Get Started with Sales Cloud Implementation Guide

Salesforce, Spring '18

'18

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INTRODUCTION

Welcome to Salesforce

With Salesforce, you can work smarter, connect better with customers, sell more, and grow your business faster. But before you start closing more deals, you must get your business set up in Salesforce.

Salesforce offers a customizable platform that can grow with your business. Salesforce stores critical information about your customers and helps you connect and close deals with new customers. You can modify the Salesforce platform to reflect how your company does business. You can add new features as you grow, so that your information system is always the right size for your business.

This guide is designed to help Salesforce administrators set up and customize a new sales organization using the Salesforce Classic user interface. After setup is complete, you can use most features in either the Salesforce Classic or Lightning Experience user interface.

We assume you're familiar with common office programs such as Microsoft® Excel® and know at least a little about computer systems. You don't have to be a Salesforce expert to get started. You'll learn much of what you need to know as you work in Salesforce.

How to Use This Guide

We've arranged the information in this guide in the order you'll need it.

1. Add Users

Start by learning how Salesforce helps you manage users, and add user accounts to your organization. It's essential to add users before importing your data, so that your existing records can be matched up to their owners.

2. Fine-Tune Pre-Existing Features

Next, work with Salesforce's existing, or *standard*, fields, objects, and tabs. Modifying the standard setup by renaming fields, tabs, and objects or by changing what data fields can contain lets you better reflect your organization's business practices.

3. Import Your Data

With your records and users set up, you're ready to import your existing data into Salesforce. We'll help you prepare your data to be imported, introduce you to data import tools, then lead you through using our data import wizard.

4. Set Up Basic Reportings

Enhance your organization's efficiency by setting up automation to perform actions based on changes to Salesforce data, such as sending records to managers for approval or notifying users of changes to records they own. Then, enable powerful analytics such as standard and custom reports and dashboards to enable users and other stakeholders to review activities and track metrics.

5. Roll It Out

Finally, we provide some tips on how to roll out Salesforce to your users. Your roll-out strategy will drive how quickly and happily your users adopt Salesforce. We'll also show you where you can learn more about other existing features and keep up-to-date with the latest Salesforce products and features.

6. After You Implement Salesforce

Learn how to network with other administrators, learn new skills, and keep your company on the leading edge by staying up-to-date with updates and new features.

Before You Get Started

Before you start setting up Salesforce, take some time to review your organization's vision, pain points, goals, and priorities. Knowing what your organization hopes to gain from Salesforce helps you make decisions during the setup process, such as what customizations to make and requirements for reports.

- What is your overall vision, and how will Salesforce fit into it?
- What pain points do your sales organization hope to fix with Salesforce?
- What organizational goals can be reached using Salesforce? At a minimum, consider what your executives, managers, and end users can gain.
- How will you measure progress toward your goals?
- How should these goals be prioritized?

Also, you should be familiar with your organization's sales process, so that you can decide how best to configure Salesforce to help your users make and close deals in the way that works for them.

How to Get Help

As you set up Salesforce, you may find that your organization has special requirements that aren't discussed here or that you have questions that aren't answered in this guide. Here's where you can go for help.

Salesforce Online Help

Salesforce online help offers explanations and instructions on hundreds of topics. Search for topics of interest at http://help.salesforce.com/

Getting Started Trailblazer Community

Salesforce Success Communities are the place to go to ask questions and get help from other admins and Salesforce experts. Visit the Getting Started Trailblazer Community for help while implementing Salesforce.

Key Concepts and Terms

As you getting up to speed with Salesforce, it's helpful to learn some key concepts and terms. They 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.

Concepts

Concept	Definition
Cloud	A Salesforce name for a loose federation of features that help you accomplish certain types activities, such as selling products or supporting your customers. Two common examples 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.

Concept	Definition
Trust	A Salesforce term for its company-wide commitment to building and delivering the most secure, fast, and reliable cloud-based service available.
	`trust.salesforce.com` is a systems status website that provides Salesforce customers and the community access to real-time and historical system performance information and updates. It also lists 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 Service. 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 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 has 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 your data and applications.
Record	A collection of fields that store information about a specific item of a specific type. A record is an object, such as a contact, an account, or an opportunity. For example, you can 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 we identify releases 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. They also describe 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 and the company name.

