Salesforce Enterprise Edition Upgrade Guide

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OVERVIEW OF FEATURES

Enterprise Edition gives you more control and flexibility with additional powerful features, including:

Custom Profiles and Permission Sets
Control permissions and functional privileges.

Multiple Page Layouts and Field-Level Security
Personalize different pages for different teams and restrict access to sensitive information.

Multiple Business Processes and Record Types
Customize picklist values based on division or workgroups.

Workflow Automation
Automate your internal business processes and send real-time alerts.

Approval Processes
Take automating your internal business processes one step further by specifying a sequence of steps that are required to approve or reject submitted records.

Delegated Administration
Assign limited administrative privileges to selected non-administrator users in your organization.

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Manage relationships with customers who are individual consumers rather than companies.

Team Selling and Account Teams
Track sales and account management efforts for a team of reps with different roles.

Record Sharing
Expand a private sharing model to allow granular sharing of records on an individual basis.

Territory Management (available with the Sales Cloud)
Expand a private sharing model on accounts, so users have access to accounts that meet specified criteria.

Additional Security Features
Control login hours and IP ranges for users and prevent IP shifting, and manage password policies.

Group-Based Access to Folders and Views
Provide folder and list view privileges to groups, users, or your entire organization. Control access to folders and list views.

Force.com Connect Offline
Enable users to work completely unplugged, remotely updating data from the field.

Force.com Data Loader
Download and use a client application that allows you to add, update, delete, or export any type of Salesforce record.

Integration with Back-Office Systems
Integrate data with other business critical applications like ERP, HR, or a data warehouse.

Key Benefits of Enterprise Edition

Upgrading to Enterprise Edition provides:

Customization for multiple divisions

Customize the application to suit the needs of your different divisions, make options available to different groups, make certain fields required for different types of records.

Greater administrative control

Control user permissions with more flexibility and monitor resources using more powerful tools.

Mobile access

Users can be more productive on the road through the same easy-to-use interface that they see online.

Integration

Make Salesforce the single source of information for your users by integrating with back-office systems.

About This Guide

Plan your implementation of each feature carefully before you make them available to your users. This document includes the following sections to walk you through the setup process and make your implementation a smooth transition for users.

Planning

Determine how you want to implement each feature.

Implementation

Customize Salesforce based on your organization's policies and procedures.

Tips for Training Users

Plan what to teach your users about each new feature.

Because this document is part of a suite of user guides for Salesforce, expect to see references to other documents that contain more detailed information.

PLANNING

The topics listed below include information about each feature to help you determine:

- Whether to implement the feature
- How to implement the feature
- What you need to know to implement it right the first time

Plan your implementation of all the new features carefully to make sure you are meeting your business needs and getting the most out of Enterprise Edition. Follow the checklists in each section to make sure you have all the information you need prior to implementing each feature.

- Custom Profiles and Permission Sets
- Multiple Page Layouts and Field-Level Security
- Console Tab
- Multiple Business Processes and Record Types
- Workflow Automation
- Approval Processes
- Delegated Administration
- Person Accounts
- Team Selling and Account Teams
- Sharing Records
- Territory Management
- Additional Security Features
- Group-Based Access to Folders and Views
- Force.com Connect Offline
- Force.com Data Loader
- Back Office Systems

Custom Profiles and Permission Sets

Create custom profiles and permission sets to grant permissions to your users. Before granting users additional privileges, consider each of the following questions to formulate the best implementation plan for your organization:

Do you want to remove certain permissions from standard users?
Examine the Standard User profile and the permissions it grants users. You can clone this profile and remove individual permissions.

Should you use profiles or permission sets to grant permissions?
It's a good idea to use profiles to assign the minimum permissions and access settings for specific groups of users, then use permission sets to grant additional permissions. Because you can assign many permission sets to users and permission sets are reusable, you can distribute access among more logical groupings of users, regardless of their primary job function. For example, you could create a permission set that gives read access to a custom object and assign it to a large group of users, and create another permission set that gives edit access to the object and assign it to only a few users. You can assign these permission sets to various types of users, regardless of their profiles.

Some profile settings aren't included in permission sets. The following table shows the types of permissions and access settings that are specified in profiles and permission sets.

Permission or Setting Type	In Profiles?	In Permission Sets?
Assigned apps	✅	✅
Tab settings	✅	✅
Record type assignments	✅	✅
Page layout assignments	✅	
Object permissions	✅	✅
Field permissions	✅	✅
User permissions (app and system)	✅	✅
Apex class access	✅	✅
Visualforce page access	✅	✅
External data source access	✅	✅
Service provider access (if Salesforce is enabled as an identity provider)	✅	✅
Custom permissions	✅	✅
Desktop client access	✅	
Login hours	✅	
Login IP ranges	✅	

How many permission sets or new profiles do you need?
List the permissions you want each group of users to have.

Do you want different users to see different information on pages?
For example, do you want some users to see less information about accounts than executives?

Do you want to control how users access and upgrade desktop clients?
For example, do you want to prohibit some users from using clients such as Salesforce for Outlook? Do you want to enforce timely updates to new client versions?

💡 Tip: Try to limit the number of custom profiles because maintaining them can be time consuming.

SEE ALSO:

Creating and Assigning Custom Profiles and Permission Sets

Multiple Page Layouts and Field-Level Security

Multiple page layouts allow you to create different views of your detail and edit pages for different groups of users. Field-level security allows you to restrict users' access to certain fields by making those fields visible, hidden, editable, or read only. Record types enable you to display different page layouts based on some attribute of the record.

To simplify maintenance of page layouts, first use field-level security to restrict the access your users have to fields. Next, customize record types to make picklists function differently for different users. Then, create additional page layouts to organize the information displayed on detail and edit pages.

Before you begin, determine if you want to use field-level security, multiple page layouts, or a combination using record types.

Do you want to hide fields?

- If you want to make the field completely inaccessible to a user, use field-level security.
- If you want the field to be hidden on page layouts but visible in reports, list views, search results, related lists, and communication templates, use page layouts to make the field hidden.

Do you want your pages to look differently?

- If you want selected users to always see the same page layout that is designed for them, create separate page layouts that are assigned to different users based on profile.
- If you want the same person to see different views of the page depending on an attribute of the record, use record types on page layouts.

For example if have accounts for partners and customers, create two new record types named "Customers" and "Partners." Then create a separate page layout for each and assign the account record type for customers to the customer page layout. Likewise, assign the account record type for partners to the partners page layout. Then users can see the page layout you designed for customers on those accounts that have the "Customer" record type.

Consider each of the following points to formulate your plan for implementing multiple page layouts:

- Identify fields to hide from selected users.
- Determine the fields each user should see.
- Determine which users could share a page layout.
- Name the different page layouts you plan to create, for example: by business department.
- Identify which fields should be editable, read only, or required on each page layout.
- Identify which related lists should be on each page layout.
- Identify which custom links that you want on each page layout.

SEE ALSO:

    Creating Multiple Page Layouts and Setting Field-Level Security

Console Tab

The console is a tab that combines a list view and related records into one screen with different frames so that users have all the information they need when interacting with Salesforce. By using the console, users can quickly find, view, and edit records such as cases, accounts, and contacts with fewer clicks and without switching back and forth between screens. Administrators choose the information displayed in the console to accommodate varied and evolving business needs.

💡 **Tip:** The Salesforce console is different from the Console tab. It improves on the Console tab by displaying records and related items as tabs on one screen.

Consider the following before implementing the Console tab:

Do you have groups that use Salesforce more than three hours a day?
If so, set up the console to help users dramatically speed up business functions.

Do you have users who view Salesforce while speaking with customers on the phone?
If so, configure the console so that users can view all of a customer's related information on one screen.

Do you have groups that work through list views sequentially?
If so, set up the console so that users can simultaneously see list views and record details without having to switch back and forth between screens.

Do you have users that navigate between related Salesforce screens to retrieve information?
If so, the console allows you to assemble related information on one screen to make your users more efficient.

