ . When you stop following a person, you don't see future updates from that person in your feed.

SEE ALSO:

[Follow Records](#)

Follow Records

Follow records so you can see updates in your feed, including field changes, posts, tasks, and comments on records.

Available in: Salesforce Classic and Lightning Experience
Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Contact Manager**, and **Developer** Editions

The field changes you see in your feed depend on which of the fields your administrator configured for feed tracking. Updates to encrypted custom fields don't display in feeds.

To follow a record, click **Follow** on the record page.

When you follow a record, you see updates to the record in your feed. You can follow a maximum combined total of 500 people, topics, and records. To see how many items you're following, view the Following list on your profile.

If you want to automatically follow the records you create, enable this feature from your personal settings. Enter `My Feeds` in the `Quick Find` box, select **My Feeds**, and then select **Automatically follow records I create**. However, you don't auto-follow events, tasks, or dashboards after you create them.

To stop following a record, click ✖ on the record page. After you stop following a record, you don't see future updates to the record in your feed.

SEE ALSO:

Follow People

Find Your Personal Settings

Join or Leave Groups

Join groups to collaborate with other people on projects or common areas of interest. Share project-related files and information with the group.

1. Go to group's detail page.

2. To join a public group, click **Join** or **Join Group**. To join a private group, click **Ask to Join**. Your request is sent to the private group's owner and managers, who accept or decline your request.

You can join up to 100 groups. All groups count toward this limit, except archived groups. For example, if you're a member of 100 groups, of which 10 are archived, you can join 10 more groups.

To leave a group you joined or withdraw your request to join a private group, go to the group detail page and click ✖ or **Leave Group**.

Search Across Your Feeds

Looking for people, groups, or files? Use search to quickly find information across your feeds.

IN THIS SECTION:

[Search Your Feeds in Lightning Experience](#)

Search for people, groups, and files across your feeds.

[Search Your Feeds in Salesforce Classic](#)

Search feeds, people, groups, topics, and files across Chatter.

Search Your Feeds in Lightning Experience

Search for people, groups, and files across your feeds.

1. Enter your search term in the header search box.

2. On the search result page, click **FEEDS** to see posts from the All Company feed that include matches on your search term.

Search Your Feeds in Salesforce Classic

Search feeds, people, groups, topics, and files across Chatter.

1. Enter your search term in the header search box.

2. Click **Search**.

   The search results page shows matches across Salesforce, including Chatter. From the search results page, you can further refine your search. For example, to see search results across all Chatter feeds, click **Search Feeds**.

You can also search specific feeds. For example, to find where is person is mentioned in a group, type the person's name in the search box above the group feed.

👁 **Example:** Watch a Demo: ▶ [Search in Salesforce Classic](#)

Use Salesforce on Mobile Devices

Salesforce1 Mobile App

The Salesforce1 mobile app is Salesforce on the go! This enterprise-class mobile experience gives you real-time access to the same information you see in the office, but organized for getting work done faster between customer meetings, waiting for a flight, even when you're in line for coffee. The intuitive interface makes it easy to navigate and interact with data on a touchscreen, so you can review and update information with just a few taps. And Salesforce1 includes many of your organization's customizations, so the app is tailored to your business needs.

> ✎ **Note:** This release of Salesforce1 doesn't have all of the functionality of the full Salesforce site. To see data or do actions that aren't supported in Salesforce1, use the full site instead.

Salesforce1 Mobile App Features: What's Available in Each Version
Salesforce1 is available as a downloadable app on iOS and Android devices, as well as browser-based app. In most cases the downloadable and mobile browser apps include the same features. But there are some differences between the experiences, often related to differences in the mobile platforms on which Salesforce1 is supported.

Requirements for the Salesforce1 Mobile App
Salesforce1 is available for most Salesforce editions and many user license types. The app is supported on a variety of mobile platforms, with some device, operating system, and mobile browser requirements. An Internet connection is necessary to communicate with Salesforce.

Data That's Available in the Salesforce1 Mobile App on page 187
Salesforce1 uses your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets to determine the data that's available to you. In most cases you see the same objects, record types, fields, and page layouts that you do when working in the full Salesforce site. Not all Salesforce data or functionality is supported in Salesforce1, however.

Get the Salesforce1 Mobile App
The way you access Salesforce1 depends on how you want to work: using an app installed on your device or using a mobile browser. It's possible that some of the Salesforce1 versions are disabled for your organization—ask your Salesforce administrator about your options.

Why Can't I Log in to the Salesforce1 Mobile App?
You're certain that you're using your correct Salesforce credentials but you can't log in to Salesforce1? There are several common reasons why you might be having trouble.

Find Help in the Salesforce1 Mobile App
Salesforce1 includes a **Help** link that you can use to learn about the mobile app.

SEE ALSO:

Help Resources for the Salesforce1 Mobile App

Help Resources for the Salesforce1 Mobile App

These resources provide information about using the Salesforce1 mobile app, setting up your organization to use the app, and developing for the app.

Getting Started with Salesforce1

Guides

Using the Salesforce1 App	PDF

Help Topics

Introduction to the Salesforce1 Mobile App	HTML
Salesforce1 Mobile App Features: What's Available in Each Version	HTML
Requirements for the Salesforce1 Mobile App	HTML
Data That's Available in the Salesforce1 Mobile App	HTML
Get the Salesforce1 Mobile App	HTML
Salesforce1 Limits and Differences from the Full Salesforce Site	HTML

Help in the App

For the Salesforce1 Downloadable App on iPhone	HTML
For the Salesforce1 Downloadable App on iPad	HTML
For the Salesforce1 Downloadable App on Android Phones	HTML
For the Salesforce1 Mobile Browser App on Mobile Phones	HTML
For the Salesforce1 Mobile Browser App on Tablets	HTML

Salesforce1 Videos

Take Your Tasks from Desktop to Mobile	Video
Accounts and Contacts on the Go	Video

Setting Up and Customizing Salesforce1

Guides and Cheat Sheets

Salesforce1 Section in the Salesforce Winter '16 Release Notes	PDF	HTML
Salesforce1 Mobile App Admin Guide	PDF	HTML
Salesforce1 App Admin Rollout Guide		HTML
Salesforce1 Admin Cheat Sheet	PDF	

Help Topics

Set Up the Salesforce1 Mobile App with the Salesforce1 Wizard	HTML
Salesforce1 Mobile App Setup Considerations	HTML
How Actions Are Ordered in the Salesforce1 Action Bar and List Item Actions	HTML

Custom Branding for the Salesforce1 Mobile App	HTML
Enable Visualforce Pages for the Salesforce1 Mobile App	HTML
Salesforce1 Mobile App Offline Access	HTML

Developing for Salesforce1

Guides and Cheat Sheets

Salesforce1 Developer Cheat Sheet	PDF	
Salesforce1 App Developer Guide	PDF	HTML
Salesforce1 Mobile URL Schemes for Android and iOS	PDF	
Salesforce1 Mobile Security Guide	PDF	

Salesforce1 Mobile App Features: What's Available in Each Version

Salesforce1 is available as a downloadable app on iOS and Android devices, as well as browser-based app. In most cases the downloadable and mobile browser apps include the same features. But there are some differences between the experiences, often related to differences in the mobile platforms on which Salesforce1 is supported.

Feature	iOS and Android Downloadable Apps (v7.x)	Mobile Browser App
Navigation and Actions		
Access up to 200 list views per object	✔	✔
See visual snapshots of business data on list view charts		✔ *(tablets only)*
Sort and filter list views	✔	✔
Do actions like make phone calls, log calls, send emails, map locations, and view news or Websites *(Phone calls supported on iPhones and Android phones only)*	✔	✔
Use quick actions created for your organization	✔	✔
Search		
Search for Salesforce records	✔	✔
Scope global searches to find records by object		✔
See matching search results for all records, not just those that have been recently viewed		✔

Feature	iOS and Android Downloadable Apps (v7.x)	Mobile Browser App
Sort search results		✔
Relationship and Data Management		
Add new records and update existing records	✔	✔
Prevent the creation of duplicate records	✔	✔
Add contacts to Salesforce from mobile device contact lists	✔	
Locate, associate, and view Twitter profiles for Salesforce accounts, contacts, and leads	✔	✔
Work with data stored outside of Salesforce	✔ *(iOS only)*	✔
Sales Productivity		
Take rich text meeting notes and easily relate them to records	✔	✔
Track the latest news about accounts	✔	✔
Convert qualified leads to contacts	✔	✔
Use Sales Path to follow sales processes and get deals closed	✔	✔
Salesforce Today and Activities		
Use Today to prepare for and manage the day's events, join conference calls, and log mobile calendar events in Salesforce	✔	
Add contacts to Salesforce from events in Today	✔	
Create tasks from Chatter posts		✔
Create tasks from Notes	✔	✔
Track, close, or reopen tasks	✔	✔
Do quick task updates with a tap: edit comments or change a due date, status, or priority	✔	✔
Create and view Salesforce events	✔	✔
Work.com		
Use Work.com Coaching, Goals, Rewards, and Skills	✔ *(Skills in Android only)*	✔
Customer Service Tools		
Use Social Customer Service to track cases and respond to Twitter Tweets in real time	✔	✔