Standard Objects

Concept	Definition
Account	An organization, individual, or company that you want to track in Salesforce. An account can include customers, competitors, partners, or any other entity that makes sense for your business. An account

Concept	Definition
	contains records--or connects to--all information about your interactions with the company, such as points of contact, in-progress and completed opportunities, and records of past interactions.
Contact	A person who works at an organization represented by an account. A contact record contains information such as phone numbers, titles, and the person's role in the deal. With contacts, you can capture all the personal information you need to develop the relationships that are so important in sales.
	When a lead is converted, the information in the lead is automatically transferred into the contact. As your engagement with the company widens and your reps meet more people, they can keep creating additional contacts associated with the corresponding account.
Lead	A lead is a potential customer: any person who may be interested in your products and services. For example, this could include someone you met at a conference or who filled out a form on your website. If a rep qualifies a lead and decides to pursue it, the lead is "converted", which automatically transfers the lead's data into three objects: an account, a contact, and an opportunity.
Opportunity	An opportunity is a deal you're working on, and the opportunity object in Salesforce tracks all the information you're tracking about the deal, such as size and expected close date. The opportunity object is at the core of your sales process. By adding an opportunity, you build a "pipeline" you can use for forecasting.

Salesforce Editions

We offer bundles of features and services, each geared toward specific business needs.

These bundles, called *editions*, share a look and feel but vary by functionality and pricing. Some customers start with a basic edition and upgrade to a more feature-rich edition as business requirements evolve.

It's easy to learn which features are available in various editions. Just search for features in Salesforce Help. Toward the top of every topic, you can see the editions in which the feature's available. Here's a quick description of each edition we offer.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Essentials**, **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Edition	What's Great About It
Essentials	Designed for small businesses that want to get started with a CRM system quickly. It includes intuitive walkthroughs and a setup assistant to get started, an easy-to-use UI, and administration tools to customize your deployment as you grow.
Professional	Designed for businesses requiring full-featured CRM functionality. It includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment.
Enterprise	Meets the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to Salesforce APIs, so you can easily integrate with back-office systems.

Edition	What's Great About It
Unlimited	Maximizes your success and extends it across the entire enterprise through the Lightning platform. It gives you new levels of platform flexibility for managing and sharing all your information on demand. Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.
Developer	Provides access to the Lightning platform and APIs. It lets developers extend Salesforce, integrate with other applications, and develop new tools and applications. Developer Edition also provides access to many of the features available in Enterprise Edition. Note: Salesforce doesn't provide technical support for Developer Edition. But you can ask for help from developer community message boards after you register for the Lightning Platform developer website: developer.salesforce.com. We also provide documentation for Developer Edition.

Compare editions and their features in Salesforce Pricing and Editions.

ADD USERS

User Account Overview

Each person who accesses Salesforce must have a user account. The user account identifies the user. Settings for the user account determine what features and records the user can access.

For each user account you create, enter the following:

- A username
- The user's email address
- The user's name
- A user license
- A profile
- Optionally, a role

📝 **Note:** When you add users, you can opt to have Salesforce send each user their username and password immediately. If you're setting up a new Salesforce organization, you probably aren't ready for your users to log in yet, so don't choose this option. You can have the username and password sent later.

Key Concept and Terms for User Accounts

Here are a few things you need to know about before you add users.

Usernames

When you set up a new user, you must enter both a username and an email address for that user. Both the username and the email address must be in the form of an email address.

- The username doesn't have to be a real email address--it just has to use the same format as an email address.
- The email address must be a real email address. The same email address can be used in more than one Salesforce organization, as long as each username is unique--otherwise Salesforce wouldn't know what organization the user was trying to log in to.

User Licenses

The license assigned to each user determines which features the user can access in Salesforce. The "Salesforce" license gives users access to standard Salesforce features and Chatter, and is probably right for most users.

For more information, see Standard User Licenses in the Salesforce online help.

Profiles

Profiles determine what users can do. Each profile includes a set of permissions, such as access to particular objects, fields, tabs, and records. Each user can be assigned only one profile. The most common profiles are:

- *System Administrator*: By default, the system administrator profile has the greatest access to your Salesforce organization. Users with this profile can configure and customize the application.
- *Standard User*: Users with this profile can create and edit most records, and run reports.
- *Read Only*: Users with this profile have limited access to your Salesforce organization. They can run and export reports and view--but not edit--records.

Select a profile for each user based on the user's job functions. For most users, the Standard User profile is the best choice. To maintain data security, don't give a user a profile that includes more access than needed for their job. For example, a typical sales rep doesn't need system administrator access in Salesforce. If none of the standard profiles are right for some users, you can create new profiles.