Multiple Business Processes and Record Types

Multiple business processes allow you to control the workflow your users follow for leads, opportunities, and cases. For example, you can set up different opportunity stages for different sales departments or different case status values for different types of cases.

Sales Processes
Available for the opportunity `Stage` picklist values

Support Processes
Available for the cases `Status` picklist values

Lead Processes
Available for the lead `Lead Status` picklist values

Record types contain sales processes, support processes, and lead process. They also allow you to control which values a user sees for any picklist field. If you want different groups of users to see only a subset of values in any picklist field, consider using record types. For example, if your software opportunity team should never handle accounts from industries outside of the computer industry, you can create an account record type for your software sales reps that offers them a subset of the list of values in the `Industry` picklist on accounts.

Consider the following before implementing business processes or record types:

Do you have different groups that follow different processes in sales or support?
You may just need two separate business processes if you have two divisions or two different processes. Make a list of the different business processes you want to support and give them each a name.

Do you want to make different picklist values available to different users?
If so, identify the picklist fields you want to control with record types. Make a list of the picklist values that should be available to what users.

Do you want to have different picklist value defaults for different users?
If so, identify the different default picklist values for different users.

Create a list of profiles to assign to each record type
Prepare a list of what profiles should have access to what record types. These record types contain business processes, which is how you can assign user profiles to business processes.

Determine which record types should be associated with each profile

> You can limit a user's access to record types or users can have more than one record type available to them when creating a record. Be prepared to choose a default record type whenever you apply more than one record type to a profile.

SEE ALSO:

> Setting Up Multiple Business Processes and Record Types
>
> Tips for Multiple Business Processes and Record Types

Workflow Automation

Your internal processes are critical to your success. Workflow allows you to automate your internal business processes and automatically perform workflow actions based on your organization's workflow. Using workflow, you can keep each member of your team informed of the latest changes to your data.

Workflow automation consists of the following basic attributes. Additional workflow actions are described in the Salesforce Help.

Workflow Alerts

> Workflow alerts are similar to email templates in that they contain the email message and list of recipients for an email. Workflow rules send workflow alerts whenever business actions trigger the rule.

Workflow Tasks

> Workflow tasks are like task templates that contain the information a workflow rule uses to assign a task to specified users whenever business actions trigger the rule.

Workflow Field Updates

> Workflow field updates change the value of a field to a specified value. Workflow rules apply the field updates whenever business actions trigger the rule.

Workflow Outbound Messages

> Workflow outbound messages send the information you specify to an endpoint you designate. Workflow rules send the messages whenever business actions trigger the rule.

Workflow Rules

> Workflow rules schedule and run workflow actions when records meet specified criteria. For example, automatically send an email alert to the account team of a high-value opportunity ten days before its close date, or assign follow-up tasks to a support representative when a case is updated.

Consider the following before creating workflow actions or rules.

What internal business processes do you want to automate in Salesforce?

> For workflow rules, you can create up to 50 per object. Then, you can associate each workflow rule with workflow alerts, tasks, field updates, and outbound messages. Determine what internal processes you want to automate for each type of record.

Determine what tasks you want to assign for each automated process.

> A workflow rule can assign up to 10 tasks when triggered. Determine what workflow tasks to assign when a workflow rule is triggered.

Determine the email alerts you want to send when a rule is triggered.

> A rule can trigger up to 10 email alerts. Workflow alerts can contain any number of Salesforce recipients and up to five additional recipients of users outside of Salesforce.

Determine the fields you want to update when a rule is triggered.

> A rule can trigger up to 10 field updates. Determine the fields you want changed and the values you want them to have when updated. Consider using formulas to calculate the new value of a field.

Determine if you want to send information to an external service when a rule is triggered.

A rule can trigger up to 10 outbound messages. Determine the information you want to send and the URL or endpoint that you want to receive it.

SEE ALSO:

Setting Up Workflow Automation

Approval Processes

Your business runs more efficiently with automated processes. For example, you may already have workflow rules that automatically send email alerts or assign tasks based on your internal processes. Approvals take automation one step further, allowing you to specify a sequence of steps that are required to approve a record.

An approval process is an automated process your organization can use to approve records in Salesforce. An approval process specifies the steps necessary for a record to be approved and who must approve it at each step. A step can apply to all records included in the process, or just records that have certain attributes. An approval process also specifies the actions to take when a record is approved, rejected, or first submitted for approval.

Approval processes consist of the following elements:

Approval Process Details

A name and description, entry criteria if you only want records with certain attributes to be included, a designated approver, and other settings to specify who, if anyone, can change a record once it has been submitted for approval.

Approval Process Steps

The sequence of actions to take when a record matches the criteria specified.

Initial Submission Actions

Additional actions that occur when a record is initially submitted for approval. These actions can be workflow alerts, tasks, field updates, or outbound messages.

Final Approval Actions

Additional actions that occur when a record is approved. These actions can be workflow alerts, tasks, field updates, or outbound messages.

Final Rejection Actions

Additional actions that occur when a record is rejected. These actions can be workflow alerts, tasks, field updates, or outbound messages.

Consider the following before creating approval processes.

What email template do you want to use for approval requests?

The email template you specify on an approval process is used when notifying users that an approval request is assigned to them.

Determine who should be the sender of approval requests.

The approval request notifications are automatically sent from the user who submitted the record for approval. You have the option to assign a different return email address to these notifications. Determine what email address to use.

Who will be responsible for approving requests?

Requests can be approved or rejected by any of the following: a manually chosen user or queue, a user or queue specified by the administrator, or a user listed in a custom hierarchy field on the user detail page.

Should approval requests be delegated to another user for approval?

An approval request can be approved by a designated delegate for the approver.

What records should be included in this process?

Determine what attributes a record must have to be included in your approval process.

SEE ALSO:

Setting Up Approval Processes

Tips for Processing Approval Requests

Delegated Administration

Use delegated administration to assign limited administrative privileges to selected non-administrator users in your organization. Review the following questions to determine your need for delegating setup tasks:

Do you have multiple departments with large number of users using Salesforce?

Rather than having one or two central administrators spend all of their time adding and updating users for every department, designate one user from each department as the delegated administrator for that department's users.

Do your administrators spend too much time resetting users' passwords?

The delegated administrator for every department can be in charge of resetting passwords, freeing up valuable time of your administrators.

Do you have custom objects that are used by only certain users?

For instance, your opportunity team may have a custom object to track expenses. You can designate one or two users from that team to be the delegated administrator for the expenses custom object.

SEE ALSO:

Setting Up Delegated Administration

Person Accounts

Person accounts are accounts that can function simultaneously as contacts. For example, you can send person accounts emails, invite them to meetings, and add them to marketing campaigns.

Review the following question to determine your need for person accounts:

Do you sell to individual consumers?

Does your business operate on a business-to-consumer model? By default, accounts in Salesforce are designed for a business-to-business model where accounts represent firms, corporations, and other business entities such as nonprofit organizations. To facilitate interactions with customers who are individual human beings, such as a person buying an insurance policy or a patient receiving medical care, consider implementing person accounts.

Team Selling and Account Teams

Your organization may already have roles for opportunity team members. Your sales reps may already work together on deals. Your account reps may coordinate efforts to support and maintain accounts. Team selling and account teams enable you to configure Salesforce to reflect the way your organization manages opportunity and account teams.

Team selling allows your users to identify a group of users and their roles on each opportunity. For example, an opportunity may have an account manager, sales engineer, and an executive sponsor. Each of the users on an opportunity team needs to share access to the

opportunity. Likewise, account teams allow your users to list account team members on an account that they all support together and can access. The account team members and opportunity team members share a list of role names.

Analyze opportunity team members

You may already have opportunity teams in place. Examine the roles that each person plays to create your list of opportunity and account team roles.

Analyze account team members

Maintaining an account may require several team members. Examine the roles that each person plays on your company's accounts.

SEE ALSO:

Setting Up Team Selling and Account Teams

Tips for Opportunity Teams

Tips for Account Teams

Sharing Records

Sharing allows you to share individual records with other Salesforce users, rather than having to share either all or none of the records in your organization.