Feature	iOS and Android Downloadable Apps (v7.x)	Mobile Browser App
View Salesforce Knowledge articles		✔
Salesforce1 Reporting		
View dashboards, dashboard components (including Visualforce dashboard components), and reports	✔	✔
Sort data in reports	✔	✔
Apply dashboard filters	✔	✔
Share dashboards in feeds *(iOS only, limited)*	✔	✔
Chatter (Feeds, Profiles, Groups, Files		
Use Chatter feeds, people, and groups	✔	✔
Search in the main Chatter feed	✔	✔
View, edit, and follow feed entries organized by topic; add multiple topics to posts		✔
Bundle multiple record updates into a single post		✔
Attach photos or files to posts or comments, or use quick actions to post photos or files	✔	✔
Share Chatter posts	✔	
See previews of files posted to posts and comments	✔	✔
Double-tap to add or remove bookmarks for Chatter posts	✔	
Ask questions and get answers in the feed		✔
Escalate questions in Chatter to cases		✔
Edit user profile details *(Android only)*	✔	✔
Change the user profile picture	✔	✔
Add records to groups	✔	✔
Collaborate with more privacy in unlisted Chatter groups	✔	✔
Post announcements in group feeds	✔	✔
Manage groups	✔	✔
Use Salesforce Files (*Requires Chatter*)	✔	✔

Feature	iOS and Android Downloadable Apps (v7.x)	Mobile Browser App
Browse and share files from external data sources, such as SharePoint or OneDrive for Business (*Requires Files Connect*)		✔
Use Salesforce1 if Chatter is turned off	✔	✔
Use quick actions in Salesforce1 if Chatter is turned off	✔	✔
Launch Salesforce1 from Chatter email notifications and digest links	✔	✔
Business Logic and Process Automation		
Submit records for approval	✔	✔
View the status of pending approvals and approve or reject approval requests	✔ (*iOS only*)	✔
Resume or delete paused flow interviews		✔
Notifications		
Receive in-app notifications	✔	✔
Receive push notifications	✔	
Configure the push notifications that are sent	✔	
Offline		
View cached data when working offline	✔	
Access		
Access communities created using the Salesforce Tabs + Visualforce template	✔	✔
Switch between multiple Salesforce accounts or communities without leaving the app	✔	
Open most Salesforce URLs directly in Salesforce1	✔ (*iOS only*)	
Configure connections to multiple instances from the login page	✔	
Control app access with a security PIN	✔	
Customizations and User/App Settings		
View Visualforce pages	✔	✔
Access Lightning pages, and custom and third-party apps	✔	✔
See a customized selection and arrangement of actions in the action bar and list item actions	✔	✔

Feature	iOS and Android Downloadable Apps (v7.x)	Mobile Browser App
See custom branding	✔	✔

SEE ALSO:

Help Resources for the Salesforce1 Mobile App

Requirements for the Salesforce1 Mobile App

Salesforce1 is available for most Salesforce editions and many user license types. The app is supported on a variety of mobile platforms, with some device, operating system, and mobile browser requirements. An Internet connection is necessary to communicate with Salesforce.

Supported Devices and Browsers

Salesforce1 is supported in portrait orientation in these environments.

Salesforce1 App	Supported Devices	Supported Mobile OS	Supported Mobile Browser
Downloadable app for iOS, v7.3 or later	iPhone 5 or later models iPad 4 or later models (including iPad Air 2 and iPad Pro) iPad mini 2 or later models Apple Watch (*push notifications only*)	iOS 8 or later	Not applicable
Downloadable app for Android, v7.3 or later	Android phones	Android 4.2 or later	Not applicable
Mobile browser app	iPhone 5 or later models iPad 4 or later models iPad mini 2 or later models	iOS 8 or later	Apple Safari Good Access
	Android phones Android tablets	Android 4.4 or later	Google Chrome Good Access
	Nokia Lumia 1020 and HTC 8X phones	Windows 8.1 Update	Microsoft Internet Explorer 11
	BlackBerry Z10 phones	BlackBerry OS 10.2 or later	BlackBerry Browser

Salesforce1 App	Supported Devices	Supported Mobile OS	Supported Mobile Browser
	BlackBerry Z30 phones	BlackBerry OS 10.2.1.3175 or later	BlackBerry Browser

For optimal Salesforce1 performance, we recommend keeping your mobile devices' operating systems updated and upgrading to late model devices as allowed by your mobile plan. Future Salesforce1 versions may require removing support for older operating systems and sometimes newer operating system releases don't perform well on older devices.

When using the mobile browser app, we recommend turning off Incognito Mode in Chrome, InPrivate Browsing in Internet Explorer, or Private Browsing in Safari or BlackBerry Browser.

Salesforce Editions and Licenses

These Salesforce editions and user license types allow the use of Salesforce1.

Salesforce Editions		
These Salesforce editions allow the use of Salesforce1.	- Personal Edition - Group Edition - Professional Edition - Enterprise Edition - Performance Edition - Unlimited Edition - Developer Edition - Contact Manager Edition	Database.com Edition isn't supported.
User License Types		
These user license types can access Salesforce1. A special Salesforce1 or mobile license isn't required.	- Salesforce users - Salesforce Platform and Force.com users - Chatter Plus users (also known as Chatter Only), Chatter Free users, and Chatter External users[*] - Customer Community, Customer Community Plus, and Partner Community external users - Portal users who are a member of a Salesforce community	These user license types aren't supported: portal users (unless a member of a Salesforce community), Database.com users, Sites and Site.com users, Data.com users, and Work.com users.

📝 **Note:** You can access the same data and functionality that's available to you in the full site, as determined by your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets.

[*]Chatter Plus, Chatter Free, and Chatter External users must have the "API Enabled" profile permission turned on to use any of the Salesforce1 downloadable apps. Chatter External users who have API access can't access Groups or People list views when using a downloadable app.

Wireless Connection

A Wi-Fi® or cellular network connection is needed to communicate with Salesforce. For cellular connections, a 3G network or faster is required. For the best performance, we recommend using Wi-Fi or LTE.

If you're using one of the Salesforce1 downloadable apps, you can view your most recently accessed records when your device is offline.

SEE ALSO:

Locale and Language Support for the Salesforce1 App

Salesforce1 Mobile App Accessibility Considerations

Data That's Available in the Salesforce1 Mobile App

Locale and Language Support for the Salesforce1 App

Salesforce1 works with almost all Salesforce-supported locales and the fully supported and end-user languages. (The Salesforce Help includes a complete list of supported locales and languages.) Languages that are read right to left, including Arabic and Hebrew, aren't supported in this release.

> **Note:** The Salesforce1 downloadable apps use the language and locale settings from both your Salesforce user profile and the locale settings on your mobile device. If your device uses different locale settings than are specified for your user profile, you may see different languages displayed throughout the app. For example, the navigation menu might display in English while records display in French.

Salesforce1 includes multi-currency support, but advanced currency management isn't available.

EDITIONS

Salesforce1 available in: **All** editions except Database.com

SEE ALSO:

Requirements for the Salesforce1 Mobile App

Salesforce1 Mobile App Accessibility Considerations

Salesforce1 is designed with accessibility in mind and delivers a fully-accessible mobile experience for all individuals, including users working with screen readers.

Unlike the full Salesforce site, Salesforce1 doesn't require accessibility mode to give users working with assistive devices a fully accessible experience.

Check your mobile device's documentation for more information about using a screen reader.

EDITIONS

Salesforce1 available in: **All** editions except Database.com

SEE ALSO:

Requirements for the Salesforce1 Mobile App

Data That's Available in the Salesforce1 Mobile App

Salesforce1 uses your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets to determine the data that's available to you. In most cases you see the same objects, record types, fields, and page layouts that you do when working in the full Salesforce site. Not all Salesforce data or functionality is supported in Salesforce1, however.

EDITIONS

Salesforce1 available in: **All** editions except Database.com

These objects are available in Salesforce1. Unless noted otherwise, you can view, edit, or create records for these objects.

- Accounts and Person Accounts
- Campaigns
- Cases
- Contacts
- Contracts
- D&B Company (*view only, for Data.com Premium Prospector and Data.com Premium Clean customers)*
- Dashboards (*view only*)
- Events
- Leads
- Live Chat Transcripts
- Opportunities
- Orders (*view or edit only*)
- Reports (*view only*)
- Salesforce Knowledge Articles (*view only; mobile browser app only*)
- Tasks
- Work.com Coaching, Goals, Thanks, Rewards, and Skills (*Skills not available in the iOS downloadable app*)
- External objects via Lightning Connect (*view only; not available in the Android downloadable app*)
- Custom objects that have a tab you can access

You can access all of these objects from the Salesforce1 navigation menu. The navigation menu helps you focus on the objects you work with most frequently. Tap **More** at the bottom of the Recent section to see the full list of all objects available to you in Salesforce1.

With some exceptions, all of the standard and custom fields are available on these records. And you can work with most of the related lists for supported objects.

> 💡 Tip: If you're new to Salesforce and don't yet have a history of recent items, you initially see these objects in the Recent section of the Salesforce1 navigation menu: Accounts, Cases, Contacts, Files, Groups (unless added directly to the navigation menu), Leads, Opportunities, and People (unless added directly to the navigation menu).
>
> As you spend time working in Salesforce1 and the full Salesforce site, the objects that you use the most eventually replace the default ones in the Recent section and become the objects that are available for global searches in Salesforce1.
>
> It can take up to 15 days for the objects that you work with regularly to appear in the Recent section. To make objects appear under Recent immediately, pin them from your search results in the full site.
>
> When doing a global search in Salesforce1, you can find records for the objects that appear in the Recent section only. To find records for the other objects that are in the full object list when the Recent section is expanded, search from the object's home page.