Roles

Roles determine what data users can see. Roles are part of a hierarchy. Users at the top of the hierarchy can see all data belonging to users below them. Users at lower levels can't see data owned by users above them, or in other branches. Each user can be assigned to only one role.

Assigning roles is optional. If your organization has many users, it might be easier to assign roles when adding users. However, you can set up a role hierarchy and assign roles to users at any time.

Add a Single User

Depending on the size of your organization or your new hire onboarding process, you may choose to add users one at a time. The maximum number of users you can add is determined by your Salesforce edition.

1. Read the guidelines for adding users.

2. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.

3. Click **New User**.

4. Enter the user's name and email address and a unique username in the form of a email address. By default, the username is the same as the email address.

   🛑 Important: Your username must be unique across all Salesforce orgs. The username must be in the format of an email address, for example, jane@salesforce.com. The email used for your username doesn't have to function. You can have the same email address associated with your account across multiple orgs. Remember: The username in the form of an email address must remain unique.

5. In Professional, Enterprise, Unlimited, Performance, and Developer Editions, select a `Role`.

6. Select a `User License`. The user license determines which profiles are available for the user.

7. Select a profile, which specifies the user's minimum permissions and access settings.

8. If your organization has Approvals enabled, you can set the user's approver settings, such as delegated approver, manager, and preference for receiving approval request emails.

9. Check `Generate new password and notify user immediately` to have the user's login name and a temporary password emailed to the new user.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Contact Manager**, **Essentials**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions

USER PERMISSIONS

To create users:
- Manage Internal Users

Add Multiple Users

You can quickly add up to 10 users at a time to your organization. Your Salesforce edition determines the maximum number of users that you can add.

1. From Setup, enter *Users* in the `Quick Find` box, then select **Users**.

2. Click **Add Multiple Users**.

3. If multiple user license types are available in your organization, select the user license to associate with the users you plan to create. The user license determines the available profiles.

4. Specify the information for each user.

5. To email a login name and temporary password to each new user, select **Generate passwords and notify user via email**.

6. Click **Save**.

7. To specify more details for the users that you've created with this method, edit individual users as needed.

FINE-TUNE PRE-EXISTING FEATURES

Overview

Your Salesforce organization is highly customizable. In this chapter, learn how to tweak pre-existing features to make Salesforce work better for your business.

Pre-existing features in Salesforce are called *standard objects*. Each standard object contains *standard fields* used to store data. Your users can easily access most standard objects by clicking one of the *tabs* on any page of your Salesforce organization.

> **Note:** For example, the standard object *Accounts* has a standard field called `Account Name`. Your users can access your company's accounts by clicking the *Accounts* tab in Salesforce.

You can't delete standard objects or fields, but you can change them to better suit your business's needs.

Change Tab and Field Names
You can change the name of almost any object, field, or tab in Salesforce. This simple adjustment lets you continue using the terminology your users already know and helps them transition to using Salesforce. However, be aware that Setup and Salesforce Help always display the original names for standard objects, fields, and tabs.

Replace Picklist Choices
If our standard picklist choices aren't right for your business, you can change them.

Log Changes to Your Data
You can set up Salesforce to track changes your users make to most fields on many standard objects, including Accounts, Contacts, Leads, and Opportunities.

Change What Your Users See
You can't delete standard fields, but you can hide them from your users by removing them from the page layout. You can also add page elements, change the order they're displayed, require data in certain fields, and make other tweaks to what users see.

Change Tab and Field Names

You can change the name of almost any object, field, or tab in Salesforce. This simple adjustment lets you continue using the terminology your users already know and helps them transition to using Salesforce. However, Salesforce Help and most pages in Setup always display the original names for standard objects, fields, and tabs.

For example, you can change the name label for the "Accounts" object and related "Accounts" tab to "Companies", and change the field "Account Name" to "Company Name." When you rename an object, tab, or field, the new name appears on all pages the user sees, in Salesforce for Outlook, and in Connect Offline.

1. From Setup, enter `Rename Tabs and Labels` in the `Quick Find` box, then select **Rename Tabs and Labels**.

2. Select your default language from the `Select Language` drop-down list at the top of the page.

   > **Note:** In Hebrew, we recommend keeping tab renaming to a minimum because variable gender in verbs is not supported and verbs can lose gender agreement.

3. Click **Edit** next to the tab you want to rename. Click **Reset** to revert to a tab's original name.

   > **Note:** You can't reset custom object tab names.