Users can extend sharing of any of their accounts, campaigns, contacts, cases, leads, opportunities, or custom objects individually with other users. Depending on your sharing model, users may not need to extend sharing. Analyze your sharing model and how it applies to sharing.

Review the following to understand the options based on your sharing model and plan how to implement sharing:

Public Read/Write/Transfer

If you use a Public Read/Write/Transfer model for a type of record, users can already view, edit, and transfer records to other users regardless of owner. So, individual record sharing is not necessary using this organization-wide sharing model. This option is only available for leads and cases.

Public Read/Write

If you use a Public Read/Write model for a type of record, users can already view and edit any record regardless of owner. So, individual sharing of records is not necessary using this organization-wide sharing model.

Public Read Only

If you have a Public Read Only sharing model, users can extend read/write access to their records individually. Keep in mind that the users who are granted individual sharing access to a record must have at least read access to any associated records. For example, if you have a Public Read Only sharing model for accounts, all users can view accounts associated with the opportunities, regardless of who owns the account. This allows your users to share their opportunities individually without worrying about granting read access to the associated accounts.

Private

If you have a Private sharing model for a type of record, users can extend read or read/write access to their records individually.

Use sharing rules to automatically extend the sharing privileges of groups of users or users in a specific role. Consider the following before implementing sharing rules:

Evaluate your current sharing model

Sharing rules can only extend sharing privileges beyond your organization-wide sharing model.

Determine rules for sharing individual records

Determine which groups or roles need access to the records owned by users in other groups or roles.

Make a list of the groups you need
> Before you can create sharing rules, you must have groups, queues, or roles of users. Determine what groups you need to create for sharing.

SEE ALSO:
> Setting Up Record Sharing
>
> Tips for Manual Sharing

Territory Management

Territory management allows you to organize users and accounts into territories, where the users in a territory all share access to that territory's accounts. Accounts are automatically assigned to territories via rules that evaluate the attributes (such as zip code and industry) of each account.

Accounts can also be assigned manually to territories one by one. Review the following questions to determine your need for territory management.

Does your organization have a private sharing model for accounts?
> Territory management is designed for organizations that have a private organization-wide default access level for accounts. In such organizations, only the account owner and users above the account owner in the role hierarchy can view or edit an account. In conjunction, territory management is a flexible way to grant users read or read/write access to accounts regardless of who the account owner is or where the user is located in the role hierarchy. (Account ownership and the role hierarchy continue to function as they always have, but territory management adds another way of granting record access.)

> If your default access level for accounts is Public Read Only or Public Read/Write, then your users may already have the account visibility they require and you would not need territory management.

Does your sales force have a complex organizational structure?
> Territory management is ideal for sales organizations that have many teams of sales reps, different managers for industry-specific, regional, and international sales, cross-functional employees, and other complex specializations. However, if your sales organization is flat, such as thirty account executives who all report to the same manager, then you may not need the capabilities that the territory hierarchy provides.

Does your sales organization change frequently?
> Territory management is a good choice if your sales organization regularly undergoes reorganizations, additions, and attrition. Territory management supports moving users between territories, adding new users to territories, removing users from territories, and choosing how accounts and opportunities are reassigned when moves occur.

For instructions on enabling and implementing territory management, see " Territories, Accounts, and Opportunities," which is available from the Salesforce online help.

Additional Security Features

Enterprise Edition allows administrators to lock down and control access to Salesforce. Before using additional security features, evaluate the needs of your users.

When do your users need to log in?
> Is there a reason to lock users out at specific times? Plan the hours that you want to allow users to log in.

Do you know the IP numbers that your users use?
> If so, decide if you want to limit the IP addresses they use to log in. Be careful because this will limit their ability to access information remotely.

Do you want to lock IP addresses?

Determine if you want users to be tied to the IP address used when logging in.

Do you want to enforce password policies?

Determine what you want to restrict:

- Users' ability to reuse previous passwords

- Password length

- Password complexity

SEE ALSO:

Using Additional Security Features

Group-Based Access to Folders and Views

You may have folders and list views that you want to make available to a group of users. Enterprise Edition enables you to control access to folders and list views.

Consider the following points before implementing group-based folders and views:

Which groups of users need more or less access to email folders, report folders, document folders, dashboard folders, or list views?

Make a list of each group and give it a group name.

Which users belong in these groups?

Make a list of the users in each group you plan to create.

SEE ALSO:

Customizing Group-Based Access to Folders and Views

Force.com Connect Offline

Force.com Connect Offline enables users to take a "Briefcase" containing customer data with them when they are on the road. Force.com Connect Offline is available to all Enterprise Edition users, but you need to enable it for users before they can install it. We recommend making a list of all users that need to use Force.com Connect Offline before moving on to setup.

SEE ALSO:

Setting Up Force.com Connect Offline

Tips for Force.com Connect Offline

Force.com Data Loader

The Force.com Data Loader is a client application that you run locally on a computer to add, update, delete, and export records. It processes tens of thousands of records at a time.

Data Loader offers the following key features:

- An easy-to-use wizard interface for interactive use

- An alternate command-line interface for automated batch operations (Windows only)

- Support for large files with up to 5 million records

- Drag-and-drop field mapping

- Support for all objects, including custom objects

- Can be used to process data in both Salesforce and Database.com

- Detailed success and error log files in CSV format

- A built-in CSV file viewer

- Support for Windows XP, Windows 7, and Mac OS X

Back Office Systems

Using Enterprise Edition, integrate with your back-office systems via a SOAP API and downloadable Web Services Description Language (WSDL).

Use these tools to integrate Salesforce with your ERP purchasing, HR, data warehouse, and other enterprise applications:

- Use desktop tools to extract and transform data sets

- Build custom applications using the XML API

- Integrate your data with other proprietary data sources

You may already have your integration needs clearly defined. Either way, follow these preparation steps before beginning your integration:

Analyze your integration needs

Determine if your organization needs to integrate your Salesforce data with any of your back-office systems.

Review the API resources

Go to `wiki.developerforce.com/index.php/API` to review the Force.com API documentation, tool kits, and sample code.

SEE ALSO:

Integrating with Back Office Systems

IMPLEMENTATION

Use these step-by-step instructions and tips to implement any Enterprise Edition features listed below.

Creating and Assigning Custom Profiles and Permission Sets
Create and manage custom user settings for tabs, page layouts, and permissions.

Creating Multiple Page Layouts and Setting Field-Level Security
Control access to fields, related lists, and custom links.

Setting Up Multiple Business Processes and Record Types
Create customized sales, support, or lead business processes.

Setting Up Workflow Automation
Create workflow rules and actions to automate your internal processes.

Setting Up Approval Processes
Use this jump start guide to create a basic approval process.

Setting Up Delegated Administration
Define delegated administrators, specify the users and profiles that delegated administrators can manage, and delegate the administration of custom objects.

Setting Up Team Selling and Account Teams
Enable team selling and configure opportunity team roles.

Setting Up Record Sharing
Extend the opportunity sharing model and options.

Using Additional Security Features
Implement tighter security controls.

Customizing Group-Based Access to Folders and Views
Create groups and make folders and list views available to them.

Setting Up Force.com Connect Offline
Enable users to use Force.com Connect Offline.

Integrating with Back Office Systems
Extend and integrate your data using the SOAP API.

> 💡 **Tip:** If you have Enterprise Edition, you can create a complete single copy of your organization in a separate environment to test your customizations to make sure they function the way you expect before implementing them in your Salesforce organization. For details, see Create or Refresh a Sandbox in the Salesforce Help.

Creating and Assigning Custom Profiles and Permission Sets

In addition to the standard profiles included with Salesforce, you can create custom profiles and permission sets for more granular control over permissions and user access settings.

After creating and editing profiles or permission sets, assign users to them:

1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
2. Click the name of the user you want to assign a profile or permission sets to.

3. Do one of the following:

- To change a user's profile, click **Edit**, then select a profile.
- To assign permission sets, scroll to the Permission Set Assignments related list and click **Edit Assignments**.

