Set Up and Maintain Sales Tools

User Guide, Spring '16

@salesforcedocs

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SET UP AND MAINTAIN SALES TOOLS

Set Up and Maintain Sales Features

Help your sales reps sell more to customers. Learn about Salesforce core sales features, sales rep productivity features, and Microsoft email integration.

Core Sales Features

Core sales features help sales reps manage the basics: the people that they sell to, the products and services that your company offers, and more.

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- Salesforce App for Outlook
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- Salesforce for Outlook

Administering People and Organizations That Users Sell To

Administering Accounts

Enable Person Accounts

EDITIONS

Business accounts available in: Both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Salesforce Classic and Lightning Experience

Person accounts available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable person accounts:

- "Customize Application"

Note: This release contains a beta version of person accounts in Lightning Experience that is production quality but has known limitations. For more information see the Lightning Experience Limitations.

Important: Once person accounts have been enabled, they can't be turned off. Therefore, we recommend existing customers create a sandbox to preview how person accounts will affect their organization.

Before you begin, make sure to:

- Create at least one record type for accounts.
- Grant read permission on contacts for profiles that have read permission on accounts.
- Ensure that the contact sharing organization-wide default is set to "Controlled by Parent."

Once you complete the preliminary steps, contact Salesforce to enable person accounts and then:

1. From the object management settings for person accounts, go to Record Types.
2. Assign person account record types to profiles that require person accounts.

Note: Person accounts count against both account and contact storage because each person account consists of one account as well as one contact. Additional storage might be necessary when you implement person accounts, so you should review your storage usage.

Account Settings

EDITIONS

Account Insights is available in: Lightning Experience and Salesforce1

Account hierarchy is available in: Salesforce Classic

Business accounts available in: **All** Editions

USER PERMISSIONS

To change account settings

- "Customize Application"

Enable or disable the Account Insights and account hierarchy features on the Account Settings page.

Feature	What It Does
Account Insights	When enabled, Account Insights uses third parties and other Salesforce technologies, which offer different levels of privacy and security protection. These services can save or process some of your organization's data, such as Account Name and Website. Salesforce is not responsible for the privacy and security of data that is shared with third parties when you use this feature.

Feature	What It Does
Account hierarchy	When account hierarchy is enabled, a **[View Hierarchy]** link appears next to the account name on an account detail page. Click the link to view the relationships between the account and its parent account.

1. From Setup, enter `Account Settings` in the `Quick Find` box, then select **Account Settings**.
2. Click **Edit**.
3. Change settings as needed.
4. Save your changes.

Administering Relationship Groups

Configuring Contacts and Contact Roles

Creating Contact Sharing Rules

Contact sharing rules can be based on the record owner or on other criteria, including record type and certain field values. You can define up to 300 contact sharing rules, including up to 50 criteria-based sharing rules.

1. If you plan to include public groups in your sharing rule, confirm that the appropriate groups have been created.
2. From Setup, enter `Sharing Settings` in the `Quick Find` box, then select **Sharing Settings**.
3. In the Contact Sharing Rules related list, click **New**.
4. Enter the **Label Name** and **Rule Name**. The Label is the sharing rule label as it appears on the user interface. The Rule Name is a unique name used by the API and managed packages.
5. Enter the **Description**. This field describes the sharing rule. It is optional and can contain up to 1000 characters.
6. Select a rule type.
7. Depending on the rule type you selected, do the following:
    - `Based on record owner`—In the `owned by members of` line, specify the users whose records will be shared: select a category from the first drop-down list and a set of users from the second drop-down list (or lookup field, if your organization has over 200 queues, groups, roles, or territories).
    - `Based on criteria`—Specify the Field, Operator, and Value criteria that records must match to be included in the sharing rule. The fields available depend on the object selected, and the value is always a literal number or string. Click **Add Filter Logic...** to change the default AND relationship between each filter.

      Note: To use a field that's not supported by criteria-based sharing rules, you can create a workflow rule or Apex trigger to copy the value of the field into a text or numeric field, and use that field as the criterion.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create sharing rules:
- "Manage Sharing"

8. In the `Share with` line, specify the users who get access to the data: select a category from the first drop-down list and a set of users from the second drop-down list or lookup field.
9. Select the sharing access setting for users.

Access Setting	Description
Read Only	Users can view, but not update, records.
Read/Write	Users can view and update records.

10. Click **Save**.

Enable Social Accounts, Contacts, and Leads

Increase your users' access to social intelligence by enabling the Social Accounts, Contacts, and Leads feature for your organization or Salesforce1.

The Social Accounts, Contacts, and Leads feature and access to all available social networks are enabled by default for organizations created after the Spring '12 release. If your organization was created before that, you must enable the feature manually.

Note: If the Social Accounts, Contacts, and Leads feature is already enabled and but users can't see one or more social networks, see Troubleshoot Social Accounts, Contacts, and Leads.

1. From Setup, enter *`Social Accounts`* in the `Quick Find` box, then select **Social Accounts and Contacts Settings**.
2. Select **Enable Social Accounts and Contacts**.
3. Select the social networks that users in your organization can access. By default, all social networks are selected.

   In Salesforce Lightning Experience and the Salesforce1 mobile app, users can access Twitter only, even if other networks are enabled.
4. Click **Save**.
5. To make Twitter accessible in the Salesforce1 mobile app, add the Twitter card to the Mobile Cards section of the accounts, contacts, and leads page layouts.
6. Let your users know that they can configure Social Accounts, Contacts, and Leads for their individual use.

SEE ALSO:

Enable Data.com Social Key

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions except **Database.com**

Person accounts available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Contacts available in **All** Editions except **Database.com**

Leads available in: **Groups**, **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Data.com Clean and Data.comSocial Key available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To enable, configure, or disable Social Accounts, Contacts, and Leads:
- "Customize Application"

Considerations for Enabling and Managing the Customer Portal for Contacts

Consider key points before enabling the customer portal for contacts. Then use best practices to maintain your contact information.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Enabling the Customer Portal for Contacts

- Before you enable a contact for the customer portal, make sure that the owner of the contact's account is associated with a role in your organization.
- If a user is a partner user *and* a customer user, two contact records for the user are required to provide separate usernames and passwords for each portal.
- A contact can either be a Self-Service user and a partner user *or* a customer user.

  Note: Starting with Spring '12, the Self-Service portal isn't available for new organizations. Existing organizations continue to have access to the Self-Service portal.

- Any data that's created or owned by a Self-Service user can be visible to a partner user or customer user who's associated with the same contact.
- The user's `Nickname` defaults to the user's email alias unless you specify otherwise. For example, if the user's `Email` is "jsmith@company.com," the user's `Nickname` defaults to "jsmith" when you click **Save**.
- The first time you enable a contact for the customer portal on an account, the contact is assigned to the customer user role, which includes the name of the contact's account. You can update the contact's portal role later. (This behavior doesn't apply to high-volume customer users, because they don't have roles and aren't included in the role hierarchy.)

Managing the Customer Portal for Contacts

- Edit an enabled contact's access to your customer portal. Click **Manage External User**, and then choose **View Customer User**.
- Merge contacts that are enabled to use a customer portal.
- Change the account on the contact.
- Make sure that you keep your contacts' access to your customer portal up-to-date by deactivating and disabling access as needed.
- You can delete contacts only if they're disabled from the portal. Inactive portal users can't be deleted.

Enable the Customer Portal for Contacts and Person Accounts

To allow a customer to access your Salesforce customer portal, enable the customer's contact or person account record as a customer user.

1. From a contact or person account detail page, click **Manage External User**, and then select **Enable Customer User**.
2. Verify the general information and locale settings, and enter any missing information. The customer's `Username` defaults to the customer's `Email`.
3. Select a portal user license. The user license that you choose determines the permission sets, user profile, and role hierarchy options that you can select for the customer user. See Customer Portal User Licenses.
4. Select `Generate new password and notify user immediately` to email a customer portal username and password to the customer.

   If your Salesforce org uses multiple customer portals, customer users can access all customer portals that are assigned to their profiles with a single username and password. See Creating Multiple Customer Portals.
5. Click **Save**.
6. To troubleshoot or confirm the portal configuration, on the contact detail page, click **Manage External User**, and then choose **Log in to Portal as User**. A new browser window opens and logs you in to the portal as the partner user.

You can deactivate customer users as needed.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable customer users or to log in as a portal user:
- "Edit" on the account that's associated with the customer user

  AND

  "Edit Self-Service Users"

SEE ALSO:

Enable Social Accounts, Contacts, and Leads

Enable Self-Service for Contacts and Person Accounts

To provide access to your Self-Service portal, enable Self-Service for a customer's contact or person account record. A Self-Service user can view cases in the Self-Service portal only if they're associated with the user's account record.

Note: Starting with Spring '12, the Self-Service portal isn't available for new organizations. Existing organizations continue to have access to the Self-Service portal.

1. From the contact or person account detail page, click **Enable Self-Service**.
2. Verify the general information and locale settings, and enter any missing information. The customer's Self-Service `Username` defaults to the customer's `Email`.
3. To enable the customer as a Self-Service super user, select the `Super User` checkbox. Super users can view case information, add comments, and upload attachments for all cases that anyone in their company submits.
4. Select `Generate new password and notify user immediately` to email a Self-Service username and password to the customer.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable Self-Service users:
- "Edit Self-Service Users"

Define Contact Roles for Contacts on Opportunities

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

Determine what contact roles are available for your sales reps to add to contacts on opportunities. Specify the values for the contact roles that appear in picklists and the sequence they appear in. And define how colors represent contact roles in charts that include them.

1. From Setup, enter `Contact` in the `Quick Find` box, then select **Contact Roles on Opportunities**.
2. Manage predefined contact roles, or create other contact roles as needed.
3. Save your changes.

Set Up Data.com Prospector

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement Data.com:
- "Customize Application"

To enable Data.com users:
- "Manage Internal Users"

To install AppExchange packages:
- "Download AppExchange Packages"

Let your reps prospect for companies, leads, and contacts right in Salesforce. To do so, just set up and implement Data.com Prospector.

Important: You need to assign a Data.com license directly to a user in order for that user to add and export files from Data.com.

IN THIS SECTION:

1. How Do Data.com User Types, Licenses, and Record Addition Limits Work?
   User types, licenses, and record addition limits control what users can access Data.com and what Data.com users can do.
2. Set Up Data.com Users
   Give users access to Data.com and set their record addition limits so they can start taking advantage of Data.com's rich database of accounts, contacts, and leads.
4. Enable Data.com Clean for Data.com Prospector
   Let users manually clean account, contact, and lead records. You can even clean records that were added from another source. Clean is automatically enabled when you use Data.com Prospector. With Data.com Premium Prospector, you can manually clean D&B Company records that are linked to account or lead records.
5. Configure Data.com Corporate Prospector
   Data.com Corporate Prospector provides a basic set of Dun & Bradstreet account and lead data, including `D-U-N-S Number`, `NAICS Code`, `Tradestyle`, and more. Here's how to implement this product.
6. Configure Data.com Premium Prospector
   Data.com Premium Prospector is an upgrade to Data.com Corporate Prospector. With Premium Prospector, you get all the features and fields available in Corporate Prospector, plus over 70 additional D&B fields for accounts and leads you add to Salesforce from Data.com. Like Data.com Corporate Prospector users, Premium Prospector users can also view a limited number of D&B fields on account and lead records.
7. Limit What Users Can Do with Data.com Search Results
   Use the **Add to Salesforce** and **Export Results** to limit what users can do with Data.com search results forData.com features that use the search results.
8. Respect Do-Not-Contact Settings in Data.com Search Results and Exports
   In Data.com search results and export files, you can prevent certain contact information from being displayed.

9. Guidelines for Letting Your Users Prospect for Companies, Contacts, and Leads with Data.com Prospector
   We offer two versions of Data.com Prospector. Both let you search and add data from Data.com: Check out some guidelines for implementing both versions.

SEE ALSO:

How Do Data.com User Types, Licenses, and Record Addition Limits Work?

How Do Data.com User Types, Licenses, and Record Addition Limits Work?

User types, licenses, and record addition limits control what users can access Data.com and what Data.com users can do.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

IN THIS SECTION:

Check Data.com License Information, Record Addition Balances, and Limits

Check important license, record addition, and limits information from the Data.com Licenses & Limits page in Setup. This page also shows daily API limits for Data.com.

How Do Licenses Work for Data.com Prospector?

Data.com Prospector user licenses let users search Data.com for accounts and contacts, and add them as records to Salesforce. Users can be assigned one of two types of licenses—Data.com User and Data.com List User— and each type has its own characteristics.

How Do Licenses Work for Data.com Clean?

If your organization uses Data.com Prospector, users with those licenses can manually clean the account, contact, and lead records they have access to. If your organization purchased a Data.com Clean product, you can also run automated jobs to clean records, and all Salesforce users (not just those with Data.com Prospector licenses) can manually clean records.

SEE ALSO:

Set Up Data.com Users

Check Data.com License Information, Record Addition Balances, and Limits

Check important license, record addition, and limits information from the Data.com Licenses & Limits page in Setup. This page also shows daily API limits for Data.com.

Tip: To see how many records each user has added or exported, check the All Data.com Users page. From Setup, enter `Users` in the `Quick Find` box, then select **Prospector Users**. Or, if your organization has access to custom report types, you can use the Data.com Usage object to create a report that shows more detailed usage information.

1. From Setup, enter `Licenses & Limits` in the `Quick Find` box, then select **Licenses & Limits**.

SEE ALSO:

How Do Data.com User Types, Licenses, and Record Addition Limits Work?

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

"To view Data.com Setup pages:"

- "Customize Application"

How Do Licenses Work for Data.com Prospector?

Data.com Prospector user licenses let users search Data.com for accounts and contacts, and add them as records to Salesforce. Users can be assigned one of two types of licenses—Data.com User and Data.com List User— and each type has its own characteristics.

Important: You need to assign a Data.com license directly to a user in order for that user to add and export files from Data.com.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Data.com User

Data.com Users get a limited number of account, contact, and lead records to add or export per month. The default number of records per licensed user is 300. The record addition limit for each licensed user refreshes at midnight on the first of the month (based on the time zone of the organization) regardless of your contract start date. Unused record additions expire at the end of each month, *do not* rollover to the next month, and are not refundable.