4. Enter the singular and plural forms of the new tab name. Also, if applicable for the language, select **Starts with a vowel sound** for labels that start with a vowel to ensure that Salesforce uses the proper article (such as "a" or "an"). Then click **Next**.

   When you rename a tab or an object, you can't use the name of another standard tab, custom object, external object, or custom tab.

5. Enter your labels for the standard field labels and other user interface elements. Be sure to enter both a singular and plural form for each label that requires it. Select **Starts with a vowel sound** for labels that start with a vowel.

   📝 Note: Some standard fields, such as `Created By` and `Last Modified By`, are purposely omitted from renaming because they track system information.

6. Click **Save**.

If you've created any reports, dashboards, user profiles, permission sets, custom fields, or list views using the tabs or fields you renamed, be sure to update them.

Replace Picklist Choices

If our standard picklist choices aren't right for your business, you can change them.

To update a picklist:

1. Navigate to the fields area for your object.

2. In the Custom Fields & Relationships related list, click the name of the picklist field to update.

3. In the Values section, click **Edit** next to a value.

4. Change the value's name, and optionally make the value the default for the master picklist.

5. Assign a color to use in charts by clicking the 🎨 button and selecting how to assign colors to values.

   - **Assign fixed colors to all values** assigns a fixed color to each value from the standard set of chart colors. The Chart Colors column shows the assigned colors. For example, if you want Closed Lost values always to be red in charts grouped by Opportunity Stage, assign red to that picklist value.

   - **Assign colors to values dynamically** assigns colors when a chart is generated. For example, if you need only certain picklist values to have fixed colors in charts, manually assign colors to those values and leave the rest to be assigned dynamically.

   📝 Note: Chart colors aren't available for multi-select picklists, currency picklists, or Task Subject, Event Subject, Knowledge Validation Status, and Opportunity Competitor picklists.

   💡 Tip:
   - If you use record types, changing the default value of the master picklist doesn't affect the default value of the picklist for a record type.
   - For Ideas, setting the default value of the Categories or Status picklists doesn't affect the default value on the Ideas pages.
   - If you change the label for a picklist value that's used as a filter criterion, the picklist value is automatically removed from the filter criteria. For example, if your report contains a filter where `Lead Source equals Email or Web` and you change the picklist value Web to Referral, your report filter changes to `Lead Source equals Email`. If the changed picklist value was the only value specified for a particular filter, it continues to show up in your filters, but an error appears.

6. Click **Save**.

7. To make the picklist required (if it's not already), click **Edit** at the top of the detail page, and check **Always require a value in this field in order to save a record**.

8. To change the picklist from unrestricted to restricted or vice-versa, adjust the **Restrict picklist to the values defined in the value set** setting.

9. To open an easy-to-print list of your picklist values, click **Printable View**.

Log Changes to Your Data

Set up Salesforce to track changes your users make to most fields on many standard objects, including Accounts, Contacts, Leads, and Opportunities.

When you select fields to track in the Accounts, Contacts, Leads objects, or in certain other standard objects, entries are added to the History related list for each tracked field every time that field is modified. All entries include the data, time, nature of the change, and who made the change.

1. From Setup, click **Customize** and select an object.

2. Click **Fields**.

3. Click **Set History Tracking**. Then, select the option to enable field history tracking. For example, for Accounts, select **Enable Account History**.

4. Choose up to 20 fields you want tracked.

    Salesforce can't track the **Created By** or **Last Modified By** fields; formula, roll-up summary, or auto-numbered fields; or **Expected Revenue** field on Opportunities.

5. Click **Save** to start tracking changes. Changes made before you save aren't included in field history tracking.

6. Change the page layout for the object to add the object's field history related list. For instructions, see Change What Your Users See.

Change What Your Users See

You can't delete standard fields, but you can hide them from your users by removing them from the page layout. You can also add page elements, change the order they're displayed, require data in certain fields, and make other tweaks to what users see.

1. Go to the management settings for an object.

2. Complete one of the following.

    a. For Enterprise, Unlimited, Performance, and Developer Edition organizations, go to Page Layouts, then click **Edit** next to the page layout that you want to change.

    a. For all other editions, go to Page Layouts.

3. In the page layout editor, select a category to which the element you're editing belongs from the left column. For example, if you're adding the Account History related list to the Account object, select **Related Lists**.