SEE ALSO:

Custom Profiles and Permission Sets

Creating Multiple Page Layouts and Setting Field-Level Security

You may want your opportunity team to see a different view of the accounts page than your accounting team. You may also want to make certain fields required or read only. If so, customize the field-level security, then create a new accounts page layout, customize it to show only those fields accounting should see, and assign it to the profile for your accounting team.

Customizing Field-Level Security

Customize individual fields to be visible, hidden, editable, or read only.

Creating Additional Page Layouts

Design the new page layout.

Customizing Mini Page Layouts

Define mini page layouts if you plan to use the Console tab.

Defining Related Objects

Choose related objects from page layouts if you plan to use the Console tab.

Assigning Page Layouts to Profiles and Record Types

Give users access to the newly designed page layout depending on record type and profile.

SEE ALSO:

Multiple Page Layouts and Field-Level Security

Customizing Field-Level Security

All the fields displayed on your page layouts depend on a combination of your page layout and field-level security settings. Whichever has the more restrictive field access settings always applies. Field-level security also restricts users from viewing hidden fields in reports, list views, search results, related lists, and communication templates.

Define field-level security from a profile, permission set, or a particular field.

Creating Additional Page Layouts

Design page layouts for your users that include the fields, related lists, and custom links they need to see.

To create additional page layouts:

1. From the management settings for the appropriate object, go to Page Layouts.

2. Click **New**.

3. Optionally, select an existing page layout to provide the settings as a starting point.

4. Enter a name for the new page layout.

5. Click **Save**.

6. Click **Edit** to customize the new page layout.

7. To arrange items on the page, select the item and drag it to the desired location on the page layout.

8. Optionally, click **Preview** and choose a profile to view the page layout from the perspective of users with that profile.

9. Click **Save**.

Customizing Mini Page Layouts

If you plan to use the Console tab, you can customize mini page layouts for the records that appear in the mini view of the console. A mini page layout contains a subset of the items in an existing page layout.

To customize mini page layouts:

1. From your object management settings, find Page Layouts.

   - If you're using Salesforce Classic:

     - For standard objects, from Setup, enter an object name in the `Quick Find` box, then select **Page Layouts**.

     - For custom objects, from Setup, enter `Objects` in the `Quick Find` box, then select **Objects**. Next, click an object, and then scroll down to the Page Layouts area.

   - If you're using Lightning Experience, enter `Object Manager` in the `Quick Find` box, then select **Object Manager**. Next, click an object, and then scroll down to the Page Layouts area.

2. Click **Edit** next to a page layout name.

3. Click **Mini Page Layout**.

4. Select which fields and related lists will be displayed for this type of record in the mini view. For each related list you select, choose which fields to display in that related list.

5. Click **Save**.

Mini page layouts inherit record type and profile associations, related lists, fields, and field access settings from their associated page layout. The visible fields and related lists of the mini page layout can be further customized, but the other items inherited from the associated page layout cannot be changed on the mini page layout itself.

Defining Related Objects

If you plan to use the Console tab, you can choose which related objects appear in the mini view of the console. However, you can only choose objects with a lookup relationship on the primary object. For example, from the cases object, you can choose account and contact because cases have account and contact lookup fields.

To define related objects:

1. From the management settings for an object, and then click **Edit** next to a page layout name.

2. Click **Mini Console View**.

3. Select which records associated with the record in the detail view will be displayed in the mini view. You can only select objects if they are defined as lookup relationships and those lookup fields are included on the page layout.

4. Click **Save**.

For comprehensive information about setting up the console including console layouts, see the Salesforce online help.

Assigning Page Layouts to Profiles and Record Types

If you created additional page layouts, associate them with your existing profiles and record types to make them available to users.

To assign page layouts to profiles and record types:

1. From the management settings for the appropriate object, go to Page Layouts.

2. Click **Page Layout Assignment** to display a matrix showing the page layouts assigned to each profile. If you have enabled record types, this matrix shows the page layout for the combination of a record type and profile.

3. Click **Edit Assignment** to begin editing the matrix.

4. Click any page layout in the matrix to select it. Use CTRL-click or SHIFT-click to select more than one page layout at a time.

5. Choose a new page layout to assign to your selection using the drop down list box labeled Page Layout To Use.

6. Click **Save**.

> 💡 Tip: Use the same page layout for each record type column in the matrix.
>
> Use the Field Accessibility tables to verify users access to fields based on the interaction of page layouts and field-level security. From Setup, enter `Field Accessibility` in the `Quick Find` box, then select **Field Accessibility** and select the appropriate tab.
>
> Some users may have access to specific fields based on their permissions. For example, users with the "Edit Read Only Fields" permission can always edit read-only fields regardless of any other settings. These exceptions are not visible in the Field Accessibility tables.

Setting Up Multiple Business Processes and Record Types

Use multiple business processes and record types to make different picklist values available to selected users based on their profiles. Multiple business processes allow you to manage separate sales, support, and lead life-cycles:

Sales Processes
Make some or all of the opportunity `Stage` picklist values available to designated users.

Support Processes
Make some or all of the case `Status` picklist values available to selected users.

Lead Processes
Make some or all of the `Lead Status` picklist values available to selected users.

The steps to setting up multiple business processes and record types are:

Creating Business Processes
Give your new business process a name and select the picklist values to include in it.

Creating Record Types
Create new record types for different kinds of records, for example, Customer Support cases and IT Help Desk cases. For opportunities, cases, and leads, include the new business process in a record type.

Adding Record Types to Page Layouts

If you want the record type to be visible to users, add the Record Type field to the appropriate page layouts. Then users can both see and select the appropriate record type to use for each record.

SEE ALSO:

Tips for Multiple Business Processes and Record Types

Multiple Business Processes and Record Types

Creating Business Processes

Create multiple business processes for your sales, support, and lead life-cycles. Then include each business processes in a record type so that you can associate them with user profiles. Also, add the `Record Type` field to a page layout if you would like users to view or change them.

To create business processes:

1. From Setup, enter `Processes` in the `Quick Find` box, then select the appropriate link.

2. Click **New**.

3. Choose an existing business process to copy all the picklist values into the new business process. Select **Master** to copy all available values.

4. Enter a name and description of the new process.

5. Click **Save**.

6. Add the values you want included in this business process to the list of Selected Values. Move any values that you do not want included in this business process to the Available Values list.

7. For a support or lead process, choose a default value.

8. Click **Save**.

Creating Record Types

Each business process must belong to a record type. Once you have created multiple business processes, create a record type and select the business process you want to make available within each record type. Unlike business processes, record types can be associated with profiles. So, include your new business process in a record type so you can make it available to users based on their profiles.

Beyond sales, support, and lead processes, you can build separate lists of picklist values for any custom or standard picklist field. For example, make just the relevant account `Industry` picklist values available to your software sales reps, but make all of the account `Industry` picklist values available to the rest of your sales reps.

To create record types:

1. From the management settings for the appropriate object, go to Record Types.

2. Click **New**.

3. Select an existing record type to copy the settings into the new one. If this is your first record type, you can copy all the available picklist values by choosing **Master**.

4. Enter a name and description for the new record type.

5. For opportunities, cases, or leads, choose a business process to include in the new record type.

6. Check `Active` to activate the record type.

7. Check the `Enable for Profile` column for profiles that should have access to the record type. Also, check the `Make Default` column to make the new record type the default for any enabled profile.

8. Click **Next**.

9. Select a page layout to use when displaying records of this record type.

10. Click **Save**.

   The page displays all the custom and standard picklists for the data type. Any changes you make to these picklists only apply to the selected record type.

   Optional:

   - Click **Edit** next to any picklist that you would like to customize for the selected record type.

   - Choose a value from the Available Values list and add it to the Selected Values list. All selected values will be available in the new record type.

   - Select a default value. This may be required depending on the picklist.

   - Click **New**.

   💡 Tip:

   - If you do not want users to choose a record type when creating new records, add a single record type to each profile. The associated record type will automatically be applied when users create new records.

   - You do not need to create record types for all tabs. If you have created a record type on one tab, records on other tabs that do not have record types will continue to have the master picklists available. A master picklist includes all of the available values in a picklist. For example, if you do not create any account record types, all account records display all picklist values for each picklist field.