Example: The sales division of Universal Telco has 14 sales reps, and they purchase 20 Data.com Prospector licenses, each of which has a record addition limit of 300. This means that Data.com Users within the organization can add as many as 6,000 records per month. The Universal Telco administrator distributes the Data.com Users' monthly record addition limits as follows.

- Ten of the sales reps have limits of 300 each
- Two of the sales reps have limits of 500 each
- Two of the sales reps have a limit of 1,000 each

Data.com List User

Data.com List Users get a limited number of account, contact, and lead records to add or export per month. Unused record additions expire at the end of each month and *do not* rollover to the next month. After the monthly limit is used, List Users draw record additions from a pool that is shared by all List Users in the organization. Unused pool additions expire one year from purchase. Only Data.com List Users can draw from the organization's pool limit. If a Data.com User wants to draw from the organization's pool limit, you need to change that user to a Data.com List User.

Example: The marketing division of Universal Telco has four marketing reps. Each rep has a Data.com Prospector license and each is a Data.com List User. Universal Telco purchases enough monthly record additions so that each Data.com user has a monthly default limit of 300 records. The company also purchases a record addition pool of 5,000 records. This means that after each marketing rep uses his monthly limit, he can start using the pool limit. Together, all four marketing reps can add 5,000 records from the pool. One rep might add 2,500 records, leaving 2,500 to be added by one or more of the other three users.

SEE ALSO:

How Do Data.com User Types, Licenses, and Record Addition Limits Work?

How Do Licenses Work for Data.com Clean?

If your organization uses Data.com Prospector, users with those licenses can manually clean the account, contact, and lead records they have access to. If your organization purchased a Data.com Clean product, you can also run automated jobs to clean records, and all Salesforce users (not just those with Data.com Prospector licenses) can manually clean records.

The Data.com Licenses & Limits page in Setup shows which users can clean records and whether your organization can use automated clean jobs.

Note: If your organization purchased only Data.com Prospector, only users with licenses can clean records.

SEE ALSO:

How Do Data.com User Types, Licenses, and Record Addition Limits Work?

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Set Up Data.com Users

Give users access to Data.com and set their record addition limits so they can start taking advantage of Data.com's rich database of accounts, contacts, and leads.

Important: You need to assign a Data.com license directly to a user in order for that user to add and export files from Data.com.

1. From Setup, enter `Manage Users` in the `Quick Find` box, then select **Users**.
2. On the Users page, click **Edit** next to the name of the user you want to enable.
3. In the `Data.com User Type` drop-down, select the user type. There are two types of users: Data.com User and Data.com List User. Data.com Users get a limited number of account, contact, and lead records to add or export per month, and their unused additions expire at the end of each month. Data.com List Users have the same monthly limits as Data.com Users. After the monthly limit is used, List Users draw record additions from a pool that is shared by all List Users in the organization.
4. In the `Data.com Monthly Addition Limit` drop-down, select the number of account, contact, and lead records the user can add each month. You can select up to the organization limit for any user or all users, but once the organization's monthly limit is reached, users won't be able to add more records.
   For example, if your organization's monthly addition limit is 3,000 records, you might assign one user a monthly addition limit of 500 records, another user a limit of 1,000 records, and another user the organization limit (in this case 3,000 records). If the second user adds all 1,000 of his records right away, the third user will be able to add only up to 2,000 records, and depending on how many the third user adds, the first user may not be able to add any records.

   Tip: You can find your organization's monthly organization addition limit on the Data.com Licenses & Limits page. From Setup, enter `Licenses & Limits` in the `Quick Find` box, then select **Licenses & Limits**.

5. Click **Save**, or **Save and New** if you want to set up other users for Data.com.

   Tip: You can also use the Apex Data Loader to set up Data.com users, select the Data.com user type, and set the monthly addition limit, if applicable. To do so, export your user records to a `.csv` file, change the necessary fields for each user you want to set up, and then import the `.csv` file into Salesforce. The fields to export from the User object are `LastName`, `FirstName`, `UserPermissionsJigsawProspectingUser`, `JigsawImportLimitOverride`, and `UserPreferencesJigsawListUser`. For more information about the User object, see the "SOAP API Developer's Guide."

   The number of Data.com users you can set up—within Salesforce or via the Data Loader—depends on the number of Data.com licenses you purchased. Make sure you stay within that limit when setting up users via the Data Loader.

SEE ALSO:

How Do Data.com User Types, Licenses, and Record Addition Limits Work?

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement Data.com:
- "Customize Application"

To enable Data.com users:
- "Manage Internal Users"

To install AppExchange packages:
- "Download AppExchange Packages"

Enable Data.com Clean for Data.com Prospector

Let users manually clean account, contact, and lead records. You can even clean records that were added from another source. Clean is automatically enabled when you use Data.com Prospector. With Data.com Premium Prospector, you can manually clean D&B Company records that are linked to account or lead records.

Note:

- If you've purchased Data.com Clean, you can clean account, contact, and lead records manually *and with automated jobs*. If you've purchased the Data.com Premium Clean version of the product, you can also use automated jobs to clean D&B Company records that are linked to account or lead records. For complete details, see Set Up Data.com Clean.
- Enabling Clean *does not* clean your records immediately, and you can click **Disable** to turn off the feature.

1. From Setup, enter `Clean Settings` in the `Quick Find` box, then select **Clean Settings**
2. Confirm that Data.com Clean is enabled.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To enable or disable Data.com Clean:
- "Customize Application"

IN THIS SECTION:

Considerations for Custom Mapping of Data.com and Salesforce Fields

Custom mappings put Data.com values in the Salesforce account, contact, and lead fields where you want those values. Before mapping fields, make sure you understand how mapping works, what preparations to make, and what kind of results you should expect.

Considerations for Allowing Duplicate Data.com Records in Salesforce

Organizations that use a sharing model may want to allow Data.com users to add duplicate account, contact, or lead records to Salesforce.

SEE ALSO:

Set Up Data.com Clean

Considerations for Custom Mapping of Data.com and Salesforce Fields

Custom mappings put Data.com values in the Salesforce account, contact, and lead fields where you want those values. Before mapping fields, make sure you understand how mapping works, what preparations to make, and what kind of results you should expect.

Not all Data.com fields are available for all Salesforce fields. To be mappable, the new Salesforce field must be the same data type as the default field. For example, the `Description` field can be mapped to a long text area field with 1,000 characters or more.

Custom field mappings apply when:

- Data.com records are added to Salesforce
- Salesforce records are matched with Data.com records and cleaned either manually or with automated jobs

Before you map fields, make sure you understand these potential outcomes and the related actions you should take.

- Mapping fields or updating mappings forces a full sync with Data.com: all records of enabled CRM objects (accounts, contacts, and leads) are updated, even if no records have changed.
- Data.com field mappings may conflict with any Salesforce field customizations (such as approvals, workflow rules, or Apex triggers) you use for accounts, contacts, leads, or D&B Company records. Review and edit your customizations as needed so they will work with the values supplied by your mappings.
- You can skip mapping individual Data.com fields, but values for skipped fields won't be added, exported, or considered when we calculate a record's clean status.
- Skipping or changing mappings for fields used to match Salesforce and Data.com records may change some records' clean status to `Not Found`.
- For account records, skipping or changing the mapping for the `D-U-N-S Number` field will cause all account jobs to use the Data.com matching service, rather than the `D-U-N-S Number` field, to rematch account records.
- If you map fields and also set Clean job preferences to flag, auto-fill, or overwrite Salesforce fields, you'll see any *custom-mapped* fields when you set those preferences. Default mappings (such as from the Data.com `Phone` field to the Salesforce `Phone` field) do not appear.
- If you export Data.com search results, the column headers in your Excel file will show the mapped field names. For example, if you map the Data.com `Phone` field to the Contact object's `Mobile` field, you'll see a header called "Mobile" for contacts, not "Phone".
- If you map Data.com fields that do not have values, some Salesforce records might revert to `Not Found` clean status.
- If you map a Data.com field to a custom Salesforce field, the custom field's label will appear on the Clean comparison page.
- If you want to track changes to field mappings, you'll find them in the Setup Audit Trail. From Setup, enter *`View Setup Audit Trail`* in the `Quick Find` box, then select **View Setup Audit Trail**.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

IN THIS SECTION:

Default Data.com-to-Salesforce Field Mappings

When you add records with Data.com Prospector or update records with Data.com Clean, some Salesforce fields get values from Data.com. Salesforce admins can customize these field mappings.

Customize Data.com-to-Salesforce Field Mappings

You can create custom mappings to put Data.com values in particular Salesforce fields.

Custom Data.com-to-Salesforce Field Mappings
Map custom Data.com fields to the Accounts, Contacts, or Leads object to give your sales reps more detailed information.

SEE ALSO:

Default Data.com-to-Salesforce Field Mappings
Customize Data.com-to-Salesforce Field Mappings
Review Triggers and Workflow Rules for Clean Compatibility

Default Data.com-to-Salesforce Field Mappings

When you add records with Data.com Prospector or update records with Data.com Clean, some Salesforce fields get values from Data.com. Salesforce admins can customize these field mappings.

Default fields are available under the object's **Page Layouts** > **Fields** section.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Accounts

Data.com Field	Account Field
`Annual Revenue` (in US dollars)*	`Annual Revenue`
`Company Description`	`Description`
`D-U-N-S Number`	`D-U-N-S Number`
`Facsimile Number`	`Fax`
`Location Type`	`Account Site`
`Mailing Address`**	`Shipping Address`
`Number of Employees-Total`	`Employees`
`Ownership Type Indicator`	`Ownership`
`Primary Address`	`Billing Address`
`Primary Business Name`	`Account Name`
`Primary NAICS Code`	`NAICS Code`
`Primary NAICS Description`	`NAICS Description`
`Primary SIC Code`	`SIC Code`
`Primary SIC Description`	`SIC Description`
`Primary Tradestyle`	`Tradestyle`
`Telephone Number`	`Phone`
`Ticker Symbol`	`Ticker Symbol`
`URL`	`Website`
`Year Started`	`Year Started`

Tip: Not all Data.com fields are mapped by default to the Account page. To map more Data.com fields to Account fields, see Customize Data.com-to-Salesforce Field Mappings on page 17 and check out the latest release notes to find new mappable fields.

Contacts

D&B Field	Contact Field
`Primary Address`	`Mailing Address`
`Primary Business Name`	`Account Name`

Leads

D&B Field	Lead Field
`Annual Revenue`* (in US dollars)	`Annual Revenue`
`Company Description`	`Description`
`D-U-N-S Number`	`Company D-U-N-S Number`
`Number of Employees-Total`	`No. of Employees`
`Primary Address`	`Address`
`Primary Business Name`	`Company`

* You can't access the Data.com `Annual Revenue` field. It's used only to populate the `Annual Revenue` field in Salesforce.

**Data.com Clean does not use the `Mailing Address` mapping for accounts. It uses only the `Primary Address` value to update accounts.

SEE ALSO:

- Customize Data.com-to-Salesforce Field Mappings
- Default Data.com-to-Salesforce Field Mappings

Customize Data.com-to-Salesforce Field Mappings

You can create custom mappings to put Data.com values in particular Salesforce fields.

Custom field mappings apply when:

- Data.com records are added to Salesforce
- Salesforce records are matched with Data.com records and cleaned either manually or with automated jobs

Before you change field mappings, it's important to understand how mapping works, what preparations to make, and what kind of results you should expect.

Note: Not all Data.com fields are available for all Salesforce fields. To be mappable, the new Salesforce field must be the same data type as the default field. For example, the `Description` field can be mapped to a long text area field with 1,000 characters or more.

1. From Setup, enter the name of the object you want to map the Data.com fields to, for example, **Accounts**, then select **Fields**.
2. Click **New** next to Custom Fields & Relationships for the object you want to map the fields to, for example, **Accounts Custom Fields & Relationships**.
3. Tip: It's best to create all the fields in the object that you are adding fields to before mapping them from **Data.com Administration**.

   Follow the steps in the New Custom Field wizard. When your finished, be sure to click **Save**.
4. From Setup, enter **Data.com Administration**, then click **Field Mapping**.
5. Find the field you want to map, and select the custom mapping from the list box next to the field.
6. Click **Save**.

SEE ALSO:

Default Data.com-to-Salesforce Field Mappings

Considerations for Custom Mapping of Data.com and Salesforce Fields

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement Data.com:
- "Customize Application"

To enable Data.com users:
- "Manage Internal Users"

To install AppExchange packages:
- "Download AppExchange Packages"

Custom Data.com-to-Salesforce Field Mappings

Map custom Data.com fields to the Accounts, Contacts, or Leads object to give your sales reps more detailed information.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Accounts

You can name custom fields anything you like. We recommend that your custom field names match the Data.com field names.

Tip: Create the custom fields in the object that you want to add them to before adding the fields from the Field Mapping page under Data.com Administration.

Data.com Field	Type	Length	Decimal Places	Accounts Field Suggested Name
`Fortune Rank 1000`	Number	4	0	`Fortune Rank 1000`
`S&P 500`	Text	10	0	`S&P 500`
`Location Size`	Number	10	0	`Location Size`
`Location Size Accuracy`	Text	64	0	`Location Size Accuracy`
`Location Size Unit of Measure`	Text	64	0	`Location Size Unit of Measure`
`Employee Growth`	Number	12	6	`Employee Growth`
`Annual Revenue Growth`	Number	12	6	`Annual Revenue Growth`
`Prior Year Number of Employees`	Number	18	0	`Prior Year Number of Employees`
`Prior Year Revenue`	Currency	18	0	`Prior Year Revenue`

Considerations for Allowing Duplicate Data.com Records in Salesforce

Organizations that use a sharing model may want to allow Data.com users to add duplicate account, contact, or lead records to Salesforce.

Keep these considerations in mind when setting your duplicate preferences.

- Records are considered duplicates when they have the same Data.com ID number in the `Data.com Key` field. This includes records that were added from Data.com as both contacts and leads.
- You can allow duplicates by object for the entire organization—not for individual users. If, however, you want to prevent a user or profile from being able to add duplicates, you can create a trigger.
- Records that are already in Salesforce are marked with a green dot (●) in search results. These records can be re-added by any Data.com user if your organization allows duplicates for the object.
- Records that have been added to Salesforce from Data.com are marked with a blue checkmark (✓) in search results. These records can be re-added by any Data.com user if your organization allows duplicates for the object. Adding a record affects the record balance only the first time that record is added to Salesforce: adding duplicates *does not* affect the record balance.
- If your Data.com preferences are set to allow duplicates but your organization also uses duplicate rules to prevent the creation of duplicate records, the duplicate rule will determine if the duplicate record is allowed or blocked.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Configure Data.com Corporate Prospector

Data.com Corporate Prospector provides a basic set of Dun & Bradstreet account and lead data, including `D-U-N-S Number`, `NAICS Code`, `Tradestyle`, and more. Here's how to implement this product.