4. Complete one of the following.

    a. To add an element to the page, drag it form the palette to the page layout. For example, if you're adding the Account History related list to the Account object, click Account History and drag it to the Related List section of the page layout.

    b. To remove an element, drag it from the page to the palette.

    c. To require data in a field, or to make a field read-only, double click the field and select **Required** or **Read Only**.

    d. To change sort order, column order, the columns displayed, or remove standard buttons from a related list, click 🔧 .

5. Click **Preview As...** and select a user profile to see what the new page layout looks like to a user assigned to that profile.

6. Click **Save**.

IMPORT YOUR DATA

Data Import Overview

Before you go live with Salesforce, import your org's data. You can complete this task by using the Data Import Wizard.

The Data Import Wizard transfers your data from an existing data file into your Salesforce org. Although other wizards are also available for importing into individual standard objects, we recommend using the Data Import Wizard because it allows you to import all your data at once, and it imports data into both standard objects and custom objects.

Before importing your data, it's important to take time to review your data storage needs, map your data to Salesforce objects and fields, and clean your data. A poorly executed import can create bad data, leading to loss of time or confusion in your organization.

Prepare to Import Data

Prepare to import your data by creating an export file, mapping your existing data to Salesforce fields, and cleaning your existing data.

IN THIS SECTION:

Create an Export File
Create a data export file that can be imported into Salesforce.

Prepare Your Data for Import
Before importing data, review your import file to make sure your data is up-to-date, accurate, and reportable. You might also need to change headers in your import file to make sure that your data is stored in the right place in Salesforce.

Create an Export File

Create a data export file that can be imported into Salesforce.

An export file contains all the information you want to import.

Your export file can contain a mixture of new records and updates to existing records. You choose how records are matched to avoid duplication. For example, you can choose to match accounts and contacts by name or by email address. If you choose to match by email address, then records already in Salesforce are updated if records in your imported data have the same email address. However, if records have the same name but different email addresses, the records remain separate.

You can import data from any source that can output data to a comma-delimited (.csv) file. Search the Salesforce Help for instructions on exporting data from any of these common source programs:

- Exporting from ACT!
- Exporting from LinkedIn®
- Exporting from Outlook
- Exporting from Other Data Sources
- Exporting from Salesforce

Prepare Your Data for Import

Before importing data, review your import file to make sure your data is up-to-date, accurate, and reportable. You might also need to change headers in your import file to make sure that your data is stored in the right place in Salesforce.

> **Tip:** Watch a Demo: ▶ Cleaning Up Your Import File (English only)

Clean Your Data

Your Salesforce data will be replaced with data from your import file, even if it's out of date. Importing duplicate, inaccurate, or old data will cause reports to be inaccurate, and can cause your coworkers extra effort to ensure that new records are entered correctly.

The cleaner the data you import, the better the quality of your reports.

Even if you are importing into a new Salesforce organization, you should still review your existing data and remove outdated or duplicate information. For example, you might need to remove information for old accounts or ensure that each contact is listed only once.

> **Tip:** Now is the right time to set standards for how data should be recorded. For example, you might establish a rule that the names of states in the United States must be abbreviated using the regular 2-letter postal abbreviation. Then, review the data in your import file and change any entries that don't meet the standards.

Map Your Data

Changing the field names in your export file to match existing Salesforce field names will help ensure that your data is automatically mapped to the correct fields when it's imported. You can do this by opening your export file in Microsoft® Excel® and changing the column headers for each column of data to name of the Salesforce field you want the data imported into.

- When importing into a custom object, use the field labels shown on the custom object detail page in Salesforce as the column labels in your import file. If you created any universally required custom fields, you must include these fields in your import files or the import will fail.

- If you're importing account and contact data generated by Outlook or ACT! you don't need to change the field names.

- Refer to the Salesforce Field Reference Guide in the Salesforce Help for field names for common Salesforce objects, including Account, Contact, and Lead.

Import Data

Ensure your data is ready for import, then select the appropriate import wizard and import your data into Salesforce.

IN THIS SECTION:

Choose an Import Method
Usually, you can use the Data Import Wizard to import data into your org. However, in some cases, you might need to select a different import wizard or import product.

Test First
Before you import your all of your organization's data, it's a good idea to first import a small set of your data as a test. This will allow you to ensure that your data is fully prepared, and to verify in Salesforce that your data has been imported as expected. After you've imported your sample data and verified its accuracy, be sure to delete the sample data before proceeding with your real import.

Import Data with the Data Import Wizard
Use the Data Import Wizard to import data into Salesforce.