   - If you create a record type but do not assign it to any profiles, the application functions the same as it did before you created the record type; all picklist values are available to users creating or editing records regardless of their profiles.

   - Records that existed before you created a record type remain unchanged. Since they do not have a record type, all picklist values are available regardless of the user's profile. If necessary, change the record type of existing records manually because there is no mass update for record types.

Adding Record Types to Page Layouts

Record types do not display automatically on any page layouts until you manually add the `Record Type` field to the appropriate page layouts.

Setting Up Workflow Automation

Users with the "Customize Application" permission can create workflow rules and actions. Begin by creating workflow actions, such as tasks or field updates, and then associate them with workflow rules.

Creating Workflow Alerts

   Workflow alerts are like email templates that contain an email message and a list of recipients.

Creating Workflow Field Updates

   Workflow field updates change the value of a field to a value you specify.

Creating Workflow Outbound Messages

   Outbound messages send the information you specify to an endpoint you designate.

Creating Workflow Tasks
> Workflow tasks contain the information a workflow rule uses when it assigns a task.

Creating Workflow Rules
> Workflow rules schedule and run workflow actions when records meet your specified criteria.

SEE ALSO:

> Workflow Automation

Creating Workflow Alerts

Workflow alerts are like email templates that contain an email message and a list of recipients. When a record meets the conditions of a workflow rule, the rule sends any associated workflow alerts to designated recipients. You can create workflow alerts and then associate them with workflow rules.

To create a workflow alert:

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

2. Click **New Alert**.

3. Enter a description for the new alert.

4. Choose an email template for the alert to use.

5. Select the type of recipient and choose from the list displayed.

6. Enter up to five additional email addresses. These can be outside of Salesforce.

7. Click **Save**.

Creating Workflow Field Updates

Workflow field updates change the value of a field to a value you specify. When a record meets the conditions of a workflow rule, the rule updates any fields specified in an associated workflow field update. You can create workflow field updates and then associate them with workflow rules.

To create a workflow field update:

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

2. Click **New Field Update**.

3. Enter a description for the new field update.

4. Choose the object and field you want to update.

5. Specify the new field value. The available options depend on the type of the field. You can:

   - Choose a specific value and enter the value.
   - Choose a blank value if you want to make the field blank.
   - For record owners, choose the user to whom the record should be assigned. For case, lead, and custom object records, you can also choose a queue for this field.
   - Use a formula to calculate the new value based on the value of other fields, values, or expressions.
   - For checkboxes, choose `True` to select the checkbox and `False` to deselect it.
   - For picklists, select a specific value from the drop-down list, or choose to change the field's value to the value above or below it in the picklist.

6. Click **Save**.

Creating Workflow Outbound Messages

Outbound messages send the information you specify to an endpoint you designate. When a record meets the conditions of a workflow rule, the rule sends any associated outbound messages to designated endpoints. You can create workflow outbound messages and then associate them with workflow rules.

To create a workflow outbound message:

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

2. Click **New Outbound Message**.

3. Choose an object that has the information you want included in the message and click **Next**.

4. Enter a description for the new outbound message.

5. Enter an endpoint URL that you want to receive the message.

6. Select the Salesforce user to use when sending the message. The chosen user controls data visibility for the message that is sent to the endpoint.

7. Select `Include Session ID` if you want the Salesforce session ID included in the outbound message. Include the session ID in your message if you intend to make API calls and you do not want to include a username and password. Sending a username and password is less secure than sending a session ID.

8. Select the fields you want included in the message and click **Add**. The outbound message will send the selected fields and their values to the designated endpoint.

9. Click **Save**.

Creating Workflow Tasks

Workflow tasks contain the information a workflow rule uses when it assigns a task. For example, workflow tasks determine the subject, due date, status, and priority of a task generated by a workflow rule. You can create workflow tasks and then associate them with workflow rules.

To create a workflow task:

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

2. Click **New Task**.

3. Choose the type of task to create and click **Next**.

4. Select an assignee for the task.

5. Enter a subject for the task.

6. Choose a due date, status, and priority.

7. Check `Notify Assignee` to send an automated email to the assignee when the task is assigned. (This option is unavailable when user control over task assignment notifications is enabled.)

8. Enter any comments to add to the task.

9. Click **Save**.

Creating Workflow Rules

Workflow rules schedule and run workflow actions when records meet your specified criteria. Create workflow rules with the business conditions that you want to trigger certain actions. Then associate each workflow rule with the appropriate actions, such as email alerts, field updates, and tasks.

To create a workflow rule:

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

2. Click **New Rule**.

3. Choose the type of rule to create and click **Next**.

4. Enter a name for the new rule.

5. Set the evaluation criteria:

Evaluate the rule when a record is:	Description
created	Evaluate the rule criteria each time a record is created. If the rule criteria is met, run the rule. Ignore all updates to existing records. With this option, the rule never runs more than once per record.
created, and every time it's edited	Evaluate the rule criteria each time a record is created or updated. If the rule criteria is met, run the rule. With this option, the rule repeatedly runs every time a record is edited as long as the record meets the rule criteria. 📝 Note: If you select this option, you can't add time-dependent actions to the rule.
created, and any time it's edited to subsequently meet criteria	(Default) Evaluate the rule criteria each time a record is created or updated. • For a new record, run the rule if the rule criteria is met. • For an updated record, run the rule only if the record is changed from not meeting the rule criteria to meeting the rule criteria. With this option, the rule can run multiple times per record, but it won't run when the record edits are unrelated to the rule criteria. For example, suppose that for an opportunity record to meet the rule criteria, the opportunity probability must be greater than 50%. If you create an opportunity with a probability of 75%, the workflow rule runs. If you edit that opportunity by changing the probability to 25%, the edit doesn't cause the rule to run. If you then edit that opportunity by changing the probability from 25% to 75%, the edit causes the rule to run. With this last edit, the rule runs, because the record is changed from not meeting the rule criteria to meeting the rule criteria.

6. Select your rule criteria. For more information on selecting rule criteria, see the Salesforce online help.

7. Click **Save & Next**.

8. Add immediate actions to the rule:

- • Click **Add Workflow Action** in the Immediate Workflow Actions list.
- • Choose the type of action to associate with the rule, and define the action.

9. Add time-dependent actions to the rule:

- • Click **Add Time Trigger**.
- • Set the time trigger. If the workflow rule is in effect when this time occurs, the time trigger fires the workflow action.
- • Click **Save**.
- • Click **Add Workflow Action** in the Time-Dependent Workflow Actions list.
- • Choose the type of action to associate with the rule, and define the action.

10. Configure additional immediate or time-dependent actions and click **Done** when your changes are complete.

11. Activate the rule:

- • From Setup, enter `Workflow Rules` in the `Quick Find` box, then select **Workflow Rules**.
- • Click **Activate** next to the rule.

Setting Up Approval Processes

Users with the "Customize Application" permission can create approval processes, steps, and actions. Begin by creating workflow actions, such as tasks or field updates, and reviewing the Approval Process Checklist in the Salesforce Help.

To create a basic approval process:

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

2. Choose the type of object for the new approval process.

3. Click **Create New Approval Process** and choose **Use Jump Start Wizard** from the drop-down button.

4. Enter a name and unique name for the new process.

5. Optionally, choose an email template to use when notifying approvers that an approval request is assigned to them.

6. Select `Add Approval History Related List...` to update all the page layouts for this object to include a related list that allows users to submit approval requests and track them.

7. Enter filter criteria that records must match in order to be included in this approval process.

8. Select the assigned approver for approval requests created by this step:

- • `Let the submitter choose...` prompts the user to manually select the next approver.
- • `Automatically assign...` assigns the approval request to the user in the user custom field displayed in this option.
- • `Assign to...` assigns all approval requests to the same user or queue selected in this option.

9. Click **Save**.

10. Next, select approval actions and activate the approval process.

For information about common approval processes you can implement in your organization, see Sample Approval Processes in the Salesforce Help.