If Chatter is enabled, you can access feeds, user profiles, groups, and files. You can access user profiles even if Chatter is disabled.

If you're using a Salesforce1 downloadable app, you can use Salesforce Today to prepare for meetings, stay in touch with customers, quickly join conference calls, and generally manage your day.

SEE ALSO:

Requirements for the Salesforce1 Mobile App

Get the Salesforce1 Mobile App

The way you access Salesforce1 depends on how you want to work: using an app installed on your device or using a mobile browser. It's possible that some of the Salesforce1 versions are disabled for your organization—ask your Salesforce administrator about your options.

Install a Downloadable App

Salesforce1 downloadable apps are available for Android phones and iPad and iPhone devices. You can download and install the app from Google Play or the App Store.

You can download and install the Salesforce1 downloadable apps from Google Play or the App Store to supported Android and iOS devices.

Once the app is installed, launch it from your home screen and log in to your Salesforce account. You may be prompted to create a security PIN. By default, you're connected to your production environment.

📝 **Note:** If you're not able to log in, verify with your administrator that you're enabled to use the downloadable app.

Use the Mobile Browser App

The Salesforce1 mobile browser app runs in a mobile browser. The mobile browser app is a great option if your organization prevents installing apps on your corporate-issued device.

If the mobile browser app is enabled for your organization, you're automatically redirected to Salesforce1 when you log in to Salesforce from a supported mobile browser.

If Salesforce1 doesn't automatically start for you, make sure you didn't turn off the redirection to the mobile browser app and that you're using a supported browser.

SEE ALSO:

Why Can't I Log in to the Salesforce1 Mobile App?

Requirements for the Salesforce1 Mobile App

Turn the Salesforce1 Mobile Browser App Off or On

EDITIONS
Salesforce1 available in: **All** editions except Database.com

Why Can't I Log in to the Salesforce1 Mobile App?

You're certain that you're using your correct Salesforce credentials but you can't log in to Salesforce1? There are several common reasons why you might be having trouble.

- Make sure that you actually have permission to use Salesforce1. Salesforce administrators can control who's able to use the Salesforce1 downloadable apps and can also disable access to the mobile browser app, for you or your entire company. If you're not sure that you have access, check with your administrator.

- If you're using a downloadable app, make sure you're logging in to the correct instance—production, sandbox, or a custom domain. By default, Salesforce1 connects to your production environment. If your organization uses single sign-on, configure the app to point to a different page during login. The same is true to connect Salesforce1 to a sandbox environment for testing purposes or to log in using a Community URL.

  A custom domain is in the form of `https://universalcontainers.my.salesforce.com`, where `universalcontainers` is a name selected by your administrator. Your administrator can provide you with the domain name to use.

  - To connect the downloadable app for iOS to a different instance, use these steps.
  - To connect the downloadable app for Android to a different instance, use these steps.

EDITIONS
Salesforce1 available in: **All** editions except Database.com

If you're still unable to log in, ask your administrator for help.

SEE ALSO:
>   Get the Salesforce1 Mobile App
>   Requirements for the Salesforce1 Mobile App

Find Help in the Salesforce1 Mobile App

Salesforce1 includes a **Help** link that you can use to learn about the mobile app.

The **Help** link is located at the bottom of the Salesforce1 navigation menu. Tap ☰ to open the navigation menu.

And there are a lot of other resources that can help you get started with Salesforce1. Check out Help Resources for the Salesforce1 Mobile App on page 179.

Turn the Salesforce1 Mobile Browser App Off or On

When the Salesforce1 mobile browser app is enabled for your organization, you automatically redirect to this experience when you log in to Salesforce from a supported mobile browser. Using the full Salesforce site in a mobile browser isn't supported. But it is possible to turn off the mobile browser app if you need to access Salesforce Classic from your mobile device for awhile.

> 📝 Note: If you disable automatic redirection to the Salesforce1 mobile browser app, you're turning off automatic access for any supported browser, on any of your mobile devices. For example, if you turn off the mobile browser app from your tablet, you won't be able to use the mobile browser app on your mobile phone either.
>
> These steps don't affect the Salesforce1 downloadable apps which always display the Salesforce1 interface.

To turn off the mobile browser app from within the app:

1. Tap ☰ .
2. Tap **Full Site**.

You switch immediately to the Salesforce Classic full site. It's not possible to access Lightning Experience from any mobile browser.

The full site is now your default environment whenever you log in from a mobile browser. You can switch back to the Salesforce1 app using the **Go to Salesforce1** link in the full site footer, after which the mobile browser app becomes your new default environment.

To turn off the mobile browser app from the full site:

1. From your personal settings, enter `Advanced User Details` in the `Quick Find` box, then select **Advanced User Details**. No results? Enter `Personal Information` in the `Quick Find` box, then select **Personal Information**.
2. Deselect `Salesforce1 User`.
3. Save your changes.

To turn the Salesforce1 mobile browser app back on from the full site, repeat the previous steps and select the `Salesforce1 User` checkbox.

SEE ALSO:
> [Get the Salesforce1 Mobile App](#)
> [Requirements for the Salesforce1 Mobile App](#)
> [Find Your Personal Settings](#)

Get Started With Chatter Mobile for BlackBerry

Chatter Mobile for BlackBerry Overview

🛑 **Important:** As of Summer '14, the Chatter Mobile for BlackBerry app is no longer supported. You can continue to use the app, but Salesforce no longer provides support in the form of bug fixes or enhancements for any issues you may encounter. Talk to your Salesforce administrator about migrating to the Salesforce1 app, the new Salesforce mobile experience.

The Chatter Mobile for BlackBerry app lets you collaborate in Chatter from your mobile device as follows:

- Receive updates about the people and records you follow and your groups.

- View and create posts and comments.

- Post photos from your device.

- Find and follow people in your organization.

- Find and join groups in your organization.

- View your coworkers' profiles to see their contact information, bio, who they're following, and who's following them.

- Email, call, or text people directly from their Chatter profiles.

EDITIONS
Available in: Salesforce Classic
Available in:
• Group
• Professional
• Enterprise
• Performance
• Unlimited
• Contact Manager
• Developer
• Database.com

Chatter Mobile for BlackBerry is free and available for BlackBerry devices with OS 5 or later. Download the app from BlackBerry World. Customers that manage BlackBerry devices with a BlackBerry Enterprise Server can use Application Push to remotely deliver the Chatter Mobile for BlackBerry app to users. Navigate to `downloads.salesforce.com` and click **BESpush** under Chatter Files and Tools to download the Application Push package.

Chatter Mobile for BlackBerry is enabled for use in most organizations by default. If it is not enabled in your organization or you want to change the default settings, contact your administrator.

What are push notifications? How do I enable or disable them for Chatter Mobile for BlackBerry?

Push notifications are alerts that apps send to your mobile device's home screen when you're not using the app. These alerts can consist of text, icons, and sounds, depending on your device type. The Chatter Mobile for BlackBerry mobile app uses push notifications to keep you aware of important Chatter activity without requiring you to return to the app. A setting controls whether or not you receive Chatter push notifications; however, you can't enable push notifications if they were disabled by your administrator.

To learn about enabling or disabling push notifications, visit the Chatter mobile app help site from your device.

Can Chatter customers from Customer Groups use Chatter Mobile for BlackBerry?

Chatter customers can download the Chatter Mobile for BlackBerry mobile app to use Chatter from their BlackBerry device. Chatter Mobile for BlackBerry applies the same restrictions to customer users as Chatter on the Web.

Chatter Customers are users outside of your company's email domains, who have access to private groups with customers. In Chatter Mobile for BlackBerry, the names and profiles of customer users can be viewed by people inside your company's domain.

Get Started With Salesforce Classic

Salesforce Classic Mobile Overview

The Salesforce Classic Mobile app provides mobile access to your Salesforce data from Android™, BlackBerry® and iPhone® devices. If you have a license to use the full version of Salesforce Classic Mobile, you can view, create, edit, and delete records, keep track of your activities, view your dashboards, run simple reports, and log calls and emails. Any Salesforce user who doesn't have a mobile license can download a free, restricted version of Salesforce Classic Mobile. With the free version, you can view, create, edit, and delete only accounts, assets, contacts, leads, opportunities, events, tasks, cases, and solutions. You can also access your dashboards.

> 📝 Note: Supported features may vary depending on your mobile operating system and device model.

Salesforce Classic Mobile stores your Salesforce records in a local database on your mobile device, which means you can use the Salesforce Classic Mobile app even when a data connection is unavailable. Salesforce Classic Mobile periodically polls Salesforce for new and updated records, saving you from the hassle of manually synchronizing your data.

In the free version of Salesforce Classic Mobile, only records you recently accessed in Salesforce automatically synchronize to your device. However, you can search for and download records that are not automatically delivered to your device. Items you download from Salesforce become a permanent part of your mobile data set. In addition to recently accessed records, the default configuration synchronizes activities closed in the past five days and open activities due in the next 30 days.

Check the list of supported mobile devices to see if you can use the Salesforce Classic Mobile app on your smartphone.

EDITIONS
Available in: both Salesforce Classic and Lightning Experience
Free version available in: **All** editions except **Database.com**
Full version available in: **Performance**, **Unlimited**, and **Developer** Editions, and for an extra cost in: **Professional** and **Enterprise** Editions

SEE ALSO:

> Salesforce Classic Implementation Guide
>
> Salesforce Classic User Guide for BlackBerry
>
> Salesforce Classic User Guide for iPhone

Requirements for Using Salesforce Classic Mobile

The Salesforce Classic Mobile app can run on Android, BlackBerry, and iOS operating systems. It's also supported by wireless carriers—if the device can establish a data connection to the Internet, it can typically run the mobile app. Verify that your device is supported before installing the mobile app. Recently released mobile devices aren't immediately supported because every device goes through the official certification and quality assurance process.