Choose an Import Method

Usually, you can use the Data Import Wizard to import data into your org. However, in some cases, you might need to select a different import wizard or import product.

- Use the Data Import Wizard if you're importing 50,000 or fewer records for business accounts, contacts, leads, custom objects, and solutions.
- If your org uses person accounts, use the individual Import My Person Accounts wizard to import 50,000 or fewer person account records. See the Salesforce Help for instructions.
- If you need to import data into other objects, or if you need to import more than 50,000 records, you may need to use the Data Loader or a third-party app. See Deciding on A Method for Importing Data in the Salesforce Help for more information.

Test First

Before you import your all of your organization's data, it's a good idea to first import a small set of your data as a test. This will allow you to ensure that your data is fully prepared, and to verify in Salesforce that your data has been imported as expected. After you've imported your sample data and verified its accuracy, be sure to delete the sample data before proceeding with your real import.

> **Note:** If some groups in your business are already using Salesforce, it may be best to perform the data import after business hours to avoid confusion.

Import Data with the Data Import Wizard

Use the Data Import Wizard to import data into Salesforce.

These browsers support the Data Import Wizard:

- Google Chrome™ version 29 and later
- Mozilla® Firefox® version 23 and later
- Microsoft® Internet Explorer® version 9 and later
- Apple® Safari® version 5 and later

1. Start the wizard.

   a. From Setup, enter `Data Import Wizard` in the Quick Find box, then select **Data Import Wizard**.

   b. Review the information provided on the welcome page, then click **Launch Wizard**.

   You can also launch the Data Import Wizard from the Tools list on the object-specific home page.

   > **Note:** Users who aren't administrators can also access the Data Import wizard from their personal settings.

2. Choose the data that you want to import.

   a. To import accounts, contacts, leads, solutions, person accounts, or articles, click **Standard Objects**. To import custom objects, click **Custom Objects**.

   b. Specify whether you want to add new records to Salesforce, update existing records, or add and update records simultaneously.

   > **Note:** If you have workflows that add new objects when importing, selecting **add new and update existing records** fires them, but selecting **update existing records** doesn't.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To import data with the Data Import Wizard:

- Depends on what you're importing. See What permissions do I need to import records? in the Salesforce Help.

c. Specify matching and other criteria as necessary. Hover your mouse over the question marks for more information about each option.

d. Specify whether to trigger workflow rules and processes when the imported records meet the criteria.

e. Specify the file that contains your data.

Specify your data file by dragging the CSV file to the upload area of the page. You can also click the CSV category you're using and then navigate to the file.

f. Choose a character encoding method for your file. Typically, you don't change your character encoding.

g. Select comma or tab as a value separator.

h. Click **Next**.

3. Map your data fields to Salesforce data fields.

The Data Import wizard maps as many of your data fields as possible to standard Salesforce data fields. But if the wizard can't map fields, you must do it manually. Unmapped fields are not imported into Salesforce.

To see a list of standard Salesforce data fields, from the management settings for the object, go to the fields area.

a. Scan the list of mapped data fields and locate the unmapped fields.

b. Click **Map** to the left of each unmapped field.

c. In the Map Your Field dialog box, search and choose up to 10 Salesforce fields to map to and click **Map**.

> 📝 Note: You also have the option of saving data from unmapped fields in a general notes field for accounts and contacts. Choose **Account Note** or **Contact Note** from the Map To dropdown list and click **Map**.

d. To change mappings that Salesforce performed automatically, click **Change** to the left of the appropriate field. Delete the Salesforce fields you don't want to map, choose the fields you want to map, then click **Map**.

e. Click **Next**.

4. Review and start your import.

a. Review your import information on the Review page. If you still have unmapped fields that you want to import, click **Previous** to return to the previous page and specify your mappings.

b. Click **Start Import**.

5. Check import status.

The **Recent Import Jobs** chart on the Data Import Wizard home page lists the status and metrics of the data import. Alternately from Setup, enter `Bulk Data Load Jobs` in the Quick Find box, then select **Bulk Data Load Jobs**.

> 📝 Note: The Bulk Data Load Jobs page is not available in Professional Edition. Only administrators have access to the Bulk Data Load Jobs page in Salesforce Setup. If you're not an administrator, you can check the status of your upload by monitoring the relevant tabs in Salesforce.

Validate Your Imported Data

Before proceeding, spot-check your imported data to make sure that data was imported into the desired fields.

Review several records from each object. Make sure you can answer yes to each of the following questions.