SEE ALSO:

Tips for Processing Approval Requests

Approval Processes

Setting Up Delegated Administration

Use delegated administration to assign limited administrative privileges to selected non-administrator users in your organization. Users need the "View Setup and Configuration" permission to be delegated administrators.

Defining Delegated Administrators

> Define groups of users who should have the same delegated administration duties. For example, you could have two or more users who share the administration for a particular department at your company.

Delegating User Administration

> Enable delegated administrators to manage users in specified roles and all subordinate roles, and to assign specified profiles to those users.

Delegating Custom Object Administration

> Enable delegated administrators to manage custom objects that have been created by an administrator.

SEE ALSO:

> Delegated Administration

Defining Delegated Administrators

Define delegated administration groups to specify groups of users who you want to have the same administrative privileges. These groups are not related to public groups used for sharing.

To define delegated administrators:

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

2. Click **New**.

3. Enter a group name.

4. Click **Save**.

5. Click **Add** in the Delegated Administrators related list to specify the users in this delegated group.

6. Click the lookup icon to find and add users to the group. The users must have the "View Setup and Configuration" permission.

7. Click **Save**.

Delegating User Administration

Enable delegated administrators to manage users in specified roles and all subordinate roles, and to assign specified profiles to those users.

To delegate user administration:

1. From the detail page of the delegated administration group, click **Add** in the Roles and Subordinates related list.

2. Click the lookup icon to find and add roles. Delegated administrators can create and edit users in these roles and all subordinated roles.

3. Click **Save**.

4. Click **Add** in the Assignable Profiles list.

5. Click the lookup icon to find and add profiles. Delegated administrators can assign these profiles to the users they create and edit.

6. Click **Save**.

Delegating Custom Object Administration

Enable delegated administrators to manage custom objects that have been created by an administrator.

To delegate custom object administration:

1. From the detail page of the delegated administration group, click **Add** in the Custom Objects related list.

2. Click the lookup icon to find and add custom objects. Delegated administrators can customize nearly every aspect of a custom object, including creating a custom tab for it.

3. Click **Save**.

> 📝 Note: Delegated administrators cannot customize the field-level security for any custom fields on the custom objects they manage. The custom fields they create are automatically set to visible and editable for all users. In addition, delegated administrators cannot modify or define any relationships for the custom object or set organization-wide sharing defaults.

Setting Up Team Selling and Account Teams

An opportunity team is a set of users that normally work together on sales opportunities. A typical opportunity team might include the account manager, the sales representative, and a pre-sales consultant.. Likewise, an account team works together to manage an account and uses the same member roles as opportunity teams.

To begin using opportunity teams and account teams, first set up Salesforce to store opportunity teams, account teams, or both. Then your users can build default opportunity teams, add opportunity team members to opportunities, and add account team members to accounts.

Enabling Team Selling

Activate team selling and make it available on opportunity page layouts.

Enabling Account Teams

Activate account teams and make them available on account page layouts.

Configuring Team Roles

Make the opportunity team roles that your organization uses available to your users.

Reassigning Multiple Team Member Roles

Manage the changes in your teams from a single place, affecting many records at a time.

SEE ALSO:

Tips for Opportunity Teams

Tips for Account Teams

Team Selling and Account Teams

Enabling Team Selling

The team selling feature is available to all Enterprise Edition organizations but it is not enabled automatically. An administrator must activate the feature.

1. From Setup, enter `Opportunity Team Settings` in the `Quick Find` box, then select **Opportunity Team Settings**.

2. Select `Enable Team Selling`.

3. Click **Save**.

4. Select the opportunity page layouts for which you would like to display the Opportunity Team related list.

5. Click **Save**.

Enabling Account Teams

The account team feature is available to all Enterprise Edition organizations but it is not enabled automatically. To activate the feature:

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

2. Click **Enable Account Teams**. This is a toggle option so it is only available when disabled.

3. Select the `Account Teams Enabled` checkbox.

4. Click **Save**.

5. Select the account team page layouts for which you would like to display the Account Team related list.

6. Click **Save**.

Configuring Team Roles

Each member of a team has a role to play in the sales process or account management process. For example, Account Manager and Sales Rep represent different opportunity team roles.

To configure the team roles that your organization uses:

1. Navigate to the Team Roles page.

    - For opportunity teams, from Setup, enter `Team Roles` in the `Quick Find` box, then select **Team Roles**.
    - For account teams, from Setup, enter `Account Teams` in the `Quick Find` box, select **Account Teams**, then click **Team Roles**.

2. Enable the roles your organization uses.

3. Click **Save**.

💡 Tip: If you change a role name, you can update all records that contain the old role name. From Setup, use one of the following options.

    - For opportunities, from Setup, enter `Replace Team Roles` in the `Quick Find` box, then select **Replace Team Roles**.
    - For accounts, from Setup, enter `Account Teams` in the `Quick Find` box, select **Account Teams**, then click **Replace Team Roles**.

Reassigning Multiple Team Member Roles

Your organization may need to make changes to teams on multiple records at a time. Using Salesforce, you can add, remove, or replace a team member on any record that contains that team member.

To reassign multiple team member roles:

1. From Setup, enter `Mass Reassign Account Teams` in the `Quick Find` box, then select **Mass Reassign Account Teams**. Or, from Setup, enter `Mass Reassign Opportunity Teams` in the `Quick Find` box, then select **Mass Reassign Opportunity Teams**.

2. Select the `Add...`, `Remove...`, or `Replace...` option.

3. Click **Next**.

4. Enter your filter criteria to find the records you want to change.

5. Select the records you want to change from the list that matches your filter criteria.

6. Click **Next**.

7. Select the team member you want to add, remove, or replace on the selected records. If replacing a team member, select a replacement member as well.

8. Choose a role, the appropriate access to associated records, and check the appropriate reassign options as applicable.

9. Click **Add**, **Remove**, or **Replace** depending on your action.

10. When you are finished, click **Done**.

Setting Up Record Sharing

Your organization's sharing model and role hierarchy determine what access your users have to records they do not own. You can extend sharing using public groups, sharing rules, account or opportunity teams, or manually sharing an individual record.

Without changing your sharing model, your users can share individual records with other Salesforce users. For instructions on sharing individual records, see Tips for Manual Sharing on page 37.

To create sharing rules that extend sharing privileges of users to other users, first create public groups if necessary. Then, use these public groups to build your sharing rules.

Create Public Groups

When you create sharing rules, you can extend the sharing privileges of a public group with another public group. Before building your sharing rules, create public groups.

Create Sharing Rules

Create sharing rules if you want to extend sharing for specific users.

SEE ALSO:

Tips for Manual Sharing

Sharing Records

Create Public Groups

When you create sharing rules, you can extend the sharing privileges of a public group with another public group. Before building your sharing rules, create public groups.

To create public groups:

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

2. Click **New**.

3. Enter a group name.

4. Add members to the group. Choose a type of member from the drop-down list, select a value from the scrolling list, and click **Add**.

5. Click **Save**.

Create Sharing Rules

Create sharing rules if you want to extend sharing for specific users. Sharing rules give groups, queues, or roles access to the records owned by another group or role.

To create sharing rules:

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

2. Click **New** in the appropriate Sharing Rules related list.

3. Select the group, queue, or role whose records you want to share.

4. Select the group, queue, or role that needs access to these records.

5. Choose the access users should have to these records: Private, Read Only, or Read/Write.

6. Click **Save**.

Using Additional Security Features

Enterprise Edition includes more flexible security controls. For example, you may want to set login hours and IP ranges, lock IP addresses, and manage password policies for your users.

To enforce tightened security, the steps include:

Setting Login Hours and IP Ranges
>   Designate when users can log in and from where.

Preventing IP Shifting
>   Lock users to the IP address used to log in to Salesforce.

Managing Password Policies
>   Enforce restrictions for passwords.

SEE ALSO:
>   Additional Security Features

Setting Login Hours and IP Ranges

To secure your organization on Salesforce you can restrict the hours during which users can log in. You can also restrict the IP addresses that your users can use to log in to Salesforce.

💡 Tip: Login hours are based on the time zone of the administrator configuring the login hours. Consider the time difference when setting login hours for users in different time zones.