Notes About BlackBerry Smartphones

- Even if your device meets the minimum operating system requirement, you can improve its performance by upgrading to the latest supported version of the operating system offered by your mobile carrier.

- Mobile users running versions 4.0 - 4.3 of the BlackBerry operating system can still download and install the Salesforce Classic Mobile app; however, the mobile server will detect the older operating system and send version 11.6 of Salesforce Classic Mobile, which was the last release that supported BlackBerry operating system versions 4.0 - 4.3. Users on version 11.6 of Salesforce Classic Mobile can't use any of the new features included in the current release or future releases.

- Starting in Winter '09, Salesforce Classic Mobile no longer officially supports the BlackBerry 8700 series, although the mobile app may continue to run on those device models.

- BlackBerry touchscreen devices use the same Salesforce Classic Mobile app as other BlackBerry devices, so some aspects of Salesforce Classic Mobile aren't optimized for the touchscreen interface.

Notes About iOS Devices

Use of the Salesforce Classic Mobile app for Apple products is subject to certain limitations:

- Third parties (including, but not limited to, Apple Inc. and your network connectivity provider) may at any time restrict, interrupt or prevent use of Salesforce Classic Mobile for the iPhone and iPod touch devices, or delete the Salesforce Classic Mobile app from iPhone or iPod touch devices, or require Salesforce to do any of the foregoing, without entitling the customer to any refund, credit or other compensation from such third-party or Salesforce.

- Service level agreements don't apply to the Salesforce Classic Mobile for iPhone product. Additional limitations are described in the Order Form Supplement for Salesforce Classic Mobile for iPhone, which users are required to accept upon download or installation of the Salesforce Classic Mobile for iPhone product.

SEE ALSO:

Salesforce Mobile Products Overview

Salesforce Classic Mobile Overview

Installing the Salesforce Classic Mobile App

You can install the Salesforce Classic Mobile app on any supported Android, BlackBerry, or iPhone device.

The easiest way to install Salesforce Classic Mobile is to visit `http://mobile.salesforce.com` from your mobile device and follow the on-screen instructions.

Or, you can use the installation steps for your type of device:

Android Installation

Salesforce Classic Mobile is available for download from Google Play. To access Google Play, your Android device must be connected to the network. You also need a Google account to download applications. If you don't already have a Google account, go to `https://accounts.google.com` and select **Sign up** to set one up.

To install Salesforce Classic Mobile from Google Play:

1. From the Apps screen of your Android device, select the Google Play Store.

2. Select the **Search** field, and type `salesforce`.

3. Select Salesforce Classic Mobile from the search results.

4. Select **Download**.

5. Tap **Accept and Download** if you agree to the terms.

6. Select **Open** to launch the application.

7. The first time you launch the Salesforce Classic Mobile app on your device, you must activate the app for your device by logging in and downloading data. Verify that your phone is connected to a network.

   a. Select **I Accept**.

   b. On the activation screen, enter your Salesforce username and password.

   c. Select **Activate**.

Depending on your organization's setup, you might need to set up a passcode before accessing the app.

BlackBerry Installation

Salesforce Classic Mobile is available for download from BlackBerry World. You need a BlackBerry World account to download apps on your BlackBerry, but you can create an account from your device if you don't already have one. To install Salesforce Classic Mobile from BlackBerry World:

1. Select the BlackBerry World icon.

   If you can't find the icon on your device, you might need to download BlackBerry World. BlackBerry World can't run on all BlackBerry smartphones, so be sure to review Research in Motion's system requirements before trying to install BlackBerry World on your device.

2. Select the **Search** icon.

3. Enter `salesforce` in the `Search` field.

4. In the search results, select Salesforce Classic Mobile.

5. Click **Download**.

6. After the installation completes, select **OK**.

7. When prompted whether to permit the app to access the phone, select **Allow**.

8. When prompted whether to permit the app to access tp.mobile.salesforce.com, select **Yes**.

9. Close BlackBerry World.

10. Select the app icon, which resides on the home page of your device or in the Applications folder. On newer phones, the icon may be in the Downloads folder.

11. The first time you launch the Salesforce Classic Mobile app on your device, you must activate the app for your device by logging in and downloading data. Verify that your device is connected to a network.

    a. Read the license agreement and select **I Accept**.

    b. Enter your Salesforce username and password.

       Because many passwords contain special characters that are difficult to enter on the device, the `Show Password` checkbox is selected by default. To protect your password, you can deselect the option.

    c. Select **Activate**.

       After your username and password are confirmed by Salesforce, the data downloads. The initial data download may last a few minutes. Future updates to the data occur automatically.

Depending on your organization's setup, you might need to set up a passcode before accessing the app.

> **Note:** If you're unable to download the Salesforce Classic Mobile app from BlackBerry World, you can install the app over-the-air directly from Salesforce instead.

iPhone Installation

Salesforce Classic Mobile is available for download from Apple's App Store. To use the App Store, your iPhone or iPod touch must be connected to the network. You also need an iTunes™ Store account to download applications. If you don't already have an iTunes Store account, open iTunes on your computer and select **Store** > **Account** to set one up.

To install Salesforce Classic Mobile from the App Store:

1. From the Home screen of your iPhone or iPod touch, select the App Store icon.

2. Tap **Search**.

3. Tap within the `Search` field to open the keyboard. Type *salesforce*.

4. Select Salesforce Classic Mobile in the list of search results to view information about the application.

5. Tap **Free**, and then tap **Install**.

   > **Note:** There's no charge to download the app from the App Store. Enterprise, Professional, Unlimited, Performance, and Developer Edition users with mobile licenses run the full version of Salesforce Classic Mobile. Any Salesforce user who doesn't have a mobile license can download a free, restricted version of Salesforce Classic Mobile.

6. Enter your iTunes Store account and password and tap **OK**.

7. The first time you launch Salesforce Classic Mobile, you must activate the app for your device by logging in and downloading data. Verify that your device is connected to a network.

    a. Tap the Salesforce icon on the Home screen.

    b. Tap **I Accept**.

    c. On the activation screen, enter your Salesforce username and password.

    d. Tap **Activate**.

> ⚠️ **Warning:** If the application closes or the device locks during the activation process, the iPhone operating system pauses the download process but it will resume the next time you open the app.

Depending on your organization's setup, you might need to set up a passcode before accessing the app.

SEE ALSO:

Salesforce Classic Implementation Guide

Salesforce Classic User Guide for BlackBerry

Salesforce Classic User Guide for iPhone

Salesforce Mobile Products Overview

Salesforce Classic Mobile Overview

Downloading Salesforce Classic Mobile Over-the-Air from Salesforce

The BlackBerry World is the preferred place for downloading the Salesforce Classic Mobile app because users are automatically notified as upgrades become available. However, some BlackBerry administrators restrict users from downloading and using the BlackBerry World on their devices. BlackBerry users can install Salesforce Classic Mobile over-the-air directly from Salesforce if they are unable to access BlackBerry World.

To download Salesforce Classic Mobile over-the-air:

1. Point your mobile browser to `mobile.salesforce.com/bb`.

2. Highlight the **Download the application** link and select **Get Link** from the menu.

3. Select **Download**. If prompted to replace an older version of the client application, select **Yes**.

   > 📝 **Note:** The minimum BlackBerry operating system requirement for the mobile application is 4.3. If you're running versions 4.0–4.3 of the operating system, you can still download and install the mobile application; however, the mobile server will detect the older operating system and send version 11.6 of the mobile application, which was the last release that supported operating system versions 4.0–4.3. You can't use any of the new features included in the current release or future releases until you upgrade to the most recent BlackBerry operating system for your phone.

4. Select **Reboot** to restart your device.

5. When prompted to allow an HTTP connection, select the `tp.mobile.salesforce.com` checkbox. Scroll down and select **Allow this connection**.

6. Select the Salesforce Classic Mobile icon, which resides on the home page of your device or in the Applications folder. On newer phones, the icon may be in the Downloads folder.

7. Read the license agreement and select **I Accept**.

8. Enter your Salesforce username and password.

   Because many passwords contain special characters that are difficult to enter on the device, the `Show Password` checkbox is selected by default. To protect your password, you can deselect the option.

9. Select **Activate**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Free version available in: **All** editions except **Database.com**

Full version available in: **Performance**, **Unlimited**, and **Developer** Editions, and for an extra cost in: **Professional** and **Enterprise** Editions

After your username and password are confirmed by Salesforce, the data downloads. The initial data download may last a few minutes. Future updates to the data automatically occur behind the scenes.

SEE ALSO:

[Salesforce Mobile Products Overview](#)

[Salesforce Classic Mobile Overview](#)

Mobile FAQ

Using Salesforce Classic Mobile FAQ

- [Do I need a license to use Salesforce Classic Mobile?](#)
- [Is my phone compatible with the Salesforce Classic Mobile app?](#)
- [What Salesforce data is stored on my device when I use the Salesforce Classic Mobile app?](#)
- [How do I use the Salesforce Classic Mobile app to access records that aren't on my mobile device?](#)
- [How frequently does the Salesforce Classic Mobile app update my data?](#)
- [Can I see records in the Salesforce Classic Mobile app that I can't access in Salesforce?](#)
- [When I receive a call on my mobile device, will the Salesforce Classic Mobile app open the associated contact record?](#)

Do I need a license to use Salesforce Classic Mobile?