> Note: To find out which Data.com Prospector product your organization has, from Setup, enter *`Licenses & Limits`* in the `Quick Find` box, then select **Licenses & Limits**. On the Licenses & Limits page, check the Data.com Prospector Licenses section. You'll see either "Corporate" or "Premium."

1. Make sure you've implemented Data.com.
2. Enable Data.com Clean so your users can manually clean account, contact, and lead records.
3. Configure your account, contact, and lead page layouts with the buttons and fields you need.
4. If you use Enterprise, Unlimited, or Performance Editions, you'll need to update your field-level security so users see fields provided by D&B.

Best Practices for Your Configuration

If your organization uses either version of Data.com Prospector, and you create validation rules for the fields that the product provides, those rules will still attempt to run even if you stop using the product, so disable any validation rules using those fields in that case. Data.com Prospector fields are identified in the help topics "Account Fields" and "Lead Fields".

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement Data.com Corporate Prospector:

- "Customize Application"

Configure Data.com Premium Prospector

Data.com Premium Prospector is an upgrade to Data.com Corporate Prospector. With Premium Prospector, you get all the features and fields available in Corporate Prospector, plus over 70 additional D&B fields for accounts and leads you add to Salesforce from Data.com. Like Data.com Corporate Prospector users, Premium Prospector users can also view a limited number of D&B fields on account and lead records.

Note: To find out which Data.com Prospector product your organization has, from Setup, enter `Licenses & Limits` in the `Quick Find` box, then select **Licenses & Limits**. On the Licenses & Limits page, check the Data.com Prospector Licenses section. You'll see either "Corporate" or "Premium."

Here's how to configure Data.com Premium Prospector.

1. Make sure you've implemented Data.com Prospector.
2. Confirm that Data.com Clean is enabled, so your users can manually clean account, contact, and lead records.
3. Configure your account, contact, and lead page layouts with the buttons and fields you need.
4. If you use Enterprise, Unlimited, or Performance Editions, you'll need to update your field-level security so users see fields provided by D&B.
5. Add the D&B Companies tab to user profiles.
6. (Optional) We've created a default layout for D&B Company records, but you may want to use the Enhanced Page Layout Editor to customize the page layout.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement Data.com Premium Prospector:
- "Customize Application"

Best Practices for Your Configuration

- You can let your users view and delete D&B Company records. To do this, you'll assign permissions to standard and custom profiles.

  For standard profiles, assign the permission `Delete D&B Company records` in addition to the preassigned permission `Read D&B Company records`.

  For custom profiles, assign both of the permissions `Read D&B Company records` and `Delete D&B Company records`.
- If your organization uses either version of Data.com Prospector, and you create validation rules for the fields that the product provides, those rules will still attempt to run even if you stop using the product, so disable any validation rules using those fields in that case. Data.com Prospector fields are identified in the help topics "Account Fields" and "Lead Fields".

Limit What Users Can Do with Data.com Search Results

Use the **Add to Salesforce** and **Export Results** to limit what users can do with Data.com search results forData.com features that use the search results.

Warning: Changing button preferences impacts all features associated with `Find Contacts` and `Find Accounts`. For example, if you clear the `Add to Salesforce` check box under `Find Accounts`, the `Add` accounts feature is disabled in Company Hierarchy.

1. From Setup, enter *`Preferences`* in the `Quick Find` box, then select **Prospector Preferences**.
2. In the Button Preferences section of the page, deselect what you want to remove from the Find Contacts and Find Accounts tabs.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement Data.com:
- "Customize Application"

Respect Do-Not-Contact Settings in Data.com Search Results and Exports

In Data.com search results and export files, you can prevent certain contact information from being displayed.

In particular, you can mask out or remove:

- Email and phone values for contact and lead records already in Salesforce that have `Do Not Call` or `Email Opt Out` selected; and
- Email values for all contact and lead records with Canada addresses (to support Canada's privacy requirements)

For example: You have a lead record in Salesforce for Sally Larkin and on that record the `Do Not Call` checkbox is selected. You search for Sally Larkin as a contact on the Data.com tab and her record appears in the search results list, marked as already in Salesforce (●). The `Phone` field is masked in the search results list, and also on Sally's contact card. If you export the record, its `Phone` field is blank in the `.csv` file.

1. From Setup, enter *`Preferences`* in the `Quick Find` box, then select **Prospector Preferences**.
2. Select `Respect Do-Not-Contact Settings and Canada's Privacy Requirements`.
   For records that have `Do Not Call` or `Email Opt Out` selected, `Phone` or `Email` field values are masked in the search results and on the contact card, and blank in `.csv` files created when you export records. For records with Canada addresses, `Email` field values are masked in the search results and on the contact card, and blank in `.csv` files created when you export records.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement Data.com:
- "Customize Application"

Guidelines for Letting Your Users Prospect for Companies, Contacts, and Leads with Data.com Prospector

We offer two versions of Data.com Prospector. Both let you search and add data from Data.com: Check out some guidelines for implementing both versions.

Note: If a search produces many results, you don't see data past page 10. Contact Salesforce Customer Support to enable unlimited view.

- If you add more than 200 leads to Salesforce at one time, any lead assignment rules your organization uses don't run. To make sure your lead assignment rules run, instruct your users to limit their additions to fewer than 200 leads at any time.
- If your organization uses validation rules on fields that are mapped to Data.com, either deactivate the rules or make sure that they match Data.com field names to avoid errors when adding records.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Set Up Data.com Clean

USER PERMISSIONS

To implement Data.com Clean:	"Customize Application"
To enable Data.com Clean users:	"Manage Internal Users"
To define triggers:	"Author Apex"
To define workflow rules:	"Customize Application"
To install AppExchange packages:	"Download AppExchange Packages"

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Your business is only as good as its data. Do you want to spend less time updating and enriching data and more time growing your business? Just set up and implement Data.com Clean. Then, your Salesforce records will be complete and up-to-date!

Note: If you're using Data.com Prospector together with Data.com Clean, see Set Up Data.com Prospector on page 8.

IN THIS SECTION:

1. Confirm That Data.com Clean Is Enabled
   Learn how to enable Data.com Clean so your organization can start keeping its records up to date.
2. Configure Page Layouts for Data.com Prospector and Data.com Clean
   When you implement Data.com Prospector and Data.com Clean, so that users can use the product, you need to add buttons and fields to your Account, Contact, and Lead page layouts. If you use Data.com Premium Prospector or Data.com Premium Clean, you can add a button to your D&B Companies page layouts so users can refresh linked D&B Company records.

3. Set Field-Level Security for Data.com

   If your organization uses Data.com Prospector or Data.com Clean, you can view a number of D&B fields on account records, and those fields are included when users manually clean records. To make sure your users can read and edit the fields and their values, and that they appear on the Account Card, you need to set field-level security.

4. Define Your Preferences and Select an Account Matching Service for Data.com Clean

   Clean preferences let you specify which objects' records you want to clean and how you want to clean them. This includes selecting the matching service that's used to clean accounts.

5. Set Up Data.com Clean Jobs

   If your organization has a Data.com Clean license, you can set up automated jobs to clean your records.

6. Review Triggers and Workflow Rules for Clean Compatibility

   If your organization uses triggers or workflow rules on objects enabled for Clean (Account, Contact, Lead, or D&B Company), review the triggers and workflows and consider making adjustments or bypassing them so users don't encounter unexpected results when records are cleaned.

7. Configure List Views for Data.com Clean

   Before your Data.com Clean users can clean records from a list, you'll need to add the `Clean Status` field to your organization's list views.

8. Find Out How Clean Your Accounts Are

   If you use Data.com Clean, you can review the `Clean Status` on all your accounts by running a simple Accounts by Clean Status report.

9. Determine How Well Data.com Clean Is Working

   Data.com Clean metrics and analytics tell you how your organization's accounts, contacts, and leads have been matched and updated with Data.com data, so it's important to check your match and update rates on a regular basis.

10. Report on Salesforce Records with a Specific Data.com Clean Status

    Create a custom report to show Salesforce account, contact, or lead records that have a specific clean status (such as `Different`).

11. Set Up Clean Rules

    Help your sales and marketing teams maintain great relationships with customers and pursue the most promising leads and opportunities by automatically enriching your Salesforce accounts, contacts, and leads with the latest information. It's all done using Data.com clean rules.

12. Find Out How Many of Your Organization's Records Need Better Data

    Data.com Data Assessments is a free Salesforce AppExchange package that tells you how many of your organization's records Data.com can enrich with more and better data. It can also tell you how many of your records have been marked as `Inactive` in Data.com, and if you request, how many records in your Salesforce organization appear to be duplicates.

13. Guidelines for Keeping Your Organization's Records Complete and Up-to-Date with Data.com Clean

    Here are some tips and best practices for implementing, monitoring, and working with Data.com Clean.

Confirm That Data.com Clean Is Enabled

Learn how to enable Data.com Clean so your organization can start keeping its records up to date.

Data.com Clean ensures that your CRM records are always up to date. You can use Clean with all your account, contact, and lead records—not just those records added from Data.com. When you purchase the Data.com product, Clean is automatically enabled, so you can set up automated Clean jobs and users can clean individual records manually or clean groups of records from a list view.

Enabling Clean makes clean features available to your organization, and it causes the **Preferences** and **Jobs** links to appear in Setup under the Clean section.

Note: Enabling Clean *does not* clean your records immediately, and you can click **Disable** to turn off the feature.

1. From Setup, enter `Clean Settings` in the `Quick Find` box, then select **Clean Settings**.
2. Confirm that Data.com Clean is enabled.

SEE ALSO:

Set Up Data.com Clean

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To enable or disable Data.com Clean:

- "Customize Application"

Configure Page Layouts for Data.com Prospector and Data.com Clean

When you implement Data.com Prospector and Data.com Clean, so that users can use the product, you need to add buttons and fields to your Account, Contact, and Lead page layouts. If you use Data.com Premium Prospector or Data.com Premium Clean, you can add a button to your D&B Companies page layouts so users can refresh linked D&B Company records.

> Note: If your organization uses Professional Edition, custom page layouts and field-level security are not available, so you must add *all* available Data.com fields and buttons to your page layout for each object (accounts, contacts, leads, and D&B Companies).

1. From the object management settings for accounts, go to Page Layouts.
2. From the list of page layouts, click **Edit** next to the layout(s) your Data.com Prospector or Data.com Clean users will use.
3. On the Account Layout page, from the list of page element categories, click **Fields**.
4. Drag the `Clean Status` field into place on the page where you want it to appear.
5. If you use Data.com Corporate Prospector or Data.com Premium Prospector, add the D&B fields you want users to see. These include `Account Site`, `D-U-N-S Number`, `NAICS Code`, `Tradestyle`, and more. For a complete list of the D&B fields available on account records, see Account Fields.

   > Tip: We recommend creating a section for D&B fields and grouping them there. To create a section, from the **Fields** group, just drag the `Section` element into place on the page.

6. If you want your users to be able to refresh D&B Company records, add the **Refresh** button to D&B Company page layouts.
7. If you use the Do Not Auto-Update validation rule provided in the Data.com Reports AppExchange package, add the `Data.com Does Not Auto-Update` field.
8. From the list of page element categories, click **Buttons**. Drag the **Clean**, **Get Contacts**, **Prospecting Insights**, and **Company Hierarchy*** buttons into place on the page.

   *Available only with a Data.com Premium Prospector license

9. Click **Save**.
10. From the object management settings for leads, go to Page Layouts.
11. Repeat the steps to add the `Clean Status` field and the **Clean** button to your Lead page layouts.
12. If you use Data.com Corporate Prospector, add the `Company D-U-N-S Number` field. If you use Data.com Premium Prospector, add the `Company D-U-N-S Number` and `D&B Company` fields.
13. If you use the Do Not Auto-Update validation rule provided in the Data.com Reports AppExchange package, add the `Data.com Does Not Auto-Update` field.
14. From the object management settings for contacts, go to Page Layouts.
15. Repeat the steps to add the `Clean Status` field and **Clean** button to your Contact page layouts. (Contacts does not include any D&B fields.)
16. If you use the Do Not Auto-Update validation rule provided in the Data.com Reports AppExchange package, add the `Data.com Does Not Auto-Update` field.
17. If you use Data.com Premium Prospector, from the object management settings for D&B Companies, go to Page Layouts.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To customize page layouts:
- "Customize Application"

To view page layouts:
- "View Setup"

18. Add the **Search Global Ultimate D-U-N-S** button.

SEE ALSO:

[Set Up Data.com Clean]

[Prevent Data.com Clean Jobs from Updating Records]

Set Field-Level Security for Data.com

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set field-level security:

- "Customize Application"

If your organization uses Data.com Prospector or Data.com Clean, you can view a number of D&B fields on account records, and those fields are included when users manually clean records. To make sure your users can read and edit the fields and their values, and that they appear on the Account Card, you need to set field-level security.

Set field-level security for these fields.

- `Account Site`
- `D&B Company` (Data.com Premium Prospector only)
- `D-U-N-S Number`
- `NAICS Code`
- `NAICS Description`
- `Ownership`
- `SIC Code`
- `Ticker Symbol`
- `Tradestyle`
- `Year Started`

There are multiple ways to set field-level security (such as by profile or permission set), but because you need to set field-level security for only ten fields, we recommend starting from the fields and choosing the user profiles for users who use Data.com.

1. From the management settings for accounts, go to the fields section.
2. Click the field label to open the detail page for each of the fields.
3. On each field's detail page, click `Set Field-Level Security`. For each profile whose users need to read and edit the fields, select **Visible**. For example, if users in the Standard User profile will use Data.com Clean, select **Visible** for that profile.

Note: Because these fields are maintained by Data.com Clean, making them editable by setting the field-level security to **Visible** could create mismatched data when a Clean job is run.

SEE ALSO:

[Set Up Data.com Clean]

Define Your Preferences and Select an Account Matching Service for Data.com Clean

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement Data.com:
- "Customize Application"

Clean preferences let you specify which objects' records you want to clean and how you want to clean them. This includes selecting the matching service that's used to clean accounts.