Preventing IP Shifting

Once your users log in, you can lock Salesforce sessions to prevent other unauthorized people from hijacking a valid session. This means that users are locked to the IP address used to log in to Salesforce for the entirety of their session.

To help prevent IP shifting:

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

2. Select the `Lock sessions to the IP address from which they originated` checkbox.

3. Click **Save**.

Managing Password Policies

To tighten security, create password policies for your organization:

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

2. Make the following selections:

   - `Enforce password history`

     Choose how many former passwords are stored and used when determining if a password is unique.

   - `Minimum password length`

     Select how many characters a password must have.

   - `Password complexity requirement`

     Enforce use of alphanumeric characters in passwords.

3. Click **Save**.

Customizing Group-Based Access to Folders and Views

You may already have folders for email templates, dashboards, and documents. You may have even restricted access to your folders. Enterprise Edition users can extend access of folders to groups of users, roles, or roles and subordinates.

Creating Groups
> Create public groups of users that need access to folders and list views.

Creating Group-Wide Folders
> Create folders as usual but make them visible to a group of users.

Creating Group-Wide Views
> Create list views as usual, making them visible to a group of users.

SEE ALSO:
> Group-Based Access to Folders and Views

Creating Groups

Before creating group-wide folders and list views, create the public groups and include the users that should have access to the folders and list views.

To create groups:

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

2. Click **New** on the Public Groups related list.

3. Enter a group name.

4. Select the users to include in the group and add them to the Selected Members list.

5. Click **Save**.

Creating Group-Wide Folders

You can extend folder access to a selected group of users.

To create group-wide folders:

1. Click **Create New Folder** from any page that lists folders, for example, on email templates, documents, or the Report Manager.

2. Enter a folder name.

3. Choose a `Public Folder Access` level. This determines whether users can view or edit the contents of the folder.

4. Choose a folder visibility option:

   - `This folder is accessible by all users`
   - `This folder is hidden from all users`
   - `This folder is accessible only by the following users:`

     – Choose **Public Groups**, **Roles**, or **Roles and Subordinates** from the drop-down list.
     – Select a group or role.
     – Click **Add**.

5. Click **Save**.

Creating Group-Wide Views

You can extend your list views to a selected group of users.

To create group-wide views:

1. Click **Create New View** from any page that displays list views.

2. Enter a view name.

3. Select search criteria for the contents of the list view.

4. Select the columns to be displayed in the list view.

5. Choose a view visibility option:

   - `Visible only to me`
   - `Visible to all users`
   - `Visible to certain groups of users:`

     – Choose **Public Groups**, **Roles**, or **Roles and Subordinates** from the drop-down list.
     – Select a group or role.
     – Click **Add**.

6. Click **Save**.

Setting Up Force.com Connect Offline

With Force.com Connect Offline, users can create, edit, and delete their Salesforce data using the same browser-based interface when disconnected from the Internet. Once users reconnect, Salesforce synchronizes all the changes made using Force.com Connect Offline.

Enabling Force.com Connect Offline for Users

Change the user information of each user that you want activated for Force.com Connect Offline.

Enabling Force.com Connect Offline for Profiles
> Customize user profiles to allow access to Force.com Connect Offline.

Installing Force.com Connect Offline
> See Installing Force.com Connect Offline for more instructions to give your users.

SEE ALSO:
> Tips for Force.com Connect Offline
> Force.com Connect Offline

Enabling Force.com Connect Offline for Users

Activate Force.com Connect Offline for each user that should have access to it.

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

2. Click **Edit** next to the name of the user you want to enable for Force.com Connect Offline.

3. Check the `Offline User` box.

4. Click **Save**.

Repeat these steps for all applicable users.

Enabling Force.com Connect Offline for Profiles

Activate Force.com Connect Offline for each profile that should have access to it.

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

2. Select the appropriate profile.

3. In the Desktop Client Access page or Desktop Integration Clients section, click **Edit**, then choose the appropriate On option for Force.com Connect Offline.

4. Click **Save**.

Repeat these steps for all applicable profiles.

Integrating with Back Office Systems

The Force.com API provides a programmatic means of interacting with the Salesforce platform to access and change data for the main entities represented in the Salesforce system. The API is a Web service that supports the SOAP protocol. All Enterprise Edition organizations have access to the Force.com API to integrate Salesforce with other systems.

For immediate access to the Force.com API, visit the Salesforce developer site at `developer.salesforce.com/page/API`. There, you can obtain the complete Force.com API technical documentation, and browse and download code samples, stubs, tools and tech notes to help you with your Salesforce integration project. Membership and access to the Salesforce community message boards is provided free of charge after registering for Salesforce.

In addition to the Force.com API, Salesforce provides additional tools to help you integrate applications. You can download the Salesforce Web Services Description Language (WSDL) file and import it into your development environment.

To download and import the Salesforce WSDL:

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

2. Right-click the appropriate link to download the enterprise WSDL or the partner WSDL. Import the WSDL file into your development environment.

> 💡 **Tip:** The Salesforce community is set up to provide technical support in our online developer forum. You can communicate with other developers and Salesforce experts. Within the Salesforce community you can get technical help and advice, and find out what others are doing with Web services directly from your peers.

SEE ALSO:

Back Office Systems

TIPS FOR TRAINING USERS

After you have set up all the advanced features available with Enterprise Edition, you may want to train your users. We recommend providing some instructions on the following features.

Tips for Multiple Business Processes and Record Types
Explain how this feature works and how you have implemented it.

Tips for Processing Approval Requests
Demonstrate the lifecycle of an approval request. Then show the appropriate users how to submit, approve, and reject approval requests.

Tips for Opportunity Teams
Instruct users on setting a default opportunity team, adding it to opportunities, and changing the opportunity team members on an opportunity.

Tips for Account Teams
Teach users how to set a default account team, add team members to accounts, and remove the team members on an account.

Tips for Manual Sharing
Train users to extend sharing of opportunities without changing your sharing model.

Tips for Force.com Connect Offline
Give users instructions on installing and using Force.com Connect Offline.

Tips for Multiple Business Processes and Record Types

You can design business processes that are completely invisible to your users. If you assign a single record type to each profile, your users are never prompted to choose a record type when creating new records. Furthermore, if you do not display the **Record Type** field on the page layout, users never see it. All that users see are the picklist values available to them when creating a record and they may not realize that other users have different values available to them for the same picklist field.

However, you may have users that need to create records for two different record types. For example, you may have created different record types for your hardware and software sales divisions, but you may have sales associates that create opportunities for both hardware and software sales divisions. In this case, the sales associate is prompted to select a hardware or software record type when creating new opportunities. If you have implemented multiple business processes to be completely invisible to your users, you may not need to train them. In either case, prepare users for the new business processes you have created.

We recommend:

Defining Multiple Business Processes
At a high level, describe what a business process is and how you plan to use many different ones in your organization. Review the steps of each business process with your users so they understand the flow and definitions you have created.

Explaining Your Implementation
Describe that users will be prompted for record types or that this will be invisible to them when creating records.

Setting Record Type Preferences
If users have more than one record type available, show them how to bypass the record type prompt by setting a default record type: users can do this in their personal settings, on the Record Type Selection or Set Default Record Type page.

Changing the Record Type Field

If you display the record type on page layouts, show your users how to change the record type of any record. From the detail page, click Change next to the `Record Type` field.

SEE ALSO:

Multiple Business Processes and Record Types

Setting Up Multiple Business Processes and Record Types

Tips for Processing Approval Requests

After you set up an approval process, your users need to understand its basic lifecycle. Walk your users through the following tasks:

Submitting approval requests

From the record, click **Submit for Approval** from the Approval History related list.

Approving approval requests

Click the link supplied in the email notification of an approval request and click **Approve**.

Rejecting approval requests

Click the link supplied in the email notification of an approval request and click **Reject**.

Reassigning approval requests

Click **Manage All** from the Items To Approve list on your custom home page. Then, click **Reassign**.