You need a mobile license to use the full version of Salesforce Classic Mobile. Any Salesforce user who doesn't have a mobile license can download a free, restricted version of Salesforce Classic Mobile.

With the free version, you can view, create, edit, and delete only accounts, assets, contacts, leads, opportunities, events, tasks, cases, and solutions. You can also access your dashboards.The free version synchronizes records you recently accessed on the Salesforce website, and you can search for records that were not automatically downloaded to your device. Starting with Summer '13, the free version of Salesforce Classic Mobile is disabled by default in all new organizations. You can enable it to give users access to Salesforce on their mobile devices.

If you've been assigned a mobile license but your administrator hasn't set up your mobile configuration yet, you can activate Salesforce Classic Mobile with the default mobile configuration. The default configuration automatically synchronizes the records you most recently accessed in Salesforce to your mobile device. You can also search for and download any records from Salesforce that aren't available locally on your device.

To find out if your user account has been assigned a mobile license to access the full version of Salesforce Classic Mobile, review your personal setup.

- If the **Mobile User** checkbox is selected, you can install and run Salesforce Classic Mobile. If the **Mobile User** checkbox is selected but the `Mobile Configuration` field is blank, you can activate Salesforce Classic Mobile using the default mobile configuration.
- If the **Mobile User** checkbox isn't selected and you're an Enterprise, Professional, Unlimited, Performance, or Developer Edition customer, you may have access to the free version of Salesforce Classic Mobile. Ask your administrator whether you have access to the free version of Salesforce Classic Mobile.

> Note: The `Mobile User` checkbox is disabled by default for new Unlimited and Performance Edition users.

Is my phone compatible with the Salesforce Classic Mobile app?

The Salesforce Classic Mobile app can run on iPhones, iPod touch devices, and most BlackBerry and Android devices. To find out if your phone can run the app, see the list of supported mobile devices.

📝 **Note:** Supported features may vary depending on your mobile operating system and device model.

What Salesforce data is stored on my device when I use the Salesforce Classic Mobile app?

Using the Salesforce Classic Mobile app to access Salesforce on a mobile device is much different from using the full Salesforce application on your computer. Mobile devices have a minimal amount of memory and a small screen, and don't always maintain a constant network connection. To work with these limitations, a subset of your Salesforce data is stored in a local database on your phone.

The following types of tabs are available in the Salesforce Classic Mobile app:

- All custom object tabs and these standard object tabs:
    - Accounts
    - Assets
    - Attachments
    - Cases
    - Contacts
    - Content
    - Events
    - Groups
    - Group Members
    - Leads
    - Notes
    - Opportunities
    - Price Books
    - Products
    - Solutions
    - Tasks
    - Users
    - Dashboards
    - Reports

- Web and Visualforce tabs

    📝 **Note:** The tabs and objects that you see in the app are determined by your mobile configuration and might not include all the tabs and objects listed here.

    Additionally, the iPhone and Android apps don't support reports.

When you open the tab for an object, you probably won't see all of your Salesforce records. For each mobilized object, your administrator can create filter criteria to limit the number of records on your device. For example, in a large organization, sending all open and closed opportunities to your mobile device could consume too much memory or potentially crash it. Instead of sending all opportunities, your administrator might send a subset of them, such as open opportunities that you own that are scheduled to close this month.

Can I see records in the Salesforce Classic Mobile app that I can't access in Salesforce?

No. User permissions, sharing rules, and field-level security are inherited from Salesforce—the mobile application enforces all the restrictions set up in Salesforce.

How frequently does the Salesforce Classic Mobile app update my data?

The Salesforce Classic Mobile app checks for data changes every 20 minutes. During this incremental update, the server retrieves any newly created Salesforce records that you own, and then sends that data to your device. It also sends modifications to any records already stored on the device.

> **Note:** Note the following about data synchronization:
>
> - The Android and BlackBerry client apps adjust their data polling time based on app usage. If the app isn't in use, the polling time interval increases in an exponential fashion, until it reaches eight hours. From that point forward, the device polls for data every eight hours. This prevents the Salesforce Classic Mobile app from draining the device battery when the app is rarely used.
> - Because only one app can run on the iPhone at a time, the Salesforce Classic Mobile app can't request a data update unless the app is open. When you launch the app on the iPhone, it performs an incremental update unless a data synchronization has occurred in the past 20 minutes.

How do I use the Salesforce Classic Mobile app to access records that aren't on my mobile device?

The Salesforce data available on your device is defined by your mobile configuration. You can easily search for records that aren't automatically downloaded to your device. A search box is available on each object tab in the Salesforce Classic Mobile app, as well as on the app's home page.

When I receive a call on my mobile device, will the Salesforce Classic Mobile app open the associated contact record?

The Salesforce Classic Mobile app can't open a Salesforce contact when you receive incoming calls. However, if you place a call from Salesforce Classic Mobile, you're automatically prompted to log the call.

Get Additional Help

Tip Sheets and Implementation Guides

In addition to online help, Salesforce publishes additional material to help you be successful with Salesforce. These documents include tip sheets, implementation guides, and other resources that describe the features and capabilities of Salesforce.

> **Note:** Adobe Reader® is required to open Adobe® PDF files. To download the latest version of Reader, go to
> `www.adobe.com/products/acrobat/readstep2.html`.

- For All Users
- For Sales Professionals
- For Support Professionals
- For Marketing Professionals
- For Analytics Cloud Professionals

- For Administrators

SEE ALSO:

Video Demos

For All Users

These documents are for all Salesforce users.

- *How to be Successful with Salesforce*
- *Tips & Hints for Custom Views*
- *Salesforce System Requirements*
- *Tips for Using Content Deliveries*
- *Using Salesforce Group Edition*
- *Chatter Plus Frequently Asked Questions*

Reports and Dashboards

- *Getting Started with Salesforce Reports and Dashboards*
- *Analytics Workbook*
- *Using the Reports Tab*
- *Using the Drag-and-Drop Report Builder*
- *Do your big reports take a long time to return data?*
- *Report Formula Summary Functions*
- *FAQ: Scheduling Reports*
- *Tips for Creating Dashboards*
- *One Dashboard For Many Viewers*
- *Taking Advantage of Dynamic Dashboards*
- *Sample CRM Dashboards*
- *What are Joined Reports?*
- *Using Cross Filters in Reports*
- *Using Bucket Fields*

For Sales Professionals

The following documents apply to sales professionals:

Enterprise Territory Management

- *Enterprise Territory Management Implementation Guide*

Account Management

- *Getting Microsoft® Outlook® and Salesforce in Sync*
- *Get Ready to Sync Contacts and Events with Exchange Sync (Beta)*

- *Tips & Hints for Sales Reps*
- *Importing Your Personal Accounts and Contacts*
- *Implementing Data.com Clean*
- *Tips for Using Content Deliveries*
- *Tips for Using HTML Email Templates*
- *Using Force.com Connect for Office*
- *Salesforce Bulk Mail Merge Process*
- *Guidelines for Uploading Mail Merge Templates*
- *Sample Mail Merge Templates* (Zip file)
- *Getting Started with Force.com Connect Offline*
- *Tips & Hints for Working with Territories*

Pipeline Management

- *Collaborative Forecasts Implementation Guide*—For administrators of Collaborative Forecasts.
- *Using Customizable Forecasts*—For users of Customizable Forecasting. For more information, search for "Customizable Forecasting Overview" in the Salesforce online help.
- *Tips & Hints for Products & Schedules*

Pardot and Salesforce Integration

- *Syncing Between Pardot and Salesforce*

Mobile

- *Using the Salesforce1 App*
- *Salesforce Classic Mobile User Guide for iPhone*
- *Salesforce Classic Mobile User Guide for Android*

For Support Professionals

These documents are for support professionals.

- *Tips & Hints for Support Reps*
- *Getting Started with your SoftPhone*
- *Using the Console Tab*
- *Tips & Hints for Solutions*
- *Getting to Know Case Feed*
- *Live Agent for Support Agents*
- *Live Agent for Support Supervisors*

For Marketing Professionals

The following documents apply to marketing professionals:

- *Getting the Most from Your Leads*

- *Five Steps for Managing Campaigns*
- *Tips for Using Content Deliveries*
- *Using Data.com Clean in Salesforce*

For Analytics Cloud Professionals

The following documents apply to Analytics Cloud users:

Wave Analytics

- *Wave Analytics Setup Guide*
- *Wave Analytics Security Implementation Guide*
- *Wave Analytics Data Integration Guide*
- *Analytics Cloud External Data API Developer's Guide*
- *Analytics Cloud External Data Format Reference*
- *Analytics Cloud SAQL Reference*
- *Analytics Cloud Dashboard JSON Reference*
- *Wave Analytics Extended Metadata (XMD) Reference*

For Administrators

The following documents apply to administrators:

Mobile Administration

- *Salesforce1 Mobile App Admin Guide*
- *Salesforce Classic Mobile Implementation Guide*

Sales Administration

- *Get Started with Sales Cloud*
- *Enhance Your Sales Cloud Implementation*
- *Enterprise Territory Management Implementation Guide*
- *Team Selling Implementation Guide*
- *Setting Up Shared Calendaring*
- *Implementing Person Accounts*
- *Collaborative Forecasts Implementation Guide*
- *Setting Up Customizable Forecasting*
- *Customizable Forecasting FAQ*
- *Salesforce CRM Content Implementation Guide*
- *Administering Salesforce Desktop Clients*
- *Helping Users Sync Contacts and Events with Exchange Sync (Beta)*
- *Getting Started with Relationship Groups*
- *Getting Started with Assets*

- *Work.com Implementation Guide*
- *Deploying Territory Management* (This version of Territory Management precedes Enterprise Territory Management.)