If your organization does not have a Data.com Clean license, you won't be able to select preferences for jobs.

1. Review the guidelines for selecting a matching service that's used to clean accounts.
2. From Setup, enter `Preferences` in the `Quick Find` box, then select **Preferences** under the Clean section.
3. Select the matching service for cleaning accounts. If you select D&B DUNSRight™ matching service, adjust your confidence code if needed.
   D&B's Confidence Code ranks Data.com match candidates based on how similar they are to your record, from 1 (not similar) to 10 (identical or highly similar). We won't *automatically* match any Data.com record below the code you select here, and if we have multiple records at or above your selection, we'll match the best quality record. When you *manually* clean a record, you may be able to select a match between our preset confidence code (5) and the code you select here.
4. Review the guidelines for selecting job preferences.
5. Make sure the `Enable Clean jobs` checkbox is selected for each object whose records you want to clean. If your organization has a Data.com Premium Clean license and you want to clean D&B Company records, select the `Enable Clean jobs for D&B Companies` checkbox.
6. For each object you've enabled, select your clean preference.
7. Save your preferences.

IN THIS SECTION:

Guidelines for Selecting an Account Matching Service

If you use Data.com Prospector or Data.com Clean, you can select the matching service your organization uses to clean account records. It's important to understand each service, its clean behaviors, and related considerations before selecting your service.

Guidelines for Selecting Data.com Clean Job Preferences

Before you define your Data.com Clean jobs, it's important to understand the preferences you can set.

SEE ALSO:

Set Up Data.com Clean

Set Up Data.com Clean Jobs

Guidelines for Selecting an Account Matching Service

Guidelines for Selecting Data.com Clean Job Preferences

Guidelines for Selecting an Account Matching Service

If you use Data.com Prospector or Data.com Clean, you can select the matching service your organization uses to clean account records. It's important to understand each service, its clean behaviors, and related considerations before selecting your service.

The available matching services are:

Data.com matching

Data.com's own matching technology, which matches on the `Account Name`, `Billing Address`, `Website`, and `Phone` fields.

The Data.com matching service is always used when cleaning accounts that have a valid `D-U-N-S Number`, even if the DUNSRight matching service is selected.

D&B DUNSRight™ matching

D&B's proprietary data-quality technology, which uses a rigorous process to normalize data and match D&B company records to your account records. The process also employs the D&B Confidence Code, which ranks Data.com match candidates based on how similar they are to your record, from 1 (not similar) to 10 (identical or highly similar). D&B also provides letter-coded match grades for individual fields. For details about how D&B DUNSRight matching works, see *D&B Entity Matching*.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Attribute	Data.com matching	DUNSRight™ matching
Default matching service	☑	
Includes D&B's Confidence Code		☑
Supports broad international matching[1]		☑
Supports non-English speaking countries		☑
Requires default mapping for `D-U-N-S Number`		☑

[1] D&B DUNSRight matching provides matching records for over 200 more countries than Data.com matching. DUNSRight matching *does not* support these countries and regions: Admiralty Islands; Åland Islands; Antarctica; Ascension Island; Bonaire; Bouvet Island; British Indian Ocean Territory; Caroline Islands; Cocos (Keeling) Islands; Cuba; Curaçao; French Southern Territories; Guernsey; Heard Island and McDonald Islands; Isle of Man; Jersey; Korea, Democratic People's Republic of; Mayotte; Micronesia, Federated States of; Midway Islands; Mongolia; Niue; Palau; Palestinian Territory Occupied; Pitcairn; Saint Barthélemy; Saint Eustatius and Saba; Saint Martin (French part); Sint Maarten (Dutch part); South Georgia; South Sandwich Islands; Svalbard and Jan Mayen; Timor Liste; Turkish Cyprus; United States Minor Outlying Islands; Wake Island; Wallis and Futuna; Western Sahara.

SEE ALSO:

Set Up Data.com Clean
Considerations for Scheduling Data.com Clean Jobs
Guidelines for Selecting Data.com Clean Job Preferences
Set Up Data.com Clean Jobs
Define Your Preferences and Select an Account Matching Service for Data.com Clean

Guidelines for Selecting Data.com Clean Job Preferences

Before you define your Data.com Clean jobs, it's important to understand the preferences you can set.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

- Data.com Clean offers three options for cleaning your data with jobs. Jobs can:
  - `Flag all differences per record` to *only identify* fields whose values are different from Data.com values
  - `Flag differences and auto-fill blank fields` to identify fields whose values are different *and fill blank fields* with values from Data.com.
  - `Customize settings field by field`.
- If you select the `Customize` option for any object, you can:
  - Flag fields on your Salesforce records that have different values from matched Data.com records.
  - Flag different field values on your Salesforce records and automatically fill blank fields with Data.com values.
  - Overwrite different field values on your Salesforce records with Data.com values. If you overwrite Salesforce record values, you should set history tracking for those fields.
- You can set flag-only and flag and auto-fill preferences for entire records or by field. You set overwrite preferences by field.
- If you use Data.com Premium Clean, you can also clean D&B Company records that are linked to accounts and leads. D&B Company clean jobs automatically fill or overwrite field values on D&B company records, but do not change data on linked account or lead records.
- Your preferences take effect when the next scheduled clean job runs, and users will see the flags, as appropriate, when they clean records manually.
- If, after changing matching services, you want to do a one-time rematch using the new matching service, you can manually remove the `D-U-N-S Number` on account records to force the matching service to rematch the records. Be aware that this might affect your match rates.
- We don't recommend mapping a custom field or skipping mapping for either matching service.
- Converted leads are excluded from Lead clean jobs.
- If you select a field to be overwritten by Clean jobs, and a user marks that field as *`wrong`* on a record, jobs will not overwrite that field on that record.
- Person accounts are excluded from Account and Contact clean jobs.

SEE ALSO:

Set Up Data.com Clean

Set Up Data.com Clean Jobs

Define Your Preferences and Select an Account Matching Service for Data.com Clean

Guidelines for Selecting an Account Matching Service

Set Up Data.com Clean Jobs

If your organization has a Data.com Clean license, you can set up automated jobs to clean your records.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

IN THIS SECTION:

Considerations for Scheduling Data.com Clean Jobs

Here's some things to understand before you start keeping your records clean automatically with jobs.

Schedule Data.com Clean Jobs

To keep your records' clean status up to date, schedule automated jobs to compare your records with Data.com. Jobs are only available to organizations with a Data.com Clean license.

Schedule a Full Sync of Your Salesforce Account Records with Data.com Clean

If you use the D&B DUNSRight™ Matching service, you can schedule a full sync of your account records with Data.com's the next time your account clean jobs run. The full sync compares all of your account records with records from Data.com, and may find matches for records that were not matched during previous jobs.

Prevent Data.com Clean Jobs from Updating Records

You can prevent individual account, contact, and lead records from being updated with Data.com data when automated jobs run.

Review Data.com Clean Job History

The Data.com Clean Job History table lets you review your current jobs and access job error logs.

Considerations for Scheduling Data.com Clean Jobs

Here's some things to understand before you start keeping your records clean automatically with jobs.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Important: If you have set up triggers to run when account, contact, or lead records are updated, and your triggers perform SOQL queries, the queries may interfere with jobs for those objects. Your Apex triggers (combined) can't exceed 200 SOQL queries per batch. If they do, your job for that object will fail. In addition, if your triggers are @future methods, they are subject to a limit of 10 @future calls per batch.

- Jobs are only available to organizations with a Data.com Clean license.
- You must have jobs scheduled for at least one day in a week them to run.
- Jobs only process records of enabled objects
- In a full sync job, all records are cleaned, regardless of their clean status. In an *incremental sync* job, only records with a `Not Compared` clean status are cleaned.
- When a full sync job runs, it runs instead of an incremental sync job.
- If a full sync job is scheduled to run, it runs even if no records have changed.
- The duration between jobs is counted from the time the previous job finishes to the start of the next job.
- Jobs are queued according to your scheduling settings, and they run independently for accounts, contacts, and leads. If you use Data.com Social Key, jobs also run a process that finds and associates social handles for your contacts and leads.
- How long it takes for a job to complete depends on several things, including which matching service you've selected (for account jobs), how many records your job cleans, and overall Salesforce performance. Using Data.com matching, it takes about a day for jobs to clean 3,000,000 records. Using DUNSRight™ matching, it takes about a day for jobs to clean 750,000 records.
- Jobs scheduled in a sandbox environment expire after 30 days.

- For best results, we recommend including a valid value for the `Country` and `State/Province` fields.
- Jobs do not process person account records.

SEE ALSO:

Set Up Data.com Clean

Set Up Data.com Clean Jobs

Guidelines for Selecting an Account Matching Service

Schedule Data.com Clean Jobs

To keep your records' clean status up to date, schedule automated jobs to compare your records with Data.com. Jobs are only available to organizations with a Data.com Clean license.

1. Review the considerations before scheduling jobs.
2. From Setup, enter *`Jobs`* in the `Quick Find` box, then select **Jobs** under the Clean section.
3. Select the days of the week when you want jobs to run.
4. Select your preferred start time.

   Note: Jobs run independently, so their exact start times may vary.
5. Click **Save**.

SEE ALSO:

Set Up Data.com Clean

Set Up Data.com Clean Jobs

Considerations for Scheduling Data.com Clean Jobs

Review Data.com Clean Job History

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To schedule Data.com Clean jobs and view job history:
- "Customize Application"

Schedule a Full Sync of Your Salesforce Account Records with Data.com Clean

If you use the D&B DUNSRight™ Matching service, you can schedule a full sync of your account records with Data.com's the next time your account clean jobs run. The full sync compares all of your account records with records from Data.com, and may find matches for records that were not matched during previous jobs.

After the requested full sync has run, the option is turned off. You can turn it back on and schedule another full sync every 30 days. We'll let you know when your full sync is in progress, or how long it's been since your last full sync was run.

1. From Setup, enter *`Jobs`* in the `Quick Find` box, then select **Jobs** under Data.com.
2. Click the button next to **Full Sync With Next Job** to turn full sync **On**.
   After the requested full sync runs, the button changes to **Off**.

SEE ALSO:

Set Up Data.com Clean

Set Up Data.com Clean Jobs

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To schedule Data.com Clean jobs and view job history:
- "Customize Application"

Prevent Data.com Clean Jobs from Updating Records

You can prevent individual account, contact, and lead records from being updated with Data.com data when automated jobs run.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

IN THIS SECTION:

Use Skipped Clean Status to Prevent Data.com Clean Jobs from Updating Records

Use the `Skipped records` Data.com Clean job bypass preference, which makes sure records with a `Clean Status` of `Skipped` are not updated by jobs. This is the recommended method of preventing jobs from updating records.

Use Custom Fields and Validation Rules to Prevent Data.com Clean Jobs from Updating Records

Use a custom field to identify the records you don't want auto-updated. Then, create a validation rule that tells jobs to skip these records.

SEE ALSO:

Set Up Data.com Clean Jobs

Set Up Data.com Clean

Can I prevent Data.com Clean jobs from automatically updating records?

Use `Skipped` Clean Status to Prevent Data.com Clean Jobs from Updating Records

Use the `Skipped records` Data.com Clean job bypass preference, which makes sure records with a `Clean Status` of `Skipped` are not updated by jobs. This is the recommended method of preventing jobs from updating records.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set job preferences:
- "Customize Application"

To create Apex classes and triggers:
- "Author Apex"

1. From Setup, enter *`Preferences`* in the `Quick Find` box, then select **Preferences** under the Clean section.
2. Select `Skipped records` from the Job Bypass Preferences for Accounts, Contacts, and Leads jobs.
3. Save your preferences.
4. Set the `Clean Status` to *`Skipped`* for records that you don't want jobs to update.

   Tip: You can use the Salesforce API, the Data Loader, or an Apex trigger to set the `Clean Status` for multiple records.

5. To make sure the `Clean Status` for `Skipped` records does not change when records are updated, create an Apex trigger.
   When a record is updated, the trigger sets its `Clean Status` back to `Skipped`. Then, jobs won't update the record.

SEE ALSO:

Use Custom Fields and Validation Rules to Prevent Data.com Clean Jobs from Updating Records

Use Custom Fields and Validation Rules to Prevent Data.com Clean Jobs from Updating Records

Use a custom field to identify the records you don't want auto-updated. Then, create a validation rule that tells jobs to skip these records.

Important: If you create a validation rule to prevent auto-updates, keep this best practice in mind.

The validation rule generates entries and related messages in Data.com Clean job logs, but your jobs may generate other entries and errors, as well, so make sure that you examine your job logs carefully.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To create or change custom fields:
- "Customize Application"

To define or change field validation rules:
- "Customize Application"

To view field validation rules:
- "View Setup Configuration"

1. Create a custom field for each object in which there are records you want to prevent Clean jobs from automatically updating.
   Here's an example of how to define the custom field.

Field	Value or Selection
Field Type	Checkbox
Field Label	*Data.com Does Not Auto-Update*
Default Value	Unchecked
Description	*Prevents automated Clean jobs from updating fields with the matched Data.com record's values.*
Help Text	*Exclude this record from automated field updates from Data.com Clean jobs*

2. To block auto-updates on records that have `Data.com Does Not Auto-Update` (or whatever you've named the custom field) selected, create a validation rule.

   Here's an example of how to define the validation rule for each object.