SEE ALSO:

Approval Processes

Setting Up Approval Processes

Tips for Opportunity Teams

After you have enabled team selling, users can create default opportunity teams and add them to opportunities. Training users on team selling can be easier if you show them how a model opportunity team might function. Set up your opportunity team roles and add them to an opportunity to show how an opportunity team works.

Setting Your Default Opportunity Team

Users who are opportunity owners can create default opportunity teams.

Applying Your Default Opportunity Team

Once you have created your default opportunity team, you can apply it to any opportunities you own.

Adding Opportunity Team Members

Add any number of individual opportunity team members to your opportunities.

Removing Opportunity Team Members

For any opportunity you own, you can remove any opportunity team member.

SEE ALSO:

Team Selling and Account Teams

Setting Up Team Selling and Account Teams

Setting Your Default Opportunity Team

Users who are opportunity owners can create default opportunity teams. Then they can include those team members on any opportunities they own.

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. Click **Add** in the Default Opportunity Team related list.

3. Select the users to add to your default opportunity team.

4. Select the access each member should have to the opportunities you own. This level must be higher than your organization's default opportunity access level.

5. Choose a role for each member.

6. To add this team to all opportunities you create or are transferred to you, select `Automatically add my default opportunity team...`.

7. To add this team to all open opportunities you own, select `Update open opportunity teams...`.

8. Click **Save**.

SEE ALSO:

   Salesforce Help: Personalize Your Salesforce Experience

Applying Your Default Opportunity Team

Once you have created your default opportunity team, you can apply it to any opportunities you own.

1. View the opportunity.

2. Click **Add Default Team** in the Opportunity Team related list.

Adding Opportunity Team Members

Add any number of individual opportunity team members to your opportunities. If you also have a default opportunity team, you can add default team members to a specific opportunity.

1. View the opportunity that has the opportunity team you want to change.

2. Click **Add** in the Opportunity Team related list.

3. Select the users you want to add.

4. Choose an access option and role for each new member.

5. Click **Save**.

Removing Opportunity Team Members

For any opportunity you own, you can remove any opportunity team member. This does not remove the member from your default opportunity team if he or she is a member of your default opportunity team.

To remove an opportunity team member:

1. View the opportunity that has the team member you want to remove.

2. Click **Del** next to the member in the Opportunity Team related list.

3. Click **OK** to confirm.

Tips for Account Teams

After you have enabled account teams, users can set up a default account team as well as add individual account team members to their accounts. Training users on account teams may be easier if you show them how a model account team might function. Set up your account team roles and add them to an account to show how an account team works.

Setting Your Default Account Team
> Users can create default account teams that include the colleagues they regularly collaborate with on accounts.

Applying Your Default Account Team
> Once you have created your default account team, you can apply it to any accounts you own.

Adding Account Team Members
> Add any number of individual account team members to your accounts.

Removing Account Team Members
> For any account you own, you can remove any account team member.

SEE ALSO:
> Team Selling and Account Teams
> Setting Up Team Selling and Account Teams

Setting Your Default Account Team

Users can create default account teams that include the colleagues they regularly collaborate with on accounts. Then they can include those team members on any accounts they own.

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. Click **Add** in the Default Account Team related list.

3. Select the users to add to your default account team.

4. Select the access each member should have to the accounts you own and the opportunities and cases of those accounts. This setting must be more restrictive than your organization's default access level for that type of record.

5. Choose a team role for each member.

6. To add this team to all accounts you create or that are transferred to you, select `Automatically add my default account team....`

7. To add this team to all your existing accounts, select `Update account teams....`

8. Click **Save**.

SEE ALSO:
> *Salesforce Help*: Personalize Your Salesforce Experience

Applying Your Default Account Team

Once you have created your default account team, you can apply it to any accounts you own.

1. View the account.

2. Click **Add Default Team** in the Account Team related list.

Adding Account Team Members

Add any number of individual account team members to your accounts. Note that account teams share the same set of team roles with opportunity teams.

> 💡 Tip: Account teams share the same set of team roles with opportunity teams.

To add account team members:

1. View an account.

2. Click **Add** in the Account Team related list.

3. Select the users you want to add.

4. Choose an access option and role for each new member.

5. Click **Save**.

Removing Account Team Members

For any account you own, you can remove any account team member. Alternatively, you can delete all team members from an account at once.

To remove account team members:

1. View the account that has the team member you want to remove.

2. Click **Del** next to the member in the Account Team related list. Alternatively, click **Delete All** in the Account Team related list.

3. Click **OK** to confirm.

Tips for Manual Sharing

The **Sharing** button on a record allows users to extend the sharing privileges of records individually. To share a record, a user must be the owner of the record, above the owner in the role hierarchy, or an administrator.

For example, to share an opportunity:

1. View the record you want to share.

2. Click **Sharing**.

3. Click **Add**.

4. From the drop-down list, choose a group, queue, role, or user option.

5. Add an available user, group, queue, or role to add to the New Sharing box.

6. Specify what type of access to grant: **Read Only** or **Read/Write** (depending on your organization-wide setting).

7. Click **Save**.

> **Tip:**
> - To share an opportunity, the person with whom you are sharing must have at least read access to the account associated with that opportunity. If you do not have access to extend read access to that account, ask the account owner to do it for you.
> - To share a case with another user, that user must have access to the account associated with the case.

SEE ALSO:

Sharing Records

Setting Up Record Sharing

Tips for Force.com Connect Offline

After you enable Force.com Connect Offline for your users, show them how to use it. You may want to walk them through the following tasks:

Installing Force.com Connect Offline

Each user should download the Force.com Connect Offline client to a laptop.

Running Force.com Connect Offline

Users can launch Force.com Connect Offline when disconnected.

Setting the Force.com Connect Offline Briefcase Contents

Force.com Connect Offline contains the data specified in the user's Briefcase.

Updating Salesforce with Your Force.com Connect Offline Data

Force.com Connect Offline updates data when users reconnect to Salesforce and update data.

SEE ALSO:

Force.com Connect Offline

Setting Up Force.com Connect Offline

Installing Force.com Connect Offline

Before users can begin using Force.com Connect Offline, they must install it on the machine that they intend to use when offline.

To install Force.com Connect Offline:

1. From your personal settings, enter `Connect Offline` in the `Quick Find` box, then select **Force.com Connect Offline**. The Force.com Connect Offline link is available to users only if the administrator has selected **Offline User** on their personal information and set the Force.com Connect Offline access level on the user's profile to the appropriate On option.

2. Click **Install Now**.

3. Click **Yes** when prompted to install and run the client.

4. Follow the prompts in the setup wizard.

Running Force.com Connect Offline

After you install the Force.com Connect Offline client, you can run it from the Windows Start menu by clicking **Start** > **Programs** > **Salesforce** > **Force.com Connect Offline** and entering your username and password.

Setting the Force.com Connect Offline Briefcase Contents

The first time you run Force.com Connect Offline, your Briefcase may not contain the data you want. Your Briefcase is the means you use to gather data to be included in your Force.com Connect Offline. Specify the data you want to use in your Force.com Connect Offline by setting your Briefcase contents.

1. From your personal settings, enter `Connect Offline` in the `Quick Find` box, then select **Force.com Connect Offline**.

2. Click **Briefcase Setup**.

3. Click **Edit** next to Briefcase Settings.

4. Choose a new setting for your set of accounts. Consult the Salesforce online help for details on what is included for each option below:

   - `Only manually selected accounts`
   - `Opportunity-based Briefcase`
   - `Activity-based Briefcase`
   - `All my accounts`

5. Click **Save**.

💡 Tip: To include individual accounts in your Briefcase, click **Include Offline** from any account.

Updating Salesforce with Your Force.com Connect Offline Data

After you have been working offline, synchronize the information you modified in Force.com Connect Offline with Salesforce online.

1. Connect to the Internet.

2. Start Force.com Connect Offline on your computer by clicking **Start** > **Programs** > **Salesforce** > **Force.com Connect Offline** and entering your username and password.

3. Click **Update Briefcase** in the upper right corner of the screen.

4. If prompted to resolve errors, click **OK** to resolve any data conflicts.

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