- Was the data imported into the correct fields?
- Was all the data imported for each record?

- Is the record linked to its related records? For example, check that all contacts on an account show up on the account's Contacts related list.

SET UP BASIC REPORTING

Overview

Reports give you access to data you've collected over time so that you can make more informed decisions. You can examine your company's data in almost infinite combinations, display it in easy-to-understand formats such as graphical dashboards, and share it with others.

Reports

A *report* organizes data you've selected into rows and columns. You can summarize, filter, and group report data.

You can view a report on any data that you have access to. When other users view reports you've shared, they see only data they have access to. Users who can access more records can see more data in their reports. Generally, you can report on data owned by you and on data owned by users below you in the role hierarchy.

Dashboards

A *dashboard* displays your report data visually as a graphic or chart. Dashboards help you summarize your data in a glance. They're based on reports.

Salesforce has already set up a few reports and related dashboards for you. You can change existing reports and dashboards or set up new ones that better suit your business needs, and you can share them with others. Coworkers can set up more reports and dashboards at any time.

> 💡 Tip: Before you jump into reports and dashboards, we recommend completing our online tutorial to learn how reports and dashboards work, and how to work with them. It takes about half an hour.
>
> Access the Training: ▶ Get Started With Reports and Dashboards

Get Started with Reports

To view the reports Salesforce has already set up for you, click the Reports tab.

If you need more reports, you can set them up by either creating a report, or copying and altering an existing one. When you create a report from scratch, you start by selecting a report type. You can't change the report type after the report is created. When you create a report based on an existing report, the new report uses the same type as the one it's created from.

Report Type

Each report is based on a *report type*. The *report type* determines the records included in the report. For example, if you select the *Accounts and Contacts* report type, your report includes record data only for account and contacts. Salesforce provides many standard report types. Administrators can create more as needed.

IN THIS SECTION:

Create and Customize a Report

You can create a report from scratch, or by copying and customizing an existing report.

Run a Report

Click the Reports tab, then click the name of the report. Most reports run automatically when you click the name.

Create and Customize a Report

You can create a report from scratch, or by copying and customizing an existing report.

1. Create a report.

   a. To create a report from scratch, on the Reports tab, click **New Report**. Select a report type, then click **Create**.

   b. To create a report from an existing report, on the Reports tab, open the existing report you'll base your new report on. Click **Customize**, then click **Save As** to save it as a new report.

2. Use the Report Builder to customize your report.

   Watch a Demo: ▶ Getting Started with Report Builder (Salesforce Classic)

3. Optionally, click **Run Report** to preview your report.

4. Click **Save**. If you plan to share the report, save it in a folder you'd like to share.

Run a Report

Click the Reports tab, then click the name of the report. 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.

If you don't see any data, try changing the report to avoid one of these common problems.

- If the report runs but doesn't return any data, it's possible that your filter criteria may not include any records, or includes only records that you don't have access to.

- If your report returns more than 2,000 records, only the first 2,000 records are displayed. Click **Export Details** to see the complete report.

- If your report takes more than 10 minute to run, Salesforce cancels the report. Reduce the amount of data the report includes by changing the filters, scope, level of detail, or number of columns so the report runs more quickly.

Get Started with Dashboards

Click the Dashboard tab to view the dashboards that Salesforce has already set up for you.

You can quickly download and install a variety of popular dashboards from the Salesforce AppExchange. If you need more dashboards, you can create new ones based on existing reports.

IN THIS SECTION:

Install the CRM Sample Dashboards from AppExchange

Use these dashboards from the AppExchange as a starting point for building dashboards that meet your business needs.

Create a Dashboard

If you need more dashboards, you can create them based on your reports, or on reports shared with you, using the drag-and-drop Dashboard Builder.

Install the CRM Sample Dashboards from AppExchange

Use these dashboards from the AppExchange as a starting point for building dashboards that meet your business needs.

The CRM sample dashboards package from AppExchange offers best-practice dashboards with underlying reports that are based on your organization's standard objects and fields. You can use these sales, marketing, service, and support dashboards to track business processes and key performance metrics for yourself, your team, and your company. Dashboards in this package include:

- **Sales & Marketing Dashboards**
  - Marketing Executive Dashboard
  - Sales Executive Dashboard
  - Sales Manager Dashboard
  - Salesperson Dashboard

- **Customer Service Dashboards**
  - Agent Supervisor Overview Dashboard
  - Service Executive Overview Dashboard
  - Service KPIs Dashboard

1. In AppExchange, search for "Salesforce CRM Dashboards" and click **Get It Now**.

2. To install the sample dashboards, install the package.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Group** (View Only), **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in: both Legacy Folder Sharing and Enhanced Folder Sharing

USER PERMISSIONS

To install packages:
- Download AppExchange Packages

Create a Dashboard

If you need more dashboards, you can create them based on your reports, or on reports shared with you, using the drag-and-drop Dashboard Builder.