Field	Value or Selection
Rule Name	*Block_autoupdate_from_Data_com*
Description	*Record-level prevention of automated Clean jobs from automatically updating field values.*
Error Condition Formula (for Accounts)	(***YOUR CUSTOM FIELD API NAME***) && ($User.Alias = "autocln") && (ISCHANGED(DunsNumber) || ISCHANGED(NumberOfEmployees) || ISCHANGED(AnnualRevenue) || ISCHANGED(TickerSymbol) || ISCHANGED(Website) || ISCHANGED(Industry) || ISCHANGED(Ownership) || ISCHANGED(BillingCity) || ISCHANGED(

Field	Value or Selection
	BillingCountry) || ISCHANGED(BillingState) || ISCHANGED(BillingStreet) || ISCHANGED(BillingPostalCode) || ISCHANGED(Phone) || ISCHANGED(Fax) || ISCHANGED(Site) || ISCHANGED(Tradestyle) || ISCHANGED(YearStarted) || ISCHANGED(Sic) || ISCHANGED(SicDesc) || ISCHANGED(NaicsCode) || ISCHANGED(NaicsDesc) || ISCHANGED(Description))
Error Condition Formula (for Contacts)	(***YOUR CUSTOM FIELD API NAME***) && ($User.Alias = "autocln") && (ISCHANGED(Title) || ISCHANGED(Email) || ISCHANGED(Phone) || ISCHANGED(MailingStreet) || ISCHANGED(MailingCity) || ISCHANGED(MailingState) || ISCHANGED(MailingCountry) || ISCHANGED(MailingPostalCode))
Error Condition Formula (for Leads)	(***YOUR CUSTOM FIELD API NAME***) && ($User.Alias = "autocln") && (ISCHANGED(Company) || ISCHANGED(Title) || ISCHANGED(Email) || ISCHANGED(Phone) || ISCHANGED(Street) || ISCHANGED(City) || ISCHANGED(State) || ISCHANGED(PostalCode) || ISCHANGED(Country) || ISCHANGED(NumberOfEmployees) || ISCHANGED(AnnualRevenue) || ISCHANGED(Industry) || ISCHANGED(CompanyDunsNumber))
Error Message	*This record has been excluded from automated field updates from Data.com Clean jobs.*

3. Open each record that you don't want to be auto-updated, and select `Do Not Auto-Update` (or whatever you've named the custom field).
   When automated jobs run, for each record that is not updated, you see a message in the job log: "`This record has been excluded from automated field updates from Data.com Clean jobs.`"

   Tip: You can use the Data Loader or a custom trigger to select this checkbox for multiple records.

SEE ALSO:

Use Skipped Clean Status to Prevent Data.com Clean Jobs from Updating Records

Review Data.com Clean Job History

The Data.com Clean Job History table lets you review your current jobs and access job error logs.

Important: If you use the Do Not Auto-Update validation rule to prevent selected records from being automatically updated by Data.com Clean jobs, make sure you understand its effects on Clean job logs. The rule generates entries and related messages in job logs, but your jobs may generate other entries and errors, as well. So make sure you examine your job logs carefully. The validation rule is available in the Data.com Reports AppExchange package.

1. From Setup, enter *`Jobs`* in the `Quick Find` box, then select **Jobs**.
2. View job details in the Clean Jobs History section.
3. If the job encountered errors when processing records, click the link in either the `Batch Errors` or `Entity Errors` columns to download the job log `.csv` file.

   We store job logs for 21 days.

Here are the definitions for the table columns.

Column Heading	Definition
`Date`	The date the job was run.
`Time Submitted`	The time the job was submitted to the job queue. Jobs run independently, so this might not be the exact time the job was run.
`Job Type`	The type of job: for Accounts, D&B Companies, Contacts, or Leads. There are multiple types of account jobs. `Account (Data.com Matching)`: the Data.com matching service was used to match the account records. `Account (DUNSRight Matching)`: the DUNSRight matching service was used to match the account records. `Account (D-U-N-S Number Lookup)`: the `D-U-N-S Number` field, if present, was used to rematch (or look up) the account records.
`Job Status`	The status of the job: `Queued`: the job is in the queue to run. For jobs in this status, the `Time Submitted` column displays a dash (–). `Preparing`: the job is being prepared to run. `Processing`: the job is in process. `Completed`: the job has finished running (with or without errors).

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To schedule Data.com Clean jobs and view job history:
- "Customize Application"

Column Heading	Definition
	`Failed`: the job failed to run. `Aborted`: the job was aborted before or while it ran.
`Records`	The total number of Salesforce records processed by the job.
`Matched`	The total number of Salesforce records the job matched to Data.com records.
`Unmatched`	The total number of Salesforce records the job did not match to Data.com records.
`Inactive`	The number of Salesforce records that are marked as `Inactive` in Data.com.
`Batch Errors`	The total number of batch errors a job encountered while it ran. A dash indicates either no errors or no data. If the job produces a batch error job log, click the link to download and open its .csv file.
`Entity Errors`	The total number of entity errors a job encountered while it ran. A dash indicates either no errors or no data. If the job produces an entity error job log, click the link to download and open its .csv file. There you'll find an explanation of any entity error that was produced because a record failed to save—for example, because of a validation rule failure. Entity errors usually result from validation rule failures or required field violation. If an explanation exists, we'll provide it. The unique ID of a record that produced an error during the job. To open the record, append the 15-digit ID to the URL of your Salesforce instance. For example: `https://na1.salesforce.com/`*`0013000000hKBTq`*.

SEE ALSO:

- Set Up Data.com Clean
- Set Up Data.com Clean Jobs

Review Triggers and Workflow Rules for Clean Compatibility

If your organization uses triggers or workflow rules on objects enabled for Clean (Account, Contact, Lead, or D&B Company), review the triggers and workflows and consider making adjustments or bypassing them so users don't encounter unexpected results when records are cleaned.

1. If you use triggers on any object that's cleaned manually or by Clean jobs, from the object's management settings, go to Triggers.
2. Open and examine each trigger to make sure that your system or users won't encounter any unexpected results when records are cleaned. If you find that one or two triggers might cause unexpected results, you may be able to adjust those triggers. If you use Clean jobs and find multiple triggers that may cause unexpected results, consider bypassing triggers when jobs are run. You can select that option on the Clean Preferences page: from Setup, enter *`Preferences`* in the `Quick Find` box, then select **Preferences** under Clean.
3. If you use workflows, from Setup, enter *`Workflow Rules`* in the `Quick Find` box, then select **Workflow Rules**.
4. Open and examine each workflow rule to make sure that your system or users won't encounter any unexpected results when records are cleaned. If you find that one or two workflow rules might cause unexpected results, you may be able to adjust those rules. If you use Clean jobs and find multiple rules that may cause unexpected results, consider bypassing workflow rules when jobs are run. You can select that option on the Clean Preferences page. You can select that option on the Clean Preferences page: from Setup, enter *`Preferences`* in the `Quick Find` box, then select **Preferences** under Clean.
5. For all triggers and workflow rules you're using, check results on affected object records after the next Clean job runs for that object.

Example: your organization has a trigger that creates and assigns a task every time a lead record is updated by any means. If you clean leads using Clean jobs, your users could get more tasks than expected, so you might want to adjust the trigger so that tasks are only created and assigned when records are *manually edited* or *cleaned by Salesforce users*. You can determine who last updated a record by checking the `Last Modified By` field. Records last updated by a Clean job show `Data.com Clean` in that field, and records updated by users show the first and last name of the user.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement Data.com Clean:
- "Customize Application"

To implement Data.com Prospector:
- "Customize Application"

To define triggers:
- "Author Apex"

To define workflow rules:
- "Customize Application"

Configure List Views for Data.com Clean

Before your Data.com Clean users can clean records from a list, you'll need to add the `Clean Status` field to your organization's list views.

1. Click the tab (Accounts, Contacts, or Leads) for the object whose records you want to clean from your list.

   Note: If your organization uses DUNSRight matching to clean account records, list view cleaning is not available for account records.

2. Select a view from the drop-down and click **Edit**.
3. Scroll down the Available Fields list to find the `Clean Status` field, then add it to the list of Selected Fields.
   The **Clean** button will automatically be added to the list view.
4. If you use Data.com Social Key, you can also add the fields for the social networks you've enabled (LinkedIn®, Twitter, or Facebook) to your contact list views.

   The social network fields aren't available on the lead list views.

SEE ALSO:

Set Up Data.com Clean

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To create custom list views:
- "Read" on the type of record included in the list

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

Find Out How Clean Your Accounts Are

If you use Data.com Clean, you can review the `Clean Status` on all your accounts by running a simple Accounts by Clean Status report.

Important: If your records appear to be matched incorrectly with Data.com records, think carefully before selecting `Flag differences and auto-fill blank fields` as a clean preference. If mismatches occur with a large number of your records, contact Salesforce Support.

1. Click the Dashboards tab, then select Data.com Analytics. Run the Accounts by Clean Status report.
   If your clean jobs have run successfully, you'll find your accounts grouped by their clean status values.
2. On the report, find any Salesforce records with a clean status of `Different`. Open several records and click **Clean** to look at the differences.
3. Repeat the comparison process with records that have a clean status of `Not Found`.

SEE ALSO:

How Are Salesforce and Data.com Records Matched?

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement Data.com Clean:
- "Customize Application"

Determine How Well Data.com Clean Is Working

Data.com Clean metrics and analytics tell you how your organization's accounts, contacts, and leads have been matched and updated with Data.com data, so it's important to check your match and update rates on a regular basis.

1. From Setup, enter *`Metrics`* in the `Quick Find` box, then select **Metrics & Analytics** under the Clean section.
2. To find out when the last calculation occurred, check the `Last Calculated` field above the table.

   Note: The data in the tables is calculated daily, but we store the time and calculate the date based on GMT, so depending on time adjustments, the date shown may be different from the date when the calculations occurred. Also, because this data is calculated once per day, it may differ slightly from the data in Data.com dashboards and reports.

3. View match and update information in the Match and Update Rates section.

   The data represents records that have been matched and updated since your organization implemented Data.com. Here are the definitions for the table columns.

Column	Definition
`Records`	The object enabled for Data.com Clean: accounts, contacts, or leads. Note: If your Salesforce organization uses person accounts, the figures in the `Total` and `Processed` columns may differ. Person accounts are included in the account total, but are not processed by Data.com Clean jobs.
`Total`	The number of object records (accounts, contacts, or leads) that your organization has in Salesforce.
`Processed`	The number of each type of Salesforce record (accounts, contacts, or leads) processed by Data.com Clean.
`Matched`	The number of each type of processed Salesforce record (accounts, contacts, or leads) that match with Data.com records.
`Updated`	The number of each type of processed Salesforce record (accounts, contacts, or leads) that have been updated.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To view Data.com Clean match rates:
- "Customize Application"

Column	Definition
`Records`	The object enabled for Data.com Clean: accounts, contacts, or leads.
`Match Rate (% of Processed)`	The percentage of each type of processed Salesforce record (accounts, contacts, or leads) that match with Data.com records.
`Update Rate (% of Processed)`	The percentage of each type of processed Salesforce record that have been updated.

SEE ALSO:

How Are Salesforce and Data.com Records Matched?

Guidelines for Selecting an Account Matching Service

Report on Salesforce Records with a Specific Data.com Clean Status

Create a custom report to show Salesforce account, contact, or lead records that have a specific clean status (such as `Different`).

Choose fields to display from the Account, Contact, or Lead objects. Using data from companion Clean Info objects, show Salesforce and Data.com record values side by side. Report results can help you identify consistent reasons records might have a specific clean status. Use what you learn to manage how records are cleaned in your organization.

For example, you can create a report to show all records whose clean status is `Different` side by side with their matched Data.com records. If you identify patterns in your data that cause this status, you might create triggers or API customizations to adjust your data and have more records with `In Sync` status.

Let's create a Contacts by Clean Status report.

1. Before you can create the Contacts by Clean Status report, make sure your organization has a custom report type that links the Contact object to the Contact Clean Info object and makes fields from both objects available to report on.
2. Create your report: click the Reports tab, then click **New Report**.
3. Select *`Contacts by Clean Status`* as the report type.
4. Click **Create**.
5. From the parent object, Contacts, select the fields you want to report on. For example, you might choose:
   - `Contact ID`
   - `Clean Status`
   - `Full Name`
   - `Mailing Address`
   - `Phone`
   - `Email`

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To create, edit, and delete reports:

- "Create and Customize Reports"

  AND

  "Report Builder"

6. From the related object, Contact Clean Info, select fields that correspond to the Contact object fields. For contact clean info, you might choose:
   - `Contact Clean Info ID`
   - `First Name`
   - `Last Name`
   - `Address`
   - `Phone`
   - `Email`
   - `Last Match Date`
7. Add a field filter to the report: For the field, select *`Clean Status`*. For the operator, select *`equals`*, and for the value, select *`Different`*.
8. Define the remaining fields.
9. Save the report and run it.
10. Examine the report to see if you can identify patterns in your data that cause certain records to have a clean status of `Different`.

SEE ALSO:

Create a Custom Report Type for Account, Contact, or Lead Clean Info

What's the Account Clean Info Object?

What's the Contact Clean Info Object?

What's the Lead Clean Info Object?

Set Up Clean Rules

Help your sales and marketing teams maintain great relationships with customers and pursue the most promising leads and opportunities by automatically enriching your Salesforce accounts, contacts, and leads with the latest information. It's all done using Data.com clean rules.

IN THIS SECTION:

What Are Clean Rules?

Clean rules keep your data squeaky clean, complete, and up-to-date. Just set up and activate your organization's Data.com clean rules. Then, information—from geocodes for addresses on accounts to company information for leads—is automatically added to existing *and* new Salesforce records. With clean rules, maintaining high-quality data is a piece of cake!

Automatically Get Geocodes for Addresses

Help your sales and marketing teams find nearby prospects, assign territories and campaigns, and more! All this is a cinch with geocodes. In just a few clicks, you can automatically get geocodes for addresses on accounts, contacts, and leads.

Automatically Enrich Leads with Critical Company Information (Beta)

Make it easier for your sales and marketing reps to pursue the most promising leads and immediately assign them to the right territories and campaigns. If your organization has a Data.com Premium Clean license, then it's easy to enrich your leads with valuable company information like annual revenue, industry, D-U-N-S number, and number of employees.

Standard Data.com Clean Rules

Learn key details about the standard clean rules, which help you automatically add information to your Salesforce records. Find a description of how each clean rule works and the fields it updates.

Guidelines for Determining How Well Clean Rules Are Working

Do you want to know how well Data.com Clean is working for your organization? Check out the Clean Vitals page, which shows the match rate for your clean rules. You'll see the percentage of processed records that Data.com matched to a record in the data service. When a record's matched, it can be updated with the latest data.

What Are Clean Rules?

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Geocode clean rules available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Other clean rules available with a Data.com Premium Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Clean rules keep your data squeaky clean, complete, and up-to-date. Just set up and activate your organization's Data.com clean rules. Then, information—from geocodes for addresses on accounts to company information for leads—is automatically added to existing *and* new Salesforce records. With clean rules, maintaining high-quality data is a piece of cake!

Clean rules are a Data.com Clean feature, but you don't need a Data.com license to use every clean rule. For example, geocode clean rules are available to everyone! Clean rules are independent of other clean features, though clean rules may update the same records as other clean features like Clean jobs.

So how do these mysterious clean rules work?

It's simple! Clean rules control how your Salesforce records are cleaned.