Support Administration

- *Service Communities Guide*
- *Salesforce Console Implementation Guide*
- *Setting Up Customer Support*
- *Case Management Implementation Guide*
- *Solutions Implementation Guide*
- *Getting Started with Setting Up Call Centers*
- *Getting the Most from Your Self-Service and Customer Portals*
- *Salesforce Customer Portal Implementation Guide*
- *Chatter Answers Implementation Guide*
- *Self-Service Portal Implementation Guide*
- *Salesforce CRM Content Implementation Guide*
- *Salesforce Knowledge Implementation Guide*
- *Setting up Salesforce Knowledge*
- *Importing Articles into Salesforce Knowledge*
- *Answers Implementation Guide*
- *Entitlement Management Implementation Guide*
- *Live Agent for Administrators*
- *Setting Up Case Feed*
- *Getting Started with the Ideas Base Theme*
- *Getting Started with Social Customer Service*
- *Organization Sync Implementation Guide*
- *Set Up Omni-Channel*
- *Set Up SOS Video Chat and Screen-Sharing*

Marketing Administration

- *Tips for Lead Administrators*
- *Salesforce Lead Management Implementation Guide*
- *Campaign Management Implementation Guide*
- *Salesforce Ideas Implementation Guide*

Communities and Collaboration Administration

- *Getting Started With Salesforce Communities*
- *Community Templates for Self-Service Implementation Guide*
- *Communities Managers Guide*
- *Migrating From Portals to Communities*

- *Quick Actions Implementation Guide*
- *Customizing Chatter Profile Pages*
- *Salesforce Files Sync Implementation Guide*
- *Salesforce Files Connect Implementation Guide*

Salesforce Implementations

- *Salesforce Enterprise Edition Upgrade Guide*
- *Setting Up Salesforce Group Edition*
- *Salesforce Limits Quick Reference Guide*

Customization

- *Tips & Hints for Record Types*
- *Building Salesforce Custom Links*
- *Tips & Hints for Page Layouts and Field-Level Security*
- *Building Custom Objects, Tabs, and Related Lists*
- *Implementing State and Country Picklists*
- *Formulas Quick Reference Guide*
- *Useful Formula Fields*
- *Tips for Reducing Formula Size*
- *Using Date and Date/Time in Formulas*
- *Useful Validation Rules*
- *Using Multiple Business Processes*
- *Workflow: Automating The Process*
- *Useful Workflow Rules*
- *Getting Started with Approval Processes*
- *Useful Approval Processes*
- *Visual Workflow Guide*
- *Creating Lookup Filters on Relationship Fields (Beta)*

Security and Data Management

- *Managing Duplicate Records in Salesforce*
- *Security Implementation Guide*
- *Single Sign-On Implementation Guide*
- *Understanding User Sharing*
- *Understanding Defer Sharing Calculations*
- *Managing Data Quality*
- *Implementing Data.com Clean for Accounts, Contacts, and Leads*
- *Importing Your Organization's Accounts and Contacts*
- *Using Mass Delete to Undo Imports*

- *Getting Started with Divisions*
- *Data Loader Guide*
- *Salesforce Field Reference Guide*
- *Resolving Data Conflicts and Errors in Force.com Flex Apps*
- *Salesforce Identity Implementation Guide*
- *Identity Connect Implementation Guide*

Extending Salesforce

- *Developing Packages for Distribution*
- *Force.com Sites Implementation Guide*
- *OEM User License Comparison*
- *Custom Metadata Types Implementation Guide*

Globalization

- *Setting Up the Translation Workbench*
- *International Organizations: Using Multiple Currencies*

Video Demos

Salesforce creates video demos to help you be successful with Salesforce.

- Chatter
- Sales
- Service
- Analytics
- Data.com
- Force.com
- Site.com
- Security
- Data Import

Chatter

Video Title	For End Users	For Administrators
▶ Tips for Rolling Out Chatter Not sure how to rollout Chatter in your organization or drive adoption among users? Watch this short video to see your options and come up with a plan unique to your business needs.		✔

Video Title	For End Users	For Administrators
▶ Collaborate in Chatter Groups Chatter groups offer collaboration spaces with different degrees of privacy that allow group members to work as a team, share resources, and even invite customers. Watch this video to plan your organization's group strategy and make the most of out of the group feed, group search, files, announcements, and other powerful features.	✔	✔
▶ Discover and Organize with Chatter Topics Use Chatter topics to see what people are talking about, organize the conversations you want to be a part of, and discover people and groups that are interested and knowledgeable in the same areas.	✔	
▶ Getting the Most Out of Chatter Feeds Use Salesforce Chatter to create posts, polls, and bookmarks to collaborate effectively with your coworkers in Chatter. You learn how to post to your followers or a group, bookmark a post so you can find it later, and how to create a poll on the fly so you can gather results fast!	✔	
▶ Enhancing Your Chatter Posts Learn how to use @mentions and hashtag topics to enhance your Chatter posts. Mentions alert others to your posts, and topics help you organize and search Chatter so you can find relevant content and conversations.	✔	
Get Started with Salesforce Files Sync ▶ Learn how to sync files between your computer or mobile device and Salesforce so you always have the latest version of every file. Salesforce Files Sync makes it easy to share files and collaborate with your colleagues.	✔	

Sales

Video Title	For End Users	For Administrators
▶ Use Tasks in Lightning Experience to Boost Sales Productivity Managing tasks in Salesforce is the ideal way for sales teams to stay on top of customer relationships. Learn three powerful ways to manage tasks in Lightning Experience.	✔	
▶ Take Your Tasks from Desktop to Mobile	✔	

Video Title	For End Users	For Administrators
Stay on top of your tasks when you're on the go by using the Salesforce1 app for phones and tablets.		
Accounts and Contacts on the Go Combine desktop and mobile data with the Salesforce1 app for phones and tablets.	✔	
Splitting Credit across Your Sales Team Learn how to add revenue and overlay splits to opportunities.	✔	
Connecting Social Networks to Accounts, Contacts, and Leads Gain insights to your current and prospective customers by adding social data to your Salesforce accounts, contacts, and leads.	✔	
Editing Role-Based Category Group Visibility Allows certain roles to view information, such as questions in an answers community or articles in a knowledge base, according to specific data categories.		✔
Forecast Accurately With Collaborative Forecasts See how to maneuver around Collaborative Forecasts so that you can reach your sales goals.	✔	
How to Manage Leads and Opportunities Learn how Salesforce can help you track your leads and opportunities through the sales funnel, and automatically incorporates updates into management forecasts.	✔	
Sending Mass Email This demo shows you how to leverage the mass email tool in Salesforce, so you can quickly contact your customers and keep track of these emails within the Salesforce app.	✔	
Setting Up Data Categories Data categories let you classify your data based on your business needs.		✔
Using Quote Templates (1:42 minutes) Quote templates let you design, preview, and activate templates for the quote PDFs you send to your customers.	✔	

Video Title	For End Users	For Administrators
▶ Entitlements Management Setup Learn how to set up the Entitlement Management feature. Entitlement Management helps your support reps determine which customers are eligible for certain kinds of support. This video covers Entitlement Management Milestones, Entitlement Processes, Entitlements, and Service Contracts.		✔
▶ How to Merge Contacts in Salesforce Learn how you can merge duplicate contact records in Salesforce.	✔	
Exchange Sync Videos		
▶ Set Up an Exchange Sync Service Account from the Exchange Admin Center Shows your Exchange administrator how to set up your company's server to sync your sales reps' contacts and events using Exchange Sync. This video demonstrates how to navigate set up using the Microsoft® Exchange admin center.		✔
▶ Set Up an Exchange Sync Service Account at the Command Line Shows your Exchange administrator how to set up your company's server to sync your sales reps' contacts and events using Exchange Sync. This video demonstrates how to set up Microsoft® Exchange for Exchange Sync using Microsoft® Exchange Management Shell.		✔
Salesforce for Outlook Videos		
▶ Getting Ready to Integrate Microsoft® Outlook® and Salesforce If you want to sync contacts, events, and tasks between Microsoft® Outlook® and Salesforce, as well as add emails and events to Salesforce records, you'll use Salesforce for Outlook. Learn how to download and install it.	✔	
▶ Learning about Sync Directions Learn how to view your sync direction settings in Salesforce for Outlook, and find out whether you have permissions to change them.	✔	
▶ Using the Salesforce Side Panel to Work with Records in Microsoft® Outlook® Learn how you can work with Salesforce records directly in Outlook. In addition, learn about adding Outlook emails and events to the Salesforce records of your choice.	✔	
▶ How to Use Notes (1:34)	✔	

Video Title	For End Users	For Administrators
Learn how to use Notes, the enhanced note-taking tool in Salesforce1.		
How to Track Calls, Emails, and Meetings Learn how to track different events such as calls, emails, and meetings in Salesforce.	✔	
Merging Duplicate Accounts: Tips and Gotchas Do you have multiple records for the same account? Duplicate account records wreak havoc on your data. Reporting becomes inaccurate and keeping track of activities and tasks is impossible. Merge Accounts tool lets you merge all the account records into one, and let you choose which data to keep from each record. This video guides you through the process so you can get clean, useful data, quickly.	✔	