1. On the Dashboards tab, click **Go to Dashboard List**.

2. Click **New Dashboard**.

3. Customize your dashboard using the Dashboard Builder.

   Watch a Demo: ▶ An Overview of Dashboards (Salesforce Classic)

4. Click **Save**. If you plan to share the dashboard, save it in a folder you'd like to share.

Share Reports and Dashboards

To let coworkers access a report or a dashboard you own, share the folder where you saved it. You can share folders with individual coworkers, public groups, or roles in the user hierarchy.

You can manage any folder you've created, along with the reports and dashboards stored in them. Unless you share a folder, only you and other users with administrative permissions can see it.

Share a report or dashboard folder with individual coworkers:

1. On the Reports tab, click **Sharing Settings** on a folder.

2. Select **Internal Users**.

3. Find a coworker typing part of a name.

4. Click **Share**, then choose an access level.

5. After you've finished selecting coworkers to share a folder with, click **Done**.

You can find instructions for sharing folders with public groups or roles in the user hierarchy in the Salesforce Help.

ROLL SALESFORCE OUT

Best Practices for a Successful Rollout

For a successful Salesforce implementation, it's important to plan your rollout to users. Here are some general guidelines.

Communicate Your Schedule

Decide on the date your users will start using Salesforce early in the process. Communicate your roll-out plans and go-live date to your users, so they know what to expect.

Activate Your Users' Accounts

If you didn't send login information to your users when you added them, prepare to send it as part of the roll-out process.

To have login information sent automatically, from Setup, enter `Users` in the `Quick Find` box, then select **Users**, select all the users who need login information, and click **Change Password** .

Train Your Users

Set up a time to train your users. You may need to prepare different training for each type of user. Each user will need to know how to log in. Your users will feel more comfortable with Salesforce once you've shown them how to complete each of their critical job functions. But remember, changes your users make during training are real changes to your data, so plan ahead to ensure that training activities don't impact your business.

Provide Users With Resources

Handy resources for users may include Salesforce Help articles, videos, workbooks, online training, and success communities. Point your users to these resources so they can learn on their own. See the Resources list for some ideas.

We also offer a PDF guide that helps users learn about common terminology, features, and functions in Salesforce. Learn Salesforce Basics is for everyone, users and administrators included.

Gather Feedback

Let your users know how you'd like them to communicate issues, suggestions, or requests to you.

AFTER YOU IMPLEMENT SALESFORCE

Set Up More Salesforce Features

Make Salesforce work even better for your company by diving into some more complex features.

Download and review Enhance Your Sales Cloud Implementation to learn more about securing your data, automating processes, and customizing Salesforce.

Stay Current with Salesforce

What It Is	Why You Need It	Where to Find It
Release Notes & Release Resources	Salesforce typically releases software updates and new features about three times annually, in the spring, summer, and winter.	View the most recent Salesforce release notes at http://docs.releasenotes.salesforce.com/
Salesforce Online Help	Online help is updated with each release to ensure that you can always find the most current information about features and services you use.	http://help.salesforce.com
Salesforce Success Communities	Success Communities connect you with other Salesforce customers, partners, and experts. Here, you can ask and answer questions about Salesforce, or review past questions and discussions for tips, tricks, and answers to make better use of Salesforce.	Visit http://w.salesforce.com and click Community.
Salesforce Trailhead	Trailhead provides administrators and developers with self-paced guided learning pathways through the key features of Salesforce using a set of online, interactive tutorials. New trails are added frequently.	Visit https://trailhead.salesforce.com
Training Classes	Salesforce University offers training classes to help you and your users develop expertise and expand knowledge in administering and using Salesforce.	Visit http://help.salesforce.com and click Help & Training.
Dreamforce	Want to know where the industry is headed and how your company can use Salesforce to get there first? Dreamforce is four high-energy days of innovation, fun, and giving back. It's your chance to learn from industry visionaries, product experts, and	http://dreamforce.salesforce.com

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	world leaders who can help you transform your business and your life.	

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