When you clean a record, you compare it to a matching record from a data service. Then, you update and enrich your record using values from the matching record. It sounds easy, but how do you determine the fields to update and the data service to use? And how do you make sure that triggers aren't activated and workflow rules don't run during cleaning? That's where clean rules come in.

A clean rule is used every time a record is cleaned to specify things like:

- The data service for cleaning, which includes source that your records are compared to and the processes that figures out if your records match records from the data source
- The object that's cleaned
- The fields used to match your records with records from the data service
- The fields that are updated when a match is found
- How fields are updated when records are cleaned (for example, values on Salesforce fields are overwritten with data from the data service)
- If triggers and workflow rules run when records are cleaned

After you activate a rule, it immediately goes to work. New and updated records are automatically cleaned when they're saved. In addition, you can manually clean individual records at any time, and you can set up the rule to clean all your existing records.

Example: You have an app that assigns leads to territories based on the latitude and longitude of lead addresses. There's just one problem: Your lead addresses in Salesforce don't have updated values for latitude and longitude. No need to worry! Just set up and activate the `Geocodes for Lead Address` clean rule. Then, geocode information is automatically added to all your existing *and* new leads. Here's a summary for this rule.

Attribute	**Value**
Name	`Geocodes for Lead Address`
Data Service	Data.com Geo
Object	Lead

Attribute	Value
Fields Cleaned	Latitude, longitude, and accuracy fields associated with the `Address` field: • `Latitude` • `Longitude` • `GeocodeAccuracy` Note: These fields can't be added to the page layout. However, you can view them using custom formula fields or by querying the Salesforce API.
How Fields Are Updated	Overwrite
Clean All Records When the Rule Is Activated or Saved	Yes
Bypass Triggers?	Yes
Bypass Workflow Rules?	Yes
Do Not Update Last Modified Info	Yes

SEE ALSO:

Set Up Clean Rules

Standard Data.com Clean Rules

Automatically Get Geocodes for Addresses

Help your sales and marketing teams find nearby prospects, assign territories and campaigns, and more! All this is a cinch with geocodes. In just a few clicks, you can automatically get geocodes for addresses on accounts, contacts, and leads.

Important: Geocodes are added to records using Data.com technology. However, a Data.com license is *not* required to use this feature.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

IN THIS SECTION:

Considerations for Setting Up Geocode Clean Rules

Review these considerations before adding geocode information to Salesforce accounts, contacts, and leads using Data.com geocode clean rules.

Set Up Geocode Clean Rules

In a few steps, you can set up and activate your Data.com geocode clean rules. Then, geocodes are automatically added to existing accounts, contacts, and leads. New accounts, contacts, and leads get this information when they're saved.

Guidelines for Setting Up Geocode Clean Rules

Follow some important guidelines when automatically adding geocode information to Salesforce records with Data.com.

Check the Clean Status of Geocode Clean Rules

The Data.com geocode clean rules automatically add geocodes for addresses on your accounts, contacts, and leads. You can check whether an individual record was processed with a geocode clean rule and the status of that processing. If you'd like to test the clean rule, you can manually clean the record using the clean rule. Remember: With clean rules, your records are automatically cleaned, so manually cleaning a record isn't necessary.

Verify That Geocodes Were Added to Records

Since geocodes fields not typically visible on a record, you need to complete a few steps to verify that geocodes were added to Salesforce records with a Data.com geocode clean rule.

Geocode Fields

Geocode information identifies a location using a latitude, a longitude, and an accuracy rating. Geocode fields are available for standard addresses on accounts, contacts, and leads in Salesforce. Geocode fields are not visible on records, but they can be viewed using the Salesforce API.

Considerations for Setting Up Geocode Clean Rules

Review these considerations before adding geocode information to Salesforce accounts, contacts, and leads using Data.com geocode clean rules.

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Important: Geocodes are added to records using Data.com technology. However, a Data.com license is *not* required to use this feature.

- When geocode information is added to records:
  - Existing values in geocode information fields are overwritten.
  - The `SystemModStamp` field is always updated. Review any integrations that use this field to make sure that they aren't affected.
  - The `LastModifiedDate` and `LastModifiedById` fields are *not updated*. This is the default option. You can change it when you set up your geocode clean rules.
- Geocode information is not visible on records. However, it can be viewed using the Salesforce API. Also, you can create custom fields using formulas to show geocode information fields on records.
- Status information associated with clean rules can't be copied to or from a sandbox. For example, in your production organization, you activate your `Geocodes for Lead Address` clean rule, and geocode information is successfully added to all of your existing leads. As a result, the status of the `Geocodes for Lead Address` clean rule for each lead is `In Sync`. You can't copy this status information for records to your sandbox. To get status information in your sandbox, you need to activate your clean rules and process your records in your sandbox.

SEE ALSO:

Set Up Geocode Clean Rules

Set Up Geocode Clean Rules

In a few steps, you can set up and activate your Data.com geocode clean rules. Then, geocodes are automatically added to existing accounts, contacts, and leads. New accounts, contacts, and leads get this information when they're saved.

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

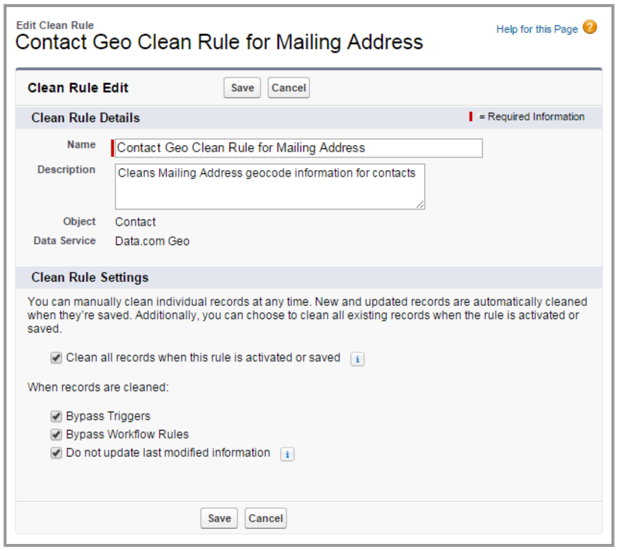
To set up and activate clean rules:

- "Customize Application"

Important: Geocodes are added to records using Data.com technology. However, a Data.com license is *not* required to use this feature.

Walk Through It: Set Up Geocode Clean Rules

1. From Setup, enter `Clean Rules` in the `Quick Find` box, then select **Clean Rules**.
2. Edit a geocode clean rule. There are four geocode clean rules available.
3. Review your clean rule settings.



Edit Clean Rule

Contact Geo Clean Rule for Mailing Address

Clean Rule Details

Name: Contact Geo Clean Rule for Mailing Address

Description: Cleans Mailing Address geocode information for contacts

Object: Contact

Data Service: Data.com Geo

Clean Rule Settings

You can manually clean individual records at any time. New and updated records are automatically cleaned when they're saved. Additionally, you can choose to clean all existing records when the rule is activated or saved.

☑ Clean all records when this rule is activated or saved

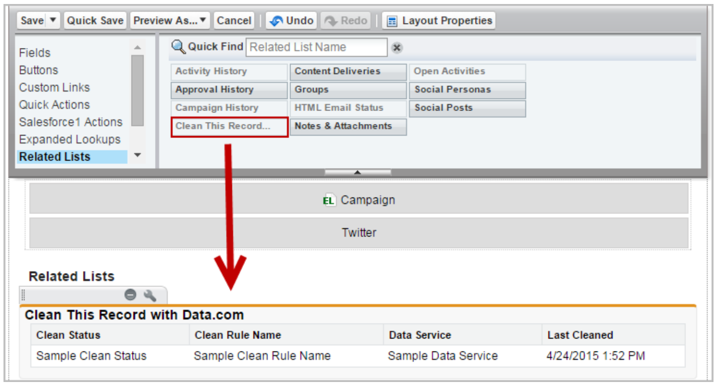
When records are cleaned:

☑ Bypass Triggers

☑ Bypass Workflow Rules

☑ Do not update last modified information

4. Save the rule.
5. Activate the rule.
   If `Clean all records when this rule is activated or saved` is selected, geocodes are automatically added to all existing records. New records automatically get geocodes when they're saved. Existing geocode values are overwritten.
6. Repeat this process for the other geocode clean rules.
7. In Salesforce Classic, if you want to be able to check the clean status of the geocode clean rules, add the `Clean This Record with Data.com` related list to the page layout for accounts, contacts, and leads. (In Lightning Experience, this step isn't necessary!)



Clean This Record with Data.com

Clean Status	Clean Rule Name	Data Service	Last Cleaned
Sample Clean Status	Sample Clean Rule Name	Sample Data Service	4/24/2015 1:52 PM

SEE ALSO:

- Considerations for Setting Up Geocode Clean Rules
- Check the Clean Status of Geocode Clean Rules
- Verify That Geocodes Were Added to Records
- Geocode Fields

Guidelines for Setting Up Geocode Clean Rules

Follow some important guidelines when automatically adding geocode information to Salesforce records with Data.com.

Important: Geocodes are added to records using Data.com technology. However, a Data.com license is *not* required to use this feature.

- When geocode information is added to a record using Data.com geocode clean rules, the record's last modified information is not updated. This prevents any of your organization's automated processes from being affected. If you want last modified information to be updated, unselect `Do not update last modified information` on your geocode clean rules.

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

SEE ALSO:

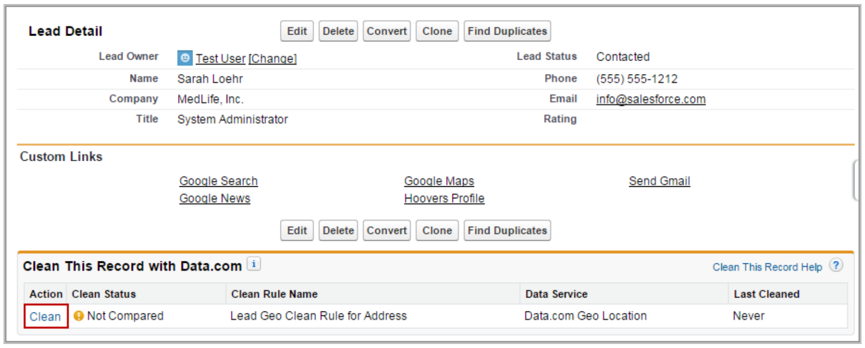
- Set Up Geocode Clean Rules

Check the Clean Status of Geocode Clean Rules

The Data.com geocode clean rules automatically add geocodes for addresses on your accounts, contacts, and leads. You can check whether an individual record was processed with a geocode clean rule and the status of that processing. If you'd like to test the clean rule, you can manually clean the record using the clean rule. Remember: With clean rules, your records are automatically cleaned, so manually cleaning a record isn't necessary.

Important: Geocodes are added to records using Data.com technology. However, a Data.com license is *not* required to use this feature.

1. Open the record that you're checking.
2. Review the clean status for the record's geocode clean rule. For example, if you're checking a lead, you'll review the clean status for the `Geocodes for Lead Address` clean rule. In Salesforce Classic, you'll find this status in the Clean This Record with Data.com section. (If you can't find the Clean This Record section, ask your Salesforce admin to add it to your page layout.) In Lightning Experience, click the `Check Clean Status` quick action to view the clean rule statuses.
3. To manually clean the record, click **Clean** for the geocode clean rule.



Lead Detail

Lead Owner: Test User [Change]
Lead Status: Contacted
Name: Sarah Loehr
Phone: (555) 555-1212
Company: MedLife, Inc.
Email: info@salesforce.com
Title: System Administrator
Rating:

Custom Links

Clean This Record with Data.com

Action	Clean Status	Clean Rule Name	Data Service	Last Cleaned
Clean	Not Compared	Lead Geo Clean Rule for Address	Data.com Geo Location	Never

If your record matches a record in the geocode data service, values for the geocode information fields are added, and any existing values are overwritten. The `Clean Status` for the clean rule is updated.

Note: If you change the address on a record, the `Clean Status` for the clean rule is set to `Not Compared` until the record is cleaned again. Fortunately, with geocode clean rules, the record is automatically cleaned again almost immediately!

4. Verify that geocodes were added to the record.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To clean accounts with a geocode clean rule:
- "Edit" on accounts

To clean contacts with a geocode clean rule:
- "Edit" on contacts

To clean leads with a geocode clean rule:
- "Edit" on leads

Verify That Geocodes Were Added to Records

Since geocodes fields not typically visible on a record, you need to complete a few steps to verify that geocodes were added to Salesforce records with a Data.com geocode clean rule.

Important: Geocodes are added to records using Data.com technology. However, a Data.com license is *not* required to use this feature.

Tip: You can add geocode fields to the page layout using custom formula fields.

1. Review the geocode rule clean status.
    - a. Open a record.
    - b. Review the geocode rule clean status, which is listed in the Clean This Record section.

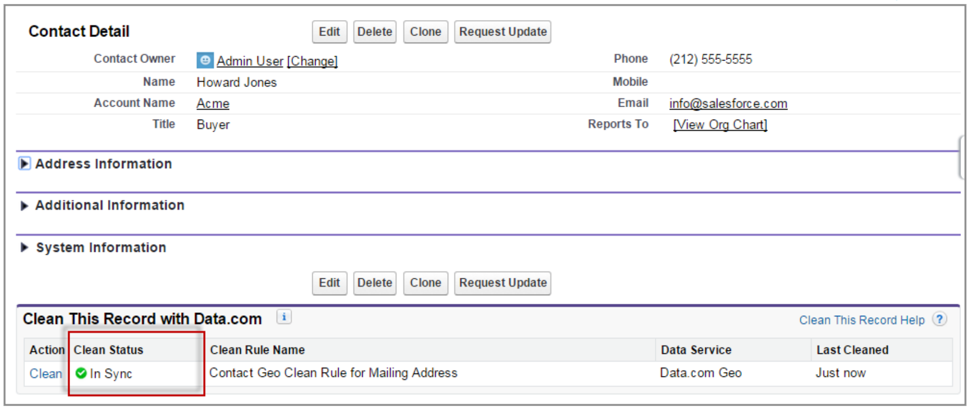
EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To use the Salesforce API:
- "API Enabled"



Contact Detail

Contact Owner	Admin User [Change]	Phone	(212) 555-5555
Name	Howard Jones	Mobile	
Account Name	Acme	Email	info@salesforce.com
Title	Buyer	Reports To	[View Org Chart]

Clean This Record with Data.com

Action	Clean Status	Clean Rule Name	Data Service	Last Cleaned
Clean	✓ In Sync	Contact Geo Clean Rule for Mailing Address	Data.com Geo	Just now

If the geocode rule's clean status is set to `In Sync`, the record has up-to-date geocode information from the data service. If you see another status, you can manually clean the record by clicking **Clean**.