Service

Video Title	For End Users	For Administrators
Encourage Collaboration with Idea Themes Idea Themes lets you invite community members to post ideas about specific topics so that members can solve problems or propose innovations for your company.	✔	
Introducing the Salesforce Console The Salesforce console uses tabs to help you find and update records quickly.	✔	
Prepare to Set up a Salesforce Console How to set up a Service Cloud console for support agents.		✔
Supporting Multiple Languages with Salesforce Knowledge Learn how to translate knowledge base articles with Salesforce Knowledge.		✔
Updating Entitlement Processes with Entitlement Versioning Learn how to create a new version of an entitlement process, change the milestone in the new version of the entitlement process, and apply the new version of the entitlement process to an entitlement and its associated cases.		✔
How Organization Sync Works Learn about Organization Sync, a high-availability feature that lets you set up a secondary, synced Salesforce organization which your users can access when the primary organization		✔

Video Title	For End Users	For Administrators
experiences downtime or maintenance. Find out how the feature works, what the setup process looks like, and whether it's right for you.		
▶ Support Your Customers on Their Social Networks Learn how to get started with Social Customer Service.		✔

Analytics

Video Title	For End Users	For Administrators
▶ Create the Sales Wave App, Part 1: Using the Configuration Wizard The Sales Wave Analytics app is an end-to-end analytics app that brings the power of Wave Analytics to Sales Cloud. Salesforce makes it easy to create, share, and delete the Sales Wave app. We show you how in this video.		✔
▶ Create the Sales Wave App, Part 2: Upload the Quota CSV File and Schedule a Dataflow When you create the Sales Wave app, if you track quotas for sales reps in Salesforce, you also need to upload a quota CSV file. You also need to schedule a dataflow to keep data in the app up to date. This video shows you how to do both.		✔
▶ Make Data-Driven Decisions with Reports and Dashboards Join us for a feature overview of Reports and Dashboards in Lightning Experience. See an example of how to gain insight and inspire action using your Salesforce data.	✔	
▶ Building Matrix Reports This video shows you how easy it is to create matrix reports using report builder.	✔	
▶ Using Cross Filters in Reports Use a cross filter to find just the records you need in a report. Cross filters let you fine-tune your results by including or excluding records from related objects, without having to write formulas or code.	✔	
▶ Getting Started with Buckets	✔	

Video Title	For End Users	For Administrators
Learn how to group your data without having to create custom fields! Buckets help you sort, organize, and understand large amounts of data in Salesforce quickly and easily. Create your own categories on the fly, without formulas or custom fields.		
Getting Started with Report Builder This video introduces you to the report builder, a powerful drag-and-drop interface for building reports.	✔	
Introducing Joined Reports in Salesforce With joined reports, you create different types of information in a single report. Our example creates open and closed opportunities and active support cases.	✔	
An Overview of Dashboards This demo covers some key dashboard features, such as changing the visual display, changing drill down options, and creating dynamic dashboards, so sales managers and team members can use one dashboard to track their team's or individual performance.	✔	
Tips for Scheduling Reports Learn how to schedule reports with an active running user, send them during off-peak hours without impacting performance, and email them to the right users.		✔
Making Your Reports Run Faster Get tips to make your reports run faster. Learn how to remove unnecessary columns, set the scope for relevant data, and use efficient filters with operators.	✔	
Report Notifications Learn how to subscribe to reports to receive report notifications periodically, when the metrics you care about most meet certain conditions. You can receive your alerts via Salesforce1 notifications, Chatter, or email.	✔	

Data.com

Video Title	For End Users	For Administrators
Finding Data.com Accounts and Contacts and Adding Them to Salesforce	✔	

Video Title	For End Users	For Administrators
Learn how to find Data.com accounts and contacts and add them to Salesforce. Check out the Account Card.		
How Do I Set Up Data.com Clean? This video shows Salesforce administrators how to set up and maintain Data.com Clean. It covers the clean features available with the Data.com Corporate and Premium products, plus the additional features available with the Data.com Clean product.		✔
Select a Data.com Match for your Salesforce Account Record		
Using the Data.com Industry Selector Learn how to use the Data.com Industry Selector to navigate easily through extensive industry lists and add industry criteria to your search for accounts or contacts.	✔	
Managing Duplicate Records in Salesforce with Duplicate Rules (3:12) Learn how to create a duplicate rule so you can control whether and when users are allowed to save records that are identified as duplicates.		✔
Identifying Duplicate Records with Matching Rules (3:12) Learn how to create a matching rule so you can control how duplicate records are identified.		✔
Understanding Matching Rules (4:32) Learn how matching rules work to identify duplicate records.		✔

Force.com

Video Title	For End Users	For Administrators
How to Change the Look and Feel of Salesforce for Your Company Quick demo of how to customize the way Salesforce looks for your organization.		✔
Search in Salesforce Classic	✔	

Video Title	For End Users	For Administrators
Salesforce helps you keep track of, organize, and store so much information - how do you search through it all? This video walks you through searching in Salesforce, and within Chatter, so you can locate files, posts, records, and topics quickly.		
▶ Search in Salesforce Lightning Experience Need to quickly find a record in Salesforce? This video guides you through searching in Salesforce Lightning Experience and navigating search results.	✔	
▶ How Does Search Work? Ever wonder how search finds information in your org? This video guides you through the search process, including how your search terms are broken up and matched against the search index.	✔	✔
▶ How to Search In Help Our Help portal is extensive, with everything from documentation, to troubleshooting-type knowledge articles, videos, and more. Fine tune your search settings and learn to use the filters so that you can find exactly what you need, every time.	✔	
▶ Creating a Workflow Rule Quick demo of how to create a workflow rule in Salesforce.		✔
▶ Visual Workflow Cloud Flow Designer Overview This demo gives you an overview of Visual Workflow's Cloud Flow Designer, the tool for creating flows. With the Salesforce Cloud Flow Designer, you can configure screens and define branching logic for your flows, completely within Salesforce, without writing any code.		✔
▶ Building a Simple Flow Follow along as we create a simple two-screen pledge flow using user input fields and choices. We'll collect users' information, ask them to choose a pledge level, then thank them for their donation.		✔
▶ Troubleshooting Workflow Learn how to investigate and troubleshoot the most common issues that occasionally arise with Workflow.		✔
▶ Avoid Unwanted Actions in Your Process		✔

Video Title	For End Users	For Administrators
This video shows you how to set options in the Process Builder so you can, for example, avoid sending a bunch of emails to the VP every time a high-value opportunity is updated.		
▶ How to Create a Custom Field in Salesforce Want to customize Salesforce so it captures all your business data? This short video walks you through how to create a custom picklist field, from choosing the correct field type to applying field level security.		✔
▶ Custom Fields: Picklists Picklists are a great way to save your users time and ensure that data is entered consistently, without spelling errors, or variations. This video walks you through creating a picklist field as well as adding new values to the field, and deleting old values. We even cover how to add your values to the correct page layouts, so your users see choices that are relevant to their work.		✔
▶ Accessing the Email Field from a Lookup Object Have you ever wanted to use a field from a lookup object on its child object? For example, accessing the email field on a lookup object in a workflow that is based on the child object? This video walks you through just such a scenario.		✔
▶ Getting Started With Formulas This video gives a brief introduction to Salesforce formulas, accessing the formulas editor in the app, and how to use the editor tools to create formulas.		✔
▶ How to Calculate the Number of Days a Case is Open This video walks you through constructing a formula that will calculate the number of days it took to close a case, or if the case is still open, how many days have passed since it was first opened.		✔
▶ How to Build an Image Formula This video explains how to create a quick and easy formula that adds graphics to the ratings field on a lead—five stars for hot, three stars for warm, and one star for cold—so that salespeople can see at a glance which leads are the most important.		✔
▶ Formulas: Tips and Gotchas Formulas are a powerhouse and can be used in fields and reports. This video walks you through a few pro tips on how to get started, and how to avoid some common pitfalls. We use best practices such as writing your formula in plain language, and using formatting		✔

Video Title	For End Users	For Administrators
to organize the formula so its easy to read. We also cover how to handle blank fields in both addition or subtraction, and division.		
▶ Release Management: Overview Learn how to use Force.com point-and-click tools, a developer sandbox, and change sets to manage releases for your organization.		✔
▶ Release Management: Developing and Testing on Sandbox Learn about the four types of sandboxes that Salesforce provides, and discover how to create sandboxes to develop and test your applications.		✔
▶ Release Management: Deploying Changes Using Change Sets Learn how to use change sets to move configuration changes, such as applications, objects, and permission sets, between your organizations.		✔
▶ Creating Custom Links and Buttons Learn how to create a link on the Account object that maps the company's address onto Yahoo Maps. We'll also show you where you could turn that link into a button. Custom links and buttons are a fast and easy way to customize Salesforce.		✔
▶ Using and Building List Views Do you need to work with several records at once? Sort them alphabetically or by amount? Or even edit several of them at once? List views are the way to go! This video walks you through creating two different views. In the first view you'll sort by amount, then filter, and then mass edit. In the second view, you'll use filter logic to create a view that shows your records and those of a teammate.	✔	
▶ Custom Fields: Tips and Gotchas Are you creating custom fields? Watch this video first and learn from the experts some best practices, details about deleting fields, field usage limits, field history tracking and more. We also provide some caveats when changing field types, and advice on choosing the appropriate type of text field.		✔
▶ Force.com Quick Access Menu As an admin have you ever wanted to view or create fields, or view or create record types in context, from an object tab, rather than having to go through the Setup menus? This video shows you how to use the Force.com Quick Access Menu. It's a handy tool that Admins can use to make changes to an object's configuration or import data for that object without having to go to Setup pages.		✔