2. Make sure that there are values in the geocode fields using the Salesforce API.
    - a. Get the value of the `Id` field for a record.
    - b. Using the `Id`, query the address fields and geocode fields. (Alternatively, you can query all records or the first *X* number of records for an object.)

      Example: Salesforce Object Query Language (SOQL) Query for Contacts

```
SELECT Name, Email, MailingAddress, MailingCity, MailingState, MailingCountry,
MailingLatitude, MailingLongitude, MailingGeocodeAccuracy
FROM Contact
WHERE Id IN (’003D000000QRoqW’, ‘003R0000001ySoG’, ‘003D000000QRoqU’);
```

    - c. Verify that there are values for the geocode information fields.

SEE ALSO:

Set Up Geocode Clean Rules

Geocode Fields

Geocode Fields

Geocode information identifies a location using a latitude, a longitude, and an accuracy rating. Geocode fields are available for standard addresses on accounts, contacts, and leads in Salesforce. Geocode fields are not visible on records, but they can be viewed using the Salesforce API.

Object	Standard Address	Geocode Fields
Account	`Billing Address`	• `BillingLatitude` • `BillingLongitude` • `BillingGeocodeAccuracy`
Account	`Shipping Address`	• `ShippingLatitude` • `ShippingLongitude` • `ShippingGeocodeAccuracy`
Contact	`Mailing Address`	• `MailingLatitude` • `MailingLongitude` • `MailingGeocodeAccuracy`
Lead	`Address`	• `Latitude` • `Longitude` • `GeocodeAccuracy`

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Accuracy Values

Accuracy tells you more about the location of a latitude and longitude. For example, `Zip` means the latitude and longitude indicate the point at the center of the zip code area for an address. In this case, a match for the exact street address couldn’t be found.

Accuracy Value	Description
`Address`	In the same building
`NearAddress`	Near the address
`Block`	Midway point of the block
`Street`	Midway point of the street
`ExtendedZip`	Center of the extended zip code area
`Zip`	Center of the zip code area
`Neighborhood`	Center of the neighborhood
`City`	Center of the city
`County`	Center of the county
`State`	Center of the state

Accuracy Value	Description
`Unknown`	No match for the address was found

SEE ALSO:

Set Up Geocode Clean Rules

Automatically Enrich Leads with Critical Company Information (Beta)

Make it easier for your sales and marketing reps to pursue the most promising leads and immediately assign them to the right territories and campaigns. If your organization has a Data.com Premium Clean license, then it's easy to enrich your leads with valuable company information like annual revenue, industry, D-U-N-S number, and number of employees.

Note: This feature is available through an open beta program. Unreleased services or features referenced in this document, press releases, or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based on features that are currently available. Salesforce Customer Support provides limited support for this feature during the beta period. Ask for help and provide feedback in the Lead Enrichment Group in the Salesforce Success Community.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Premium Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

IN THIS SECTION:

Considerations for Setting Up the Company Info for Leads Clean Rule

Review these considerations before automatically adding company information to Salesforce leads using Data.com clean rules.

Set Up the Company Info for Leads Clean Rule

Using the `Company Info for Leads` Data.com clean rule, you can add valuable company information like D-U-N-S number and number of employees to all your existing Salesforce leads. New and updated leads automatically get company information when they're saved.

Guidelines for Setting Up the Company Info for Leads Clean Rule

Follow some important guidelines when using Data.com clean rules to automatically enrich your Salesforce leads.

Check the Clean Status of the Company Info for Leads Clean Rule

The `Company Info for Leads` clean rule enriches your Salesforce leads with critical company informaton like annual revenue, D-U-N-S number, and number of employees. You can check whether an individual lead was processed with this clean rule and the status of that processing. If you'd like to test the clean rule, you can manually clean the record using the clean rule. Remember: With clean rules, your records are automatically cleaned, so manually cleaning a record isn't necessary.

Considerations for Setting Up the `Company Info for Leads` Clean Rule

Review these considerations before automatically adding company information to Salesforce leads using Data.com clean rules.

- Company information is only added to blank fields; existing values are not overwritten.
- If a lead has a value for the `City` or `Zip Code` field, company information for the domestic headquarters in that country is added to the lead. If there's no value for `Country` or no domestic headquarters location in the country, global headquarters information is added to the lead.
- When adding company information to lead using the `Company Info for Leads` clean rule, it does not affect any existing Data.com Clean jobs you run.
- Review your push notification settings prior to activating the `Company Info for Leads` clean rule. When company information is added to leads using this clean rule, push notifications may be triggered.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Premium Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

SEE ALSO:

Set Up the Company Info for Leads Clean Rule

Set Up the `Company Info for Leads` Clean Rule

Using the `Company Info for Leads` Data.com clean rule, you can add valuable company information like D-U-N-S number and number of employees to all your existing Salesforce leads. New and updated leads automatically get company information when they're saved.

Note: This feature is available through an open beta program. Unreleased services or features referenced in this document, press releases, or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based on features that are currently available. Salesforce Customer Support provides limited support for this feature during the beta period. Ask for help and provide feedback in the Lead Enrichment Group in the Salesforce Success Community.

1. From Setup, enter *`Clean Rules`* in the `Quick Find` box, then select **Clean Rules**.
2. Edit the `Company Info for Leads` clean rule.
3. Review your clean rule settings. To add company information to all existing leads, select `Clean all records when this rule is activated or saved`.
4. Save the rule.
5. Activate the rule.
   If you selected `Clean all records when this rule is activated or saved`, company information is added to all existing leads. New leads are automatically enriched with company information when they're saved. If you have existing data, it is not overwritten. Only blank fields are filled in.
6. In Salesforce Classic, if you want to be able to check the clean status of the `Company Info for Leads` clean rule, add the `Clean This Record with Data.com` related list to the page layout for leads. (In Lightning Experience, this step isn't necessary!)

EDITIONS

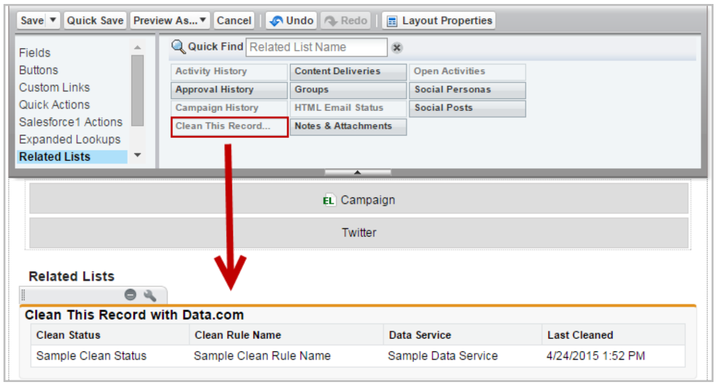
Available in: Salesforce Classic

Available with a Data.com Premium Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set up and activate clean rules:
- "Customize Application"

To edit page layouts:
- "Customize Application"



Clean This Record with Data.com

Clean Status	Clean Rule Name	Data Service	Last Cleaned
Sample Clean Status	Sample Clean Rule Name	Sample Data Service	4/24/2015 1:52 PM

SEE ALSO:

Considerations for Setting Up the Company Info for Leads Clean Rule

Set Up Clean Rules

Check the Clean Status of the Company Info for Leads Clean Rule

Guidelines for Setting Up the `Company Info for Leads` Clean Rule

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Premium Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Follow some important guidelines when using Data.com clean rules to automatically enrich your Salesforce leads.

Note: This feature is available through an open beta program. Unreleased services or features referenced in this document, press releases, or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based on features that are currently available. Salesforce Customer Support provides limited support for this feature during the beta period. Ask for help and provide feedback in the Lead Enrichment Group in the Salesforce Success Community.

- If you want your users to be able to manually add company information to leads using clean rules, you must set field-level security for the `Company D-U-N-S Number` and `D&B Company` fields so that users can update these fields.
- If you update the value for the `Company D-U-N-S Number` field, make sure to delete the values for the `D&B Company` and `No. of Employees` fields. Then, when you add company information to this record, updated values for these fields are added, and the correct D&B Company is linked to your lead.
- If you update the value for the `Email` field, make sure to delete values for the `Annual Revenue`, `Company D-U-N-S Number`, `D&B Company`, `Industry`, and `No. of Employees` fields. Then, when you add company information to this record, updated values for these fields are added.

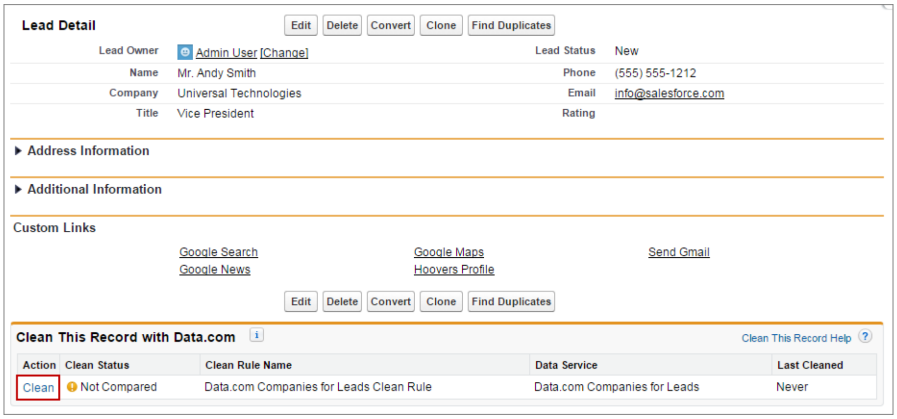
SEE ALSO:

Set Up the Company Info for Leads Clean Rule

Check the Clean Status of the `Company Info for Leads` Clean Rule

The `Company Info for Leads` clean rule enriches your Salesforce leads with critical company informaton like annual revenue, D-U-N-S number, and number of employees. You can check whether an individual lead was processed with this clean rule and the status of that processing. If you'd like to test the clean rule, you can manually clean the record using the clean rule. Remember: With clean rules, your records are automatically cleaned, so manually cleaning a record isn't necessary.

1. Open the lead that you're checking.
2. Review the clean status for the `Company Info for Leads` clean rule. In Salesforce Classic, you'll find this status in the Clean This Record with Data.com section. (If you can't find the Clean This Record section, ask your Salesforce admin to add it to your page layout.) In Lightning Experience, click the `Check Clean Status` quick action to view the clean rule statuses.
3. To manually clean the lead, click **Clean** for the `Company Info for Leads` clean rule.



Lead Detail

Lead Owner: Admin User [Change]
Lead Status: New
Name: Mr. Andy Smith
Phone: (555) 555-1212
Company: Universal Technologies
Email: info@salesforce.com
Title: Vice President
Rating:

▸ Address Information

▸ Additional Information

Custom Links

Google Search
Google News
Google Maps
Hoovers Profile
Send Gmail

Clean This Record with Data.com

Action	Clean Status	Clean Rule Name	Data Service	Last Cleaned
Clean	Not Compared	Data.com Companies for Leads Clean Rule	Data.com Companies for Leads	Never

If your lead matches a record in the data service, any blanks are filled in for the `Annual Revenue`, `Company D-U-N-S Number`, `D&B Company`, `Industry`, and `No. of Employees` fields. Existing values are not overwritten. The `Clean Status` for the clean rule is updated.

Note: If you change the `Address`, `Company D-U-N-S Number`, `Company`, or `Email` fields, the `Clean Status` for the `Data.com Company Info for Leads` clean rule is set to `Not Compared` until the record is cleaned again. Fortunately, with clean rules, the lead is automatically cleaned again as soon as the lead is saved!

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available with a Data.com Premium Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To clean leads:
- "Edit" on leads

Standard Data.com Clean Rules

Learn key details about the standard clean rules, which help you automatically add information to your Salesforce records. Find a description of how each clean rule works and the fields it updates.

EDITIONS

Available in: Salesforce Classic

Geocode clean rules available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Other clean rules available with a Data.com Premium Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Default Name	Data Service	Object	How Fields Are Updated	Matching Fields	Fields Updated
Account Geo Clean Rule for Billing Address	Data.com Geo	Account	Overwrite	`Billing Address`	• `BillingLatitude` • `BillingLongitude` • `BillingGeocodeAccuracy` Latitude, longitude, and accuracy are not visible on records.
Account Geo Clean Rule for Shipping Address	Data.com Geo	Account	Overwrite	`Shipping Address`	• `ShippingLatitude` • `ShippingLongitude` • `ShippingGeocodeAccuracy` Latitude, longitude, and accuracy are not visible on records.
Contact Geo Clean Rule for Mailing Address	Data.com Geo	Contact	Overwrite	`Mailing Address`	• `MailingLatitude` • `MailingLongitude` • `MailingGeocodeAccuracy` Latitude, longitude, and accuracy are not visible on records.
Lead Geo Clean Rule for Address	Data.com Geo	Lead	Overwrite	`Address`	• `Latitude` • `Longitude` • `GeocodeAccuracy` Latitude, longitude, and accuracy are not visible on records.

Default Name	Data Service	Object	How Fields Are Updated	Matching Fields	Fields Updated
Company Info for Leads (Beta)*	Data.com Companies for Leads	Lead	Auto-fill blanks	• `Company` • `Email` • `Address` • `Company D-U-N-S Number`	• `Annual Revenue` (US Dollars) • `Company D-U-N-S Number` • `D&B Company` • `No. of Employees` • `Industry`

* Only available with a Data.com Premium Clean license

SEE ALSO:

Set Up Clean Rules

What Are Clean Rules?

Guidelines for Determining How Well Clean Rules Are Working

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Geocode clean rules available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Other clean rules available with a Data.com Premium Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Do you want to know how well Data.com Clean is working for your organization? Check out the Clean Vitals page, which shows the match rate for your clean rules. You'll see the percentage of processed records that Data.com matched to a record in the data service. When a record's matched, it can be updated with the latest data.

- The `Errors` column shows the number of errors that occurred when processing records. An error occurs if a processed record can't be updated due to a trigger, workflow rule, duplicate rule, or validation rule. Click the number of errors to download a file that includes the ID of each record with an error and the associated error message. Only the most recent error for a record is available. The `Errors` column includes a maximum of 10,000 errors per clean rule.
- No data is displayed for clean rules that were activated in the last 24 hours.