Site.com

Video Title	For End Users	For Administrators
▶ Building a Website with Site.com Learn how to import assets to use in your site, create page templates, apply CSS styles, and add and duplicate site pages in Site.com Studio.	✔	

Security

Video Title	For End Users	For Administrators
▶ Who Sees What: Overview Learn how you can control who sees what data in your organization.		✔
▶ Who Sees What: Organization Access Learn how to restrict login through IP ranges and login hours.		✔
▶ Who Sees What: Object Access Learn how you can grant users access to objects by using profiles.		✔
▶ Who Sees What: Organization-Wide Defaults Learn how you can restrict access to records owned by other users.		✔
▶ Who Sees What: Record Access via the Role Hierarchy Learn how you can open up access to records using the role hierarchy.		✔
▶ Who Sees What: Record Access via Sharing Rules Learn how you can grant access to records using sharing rules.		✔
▶ Who Sees What: Field-level Security Learn how you can restrict access to specific fields on a profile by profile basis.		✔
▶ Who Sees Whom: User Sharing Learn how you can control visibility among users in your organization.		✔

Video Title	For End Users	For Administrators
▶ Who Sees What: Permission Sets Learn how to give users additional permissions and access settings without changing profiles.		✔
▶ Who Sees What: Record Types Learn how to organize and gather data for the same object, in different ways, using record types.		✔
▶ Creating a Criteria-Based Sharing Rule Learn how to create a sharing rule based on a field value in a record.		✔
▶ Letting Your Salesforce Administrator Access Your Account Learn how you can grant your administrator access to your Salesforce account without distributing your password.	✔	
▶ Removing Users' Access to Salesforce Deactivating users in Salesforce removes access to their account data while preserving their historical activity and records. Once you understand why you deactivate users rather than deleting them, learn how to deactivate someone and see what happens to their data.		✔
▶ Activating Your Computer Learn how to activate your computer so you can log in to Salesforce outside the office.	✔	
▶ Enhancing Security with Two-Factor Authentication (6:56 minutes) See a demonstration of Two-Factor Authentication for Salesforce, and when to use it.		✔
▶ How to Grant Login Access (2:25 minutes) To help you, your Salesforce administrator, or Salesforce Support, can log in to your Salesforce account. This video demonstrates how to let your Salesforce Admin or Salesforce Support access your account for a specified amount of time without distributing sensitive information like your password.	✔	

Data Import

Video Title	For End Users	For Administrators
▶ Cleaning Up Your Import File Learn how to clean up your import files and get Salesforce ready, as well as best practices for keeping data clean once it's been imported.		✓
▶ Cleaning and Preparing Your Data Using Excel Excel offers many features and functions to make quick work of getting your data files ready for import. We'll show you some practical ways to use these features with your import data.		✓
▶ Choosing the Right Tool Learn Data Loader in depth, so you can decide whether it's right for your needs. We compare it to the Import Wizards and also list some other tools you might consider.		✓
▶ Owner IDs and Parent IDs Learn, step by step, which objects should be imported, and when. We'll cover how to make sure each child object, such as opportunities, has the correct owner and parent record, and we'll show you a demo in the user interface of how to do this using the Data Loader tool.		✓
▶ Best Practices for Importing Data Learn the top pain points experienced by our customers, so you can avoid them entirely! This video could save you hours of frustration. We detail how to delete a bad import, how to back up data before import, and more.		✓
▶ Importing Your Accounts and Contacts—Part 1: Exporting Your Data In this video, we'll walk you through how to import Account and Contact data using the Data Import Wizard. Once you have your data in a csv file, you can use the wizard to import it and map fields.		✓
▶ Importing Your Accounts and Contacts—Part 2: Importing Your Data		✓

SEE ALSO:

Tip Sheets and Implementation Guides

Get More Done Faster with Walkthroughs

Interactive walkthroughs guide you step-by-step through a task or feature. Salesforce creates walkthroughs to help you be successful with Salesforce.

Before you click a walkthrough link, make sure you have the correct user permissions and license associated with the feature so you can access the proper pages in Salesforce. Then, click the link to open the walkthrough. If you're not already logged in, you'll be prompted to log into your account.

The walkthrough guides you through a series of steps to help you complete a task or review a feature directly within your own Salesforce account.

> 📝 **Note:** Keep in mind that walkthroughs guide you through your own Salesforce account rather than a demo environment. So you're actually making changes to the data in your org as you follow along through the steps. If you're concerned about making these changes, follow the walkthrough in a sandbox account or other test environment first.

Troubleshooting

Troubleshoot Login Issues

Salesforce makes it easy to log on to the service, but you can experience issues if you forget your username or password. You can also get locked out if you attempt to log in too many times with the wrong credentials. Following are some solutions you can try if you're having login problems.

The password policies set up by your administrator determine how many failed logins are allowed, how long lockout periods last, and what password requirements are.

To protect the privacy of your data, change your password periodically. If your administrator expires user passwords on a periodic basis, you're prompted to change your password at the end of each period.

- Forgot your password? Retrieve it.
- Locked out? Wait until the lockout period expires and try again, or contact your Salesforce administrator.
- Password expired? We prompt you to change your password.
- Accessing Salesforce from a new location? You might need to activate your computer.
- What does Use Custom Domain on the login page mean? If your Salesforce administrator created a custom domain for your organization, click **Use Custom Domain** to provide the existing domain name and log in.

  A custom domain is in the form `https://universalcontainers.my.salesforce.com`, where `universalcontainers` is a name provided by your administrator.

SEE ALSO:

Reset Your Security Token

Reset Your Forgotten Password

Reset Your Security Token

When you access Salesforce from outside of your company's trusted network using a desktop client or the API, you use a security token to log in. A security token is a case-sensitive generated key that you use with your password or in a separate field in your client application.

Your security token isn't displayed in your settings or profile.

If your administrator assigned you the "Two-Factor Authentication for API Logins" permission, use the value generated by your authenticator app, such as Salesforce Authenticator or Google Authenticator, for the security token value.

Get or Reset Your Token

A new security token is emailed to you when you reset your password. Or you can reset your token manually.

1. From your personal settings, enter `Reset` in the `Quick Find` box, then select **Reset My Security Token**.

2. Click **Reset Security Token**. The new security token is sent via email to the email address in your Salesforce personal settings.

   💡 Tip: Before you access Salesforce from a new IP address, we recommend that you get your security token from a trusted network using **Reset My Security Token**.

Update Your Token in Salesforce Outlook Edition

1. In Outlook, go to **Tools** > **Salesforce Options**.

2. In the password window, enter your password and security token, with the security token added to the end of your password. For example, `passwordXXXXX`.

3. To test that you correctly entered your password and token, click **Verify**.

4. Click **OK**.

Update Your Token in Connect Offline, Connect for Office, and Data Loader

When you log in, add the security token value to the end of your password, such as `passwordXXXXX`.

   📝 Note: If you get an invalid password error when you log in, your IP address might have already been authenticated or added to the Trusted IP Range by your administrator. In this case, try logging in with your password only.

SEE ALSO:

   Find Your Personal Settings in Salesforce Classic

   Can't find the Reset My Security Token option?

Grant Login Access

To assist you, your administrator or a customer support representative can log in to the application using your login. By default, your company's administrators can access your account without any action from you. If your organization requires users to grant login access to administrators, you can grant access for a specified duration. You can also grant access to representatives of support organizations.

Watch a Demo: ▶ Letting Your Salesforce Administrator Access Your Account

For security reasons, the maximum period for granting access is one year. During the time you granted access, administrators or support representatives can use your login and access your data to help you resolve problems.

1. From your personal settings, enter `Login Access` in the `Quick Find` box, then select the option to grant login access.

2. Set the access expiration date by choosing a value from the picklist.

3. Click **Save**.

If an administrator, support representative, or publisher makes setup changes using your login, the setup audit trail lists the changes and the username. In some organizations, records of clicks made by an administrator logged in as you are also kept for auditing purposes.

> 📝 **Note:** You can't grant access to certain support organizations if your administrator set up restrictions, or if a packaged application's license prevents it.

SEE ALSO:

Get to Know Your Salesforce Admin

Find Your Personal Settings

Reset Your Forgotten Password

If you forgot your password, you can easily reset it using the forgot password link on the login page. All you need is your username.

▶ Watch a Demo (33 seconds)

1. On the login page, click the forgot password link.

2. Enter your username and click **Continue**. An email containing instructions to reset your password is sent to the address specified in your Salesforce personal settings.

3. Within 24 hours, click the link provided in the email, answer your security question, and click **Continue**. (The link in the email can be used only once, and expires after 24 hours.)

4. When prompted, enter a new password.

Sometimes you're prompted to enter a code when you log in to Salesforce to verify your identity. When you verify your identity, you also "activate" your computer. Computer activation allows Salesforce to associate your identity with your computer's network IP address.

The activation helps prevent unauthorized access to the service whenever your password is changed or reset, or when you use your computer to log in from an unauthenticated network IP address.

SEE ALSO:

Activate Your Computer

Troubleshoot Login Issues

INDEX