Find Out How Many of Your Organization's Records Need Better Data

Data.com Data Assessments is a free Salesforce AppExchange package that tells you how many of your organization's records Data.com can enrich with more and better data. It can also tell you how many of your records have been marked as `Inactive` in Data.com, and if you request, how many records in your Salesforce organization appear to be duplicates.

Data.com Data Assessments also lists the fields on accounts, contacts, and leads, and tell you how many are blank within your records and how many have different values from Data.com's. (For example, you may have 10 account records in which the `Phone` field value is blank, or five contacts in which the `Account Name` field is blank.) You can use it to help you decide whether to purchase Data.com Clean, which updates fields with blanks or out-of-date values. If you already use Data.com Clean, it can help show you the value you're getting.

1. Install the Data.com Assessment app from the AppExchange.
2. From the Force.com app menu, select `Data.com Assessments` to open the Data Assessment app.
3. Click the Data.com Assessment tab and define your assessment preferences.
4. Click **Start My Assessment**.
   We tell you how long we expect the assessment to take. The completion calculation is based on 15 records per second, and we round up to the nearest hour. So if you have 200,000 accounts, for example, your assessment will take about 3 hours and 45 minutes to complete. We estimate it at 4 hours.
5. After the assessment is complete, from the Force.com app menu, select `Data.com Assessments`.
6. Click the Data.com Assessment tab, then click the Assessments tab.
7. Click **View Assessments** next to the assessment you want.
8. Click through the assessment tabs. Here's what you find.

Tab	What it Tells You
Summary	Breaks down the set of records we analyzed for the assessment. It tells you how many we can enrich with better data, how many records are likely to be inactive in Data.com and if you requested it when you ran the assessment, how many of your records are likely to be duplicates. We also tell you how many of your records were matched to Data.com records and how many were not.
Accounts	Breaks down the account records we matched, showing the number and percentage of records by status and identifying the match percentage. Data assessments also list Account fields and for a given field, tell you how many records have blank values for that field and how many have values that are different from Data.com's. (For example, you may have 10 account records in which the `Phone` field value is blank.)
Contacts	Breaks down the contact records we matched, showing the number and percentage of records by status and identifying the match percentage. Data assessments also list Contact fields and for a given field, tell you how many records have blank values for that field and

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To install packages:
- "Download AppExchange Packages"

To run a Data.com data assessment:
- No permissions required

To view a Data.com data assessment:
- No permissions required

Tab	What it Tells You
	how many have values that are different from Data.com's. (For example, you may have five contact records in which the `Account` field value is blank.)
Leads	Breaks down the lead records we matched, showing the number and percentage of records by status and identifying the match percentage. Data assessments also list Lead fields and for a given field, tell you how many records have blank values for that field and how many have values that are different from Data.com's. (For example, you may have 12 lead records in which the `Title` field value is different from Data.com's.)
Unmatched	Data.com's matching algorithm uses key fields to identify matching records. This tab lists those fields, and shows you the number and percentage of blank field values within your unmatched records. Adding valid data to these fields will most likely improve your organization's match results.
DUNSRight	Shows the expected account match rate using D&B DUNSRight Matching. The confidence code is a number from 1 to 10. A match confidence code of 10 is the most precise and the most exact match. You can set a confidence level threshold that identifies records as Matched or Select Match. Matched records are automatically added to your automated clean process. You can manually add Select Match records to your automated clean process.

IN THIS SECTION:

Install and Implement Data.com Reports AppExchange Packages
Get access to additional reports that help your users analyze account, contact, and lead data.

Data.com Reports and Dashboards
Want to analyze the impact of Data.com data on your business? Use the free Data.com reports packages from the AppExchange to easily analyze account, contact, and lead data.

Install and Implement Data.com Reports AppExchange Packages

Get access to additional reports that help your users analyze account, contact, and lead data.

USER PERMISSIONS

To install packages:
- "Download AppExchange Packages"

Available in: Salesforce Classic
Available with a Data.com Prospector license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions
Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

There are multiple Data.com report packages available on the AppExchange. The reports packages you install depend on what data you're interested in and which Data.com products you use. Here's a list of the different packages, as well as instructions on how to install them.

Available AppExchange Reports Package	Contents	Considerations
Data.com Prospector Reports	Dashboard and associated reports used primarily by sales management to see the value Data.com provides in terms of converted leads, sales forecast, and revenue.	To install this package, your organization must use Data.com Prospector.
Data.com Clean Reports	Dashboard and associated reports used primarily by sales operations and those responsible for keeping Salesforce data clean.	To install this package, your organization must use Data.com Clean.
Running Data.com Data Assessents	Dashboard and associated reports utilize the rich set of D&B Company data to give you and your users unparalleled insight into your accounts, to help improve sales planning and business strategy.	To install this package, your organization must use Data.com Premium Prospector or Data.com Premium Clean.
	Tells you how Data.com can enrich your data.	Your organization can request one assessment every 30 days.

1. Go to the Data.com reports package you want to download.
2. Click **Get it Now**.
3. Install the Data.com reports packages you want to use.
4. If your organization uses Professional Edition, add these fields to your page layouts. If you don't, these fields won't be included on your reports.

Page Layout	Fields
Account	`Sourced from Data.com`
Contact	`Sourced from Data.com`
Lead	`Sourced from Data.com`
Opportunity	`Sourced from Data.com`

5. Let your users know which Data.com reports and dashboards are available.

Data.com Reports and Dashboards

Want to analyze the impact of Data.com data on your business? Use the free Data.com reports packages from the AppExchange to easily analyze account, contact, and lead data.

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To run Data.com reports:
- "Run reports"

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

There are multiple Data.com reports packages available on the AppExchange. Each report package offers a dashboard and several preconfigured reports to help you analyze account, contact, and lead data.

Before you can use any of the reports or dashboards, your system administrator needs to install it. To see which reports are available to you, click the Reports tab. To run one of the reports, click the appropriate folder to expand the report list, then select the report you want.

Available AppExchange Reports Package	Contents
Data.com Prospector Reports	Dashboard and associated reports used primarily by sales management uses to see the value Data.com provides in terms of converted leads, sales forecast, and revenue.
Data.com Clean Reports	Dashboard and associated reports used primarily by sales operations and those responsible for keeping Salesforce data clean.
Data.com Premium Reports	Dashboard and associated reports utilize the rich set of D&B Company data to give you unparalleled insight into your accounts, which will help improve sales planning and business strategy.

Guidelines for Keeping Your Organization's Records Complete and Up-to-Date with Data.com Clean

Here are some tips and best practices for implementing, monitoring, and working with Data.com Clean.

- Understand how matching works.
- Use your sandbox environment to try out the automated clean jobs before running them in your production org with live data:

  After Data.com Clean is provisioned in your production org, refresh your sandbox so it has the same permissions and data. Then follow the steps in Implementing Data.com Clean to set up Clean in your sandbox. If everything runs smoothly in your sandbox environment, follow the same implementation steps in your production org.
- Check your match and update rates on the Clean Metrics & Analytics page. There, you'll find information about the total number of records cleaned, how many have been matched, and how many have been updated. Figures represent all processed records (whether cleaned manually, from a list, or from automated Clean jobs) and reflect your rates since your organization implemented Data.com Clean.
- Schedule regular backups of your account, contact, and lead data. It's always a good practice, and if your Salesforce records are ever matched inappropriately, you can revert to previous versions. Backups are most important if you clean records from lists or with automated Clean jobs, because those Clean methods allow you to auto-fill blank fields.
- Set up field history tracking for accounts, contacts, and leads. Field history tracking helps you identify changes to field values, and tracks who made changes and when. If you use field history tracking, make sure you add the Account History, Contact History, and Lead History related lists to those objects' respective page layouts.
- Install and use Data.com Reports.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement Data.com Clean:
- "Customize Application"

To back up data:
- "Data Export"

To set field history tracking:
- "Customize Application"

To set field-level security:
- "Customize Application"

Set Up Data.com Social Key

Let your reps get social profiles for their contacts and leads. To do so, just set up and implement Data.com Social Key.

Important: As of Spring '16, Data.com Social Key and the Data.com Social Profile Match API are no longer available. At that time, social profile handles, such as those from LinkedIn®, aren't added to records that are cleaned with Data.com. And, you can't use the Data.com Social Profile Match API to search for social profile handles.

If you haven't yet, enable Social Accounts, Contacts, and Leads and select the social networks you want to get social profiles from. After jobs have run, you can check out their Social Key job history on the Clean Jobs page in Setup.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement Social Key:
- "Customize Application"

IN THIS SECTION:

Enable Data.com Social Key

Before your organization can use Social Key to find and associate social handles for your contact and lead records, you must enable the feature.

Configure Data.com Clean Jobs for Social Key

Social Key provides social handles through Data.com Clean jobs. You need to make sure your Clean jobs are configured for Social Key.

Configure Data.com Clean List View Cleaning for Social Key

Social Key provides social handles when users clean contact or lead records from a list. You'll need to add a few fields to your organization's list views.

Enable Data.com Social Key

Before your organization can use Social Key to find and associate social handles for your contact and lead records, you must enable the feature.

Important: As of Spring '16, Data.com Social Key and the Data.com Social Profile Match API are no longer available. At that time, social profile handles, such as those from LinkedIn®, aren't added to records that are cleaned with Data.com. And, you can't use the Data.com Social Profile Match API to search for social profile handles.

1. From Setup, enter `Social Key Settings` in the `Quick Find` box, then select **Social Key Settings**.
2. Click **Enable Social Key**.

If you also need to enable and set up Social Accounts and Contacts, we'll let you know after you enable Social Key.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement Social Key:
- "Customize Application"

SEE ALSO:

Set Up Data.com Social Key

Configure Data.com Clean Jobs for Social Key

Social Key provides social handles through Data.com Clean jobs. You need to make sure your Clean jobs are configured for Social Key.

Important: As of Spring '16, Data.com Social Key and the Data.com Social Profile Match API are no longer available. At that time, social profile handles, such as those from LinkedIn®, aren't added to records that are cleaned with Data.com. And, you can't use the Data.com Social Profile Match API to search for social profile handles.

Social Key works with Social Accounts and Contacts and Data.com Clean to make it easier to follow your contacts and leads on social networks. From Social Accounts and Contacts, select the social networks you want. The Social Key process runs during your automated Clean jobs, so to use Social Key, you need to make sure Clean is enabled, and select and schedule the jobs you'll need.

When you enable Social Key, the next scheduled Clean job will run a full sync with Data.com for the objects you've enabled for clean jobs (contacts, leads, or both). Social Key will provide social handles at regular intervals after that, at the same time as your Clean jobs. For example, if you run your clean jobs once per week, on Wednesday, the Social Key job will do a full sync every other Wednesday.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement Social Key:
- "Customize Application"

Note: If a Clean job fails, the Social Key process fails, as well. To view Clean and Social Key job histories, from Setup, enter `Jobs` in the `Quick Find` box, then select **Jobs**.

If you need guidance on setting up Data.com Clean or verifying your preferences or settings, just click **Help for this Page** on any Clean setup page.

1. From Setup, enter `Clean Settings` in the `Quick Find` box, then select **Clean Settings**.
2. Confirm that Data.com Clean is enabled.
3. From Setup, enter `Preferences` in the `Quick Find` box, then select **Preferences** under Clean.
4. Confirm that Clean jobs are enabled for the objects for which you want to get social handles. We provide them for contacts and leads.
5. From Setup, enter `Jobs` in the `Quick Find` box, then select **Jobs**.
6. Confirm that Clean jobs are scheduled.

SEE ALSO:

Set Up Data.com Social Key

Configure Data.com Clean List View Cleaning for Social Key

Social Key provides social handles when users clean contact or lead records from a list. You'll need to add a few fields to your organization's list views.

Important: As of Spring '16, Data.com Social Key and the Data.com Social Profile Match API are no longer available. At that time, social profile handles, such as those from LinkedIn®, aren't added to records that are cleaned with Data.com. And, you can't use the Data.com Social Profile Match API to search for social profile handles.

Social Key works with Social Accounts and Contacts and Data.com Clean to make it easier to follow your contacts and leads on social networks. From Social Accounts and Contacts, select the social networks you want. The Social Key process runs when users clean records from a list.

1. Click the tab for the object whose records you want to clean from a list: Contacts or Leads.
2. Select a view from the drop-down and click **Edit**.
3. Make sure the `Clean Status` field has been added to the Selected Fields.
   Adding this field automatically adds the **Clean** button to the list view.
4. Optionally, add the fields for the social networks you've enabled (LinkedIn, Twitter, or Facebook) to your contact list views.

   The social network fields aren't available on the lead list views.

SEE ALSO:

Set Up Data.com Social Key

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement Social Key
- "Customize Application"

To create custom list views:
- "Read" on the type of record included in the list

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

Learn About Data.com Products for Administrators

Guidelines for Using D&B Company Records

Review some guidelines so your organization gets the most out of D&B Company records, which contain over 100 fields of industry, financial, and competitive information from Dun & Bradstreet®.

- If your organization has Data.com Premium Prospector or Data.com Premium Clean, you have access to the DandBCompany object, which provides Dun & Bradstreet data for accounts and leads you add to Salesforce.
- Make sure you add the D&B Companies tab to user profiles. That's how they'll access a list of all D&B Company records. The D&B Companies tab lists all the D&B Company records you have in Salesforce.
- To let your users delete D&B Company records, you need to create a permission set with the *Delete D&B Company records* and *Read D&B Company records* permissions and assign that permission set to users. You may also need to add the **Delete** button to page layouts.
- If your company also uses Data.com Premium Clean, you can use automated jobs to update your D&B Company records.
- Add the **Refresh** button to your D&B Company page layouts, so you can manually update D&B Company records to get the latest data from Dun & Bradstreet. You can also use automated jobs to update D&B Company records.
- D&B Company records linked to account records are not cleaned along with linked account records.
- For accounts or leads not added from Data.com (those created manually, for example), if a corresponding D&B Company record exists, it is added to Salesforce and linked to the account or lead record the first time that record is cleaned.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To implement D&B Companies:
- "Customize Application"

SEE ALSO:

Configure Page Layouts for Data.com Prospector and Data.com Clean

D&B Company Fields

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

If you add or update an account or lead with Data.com Premium Prospector or Data.com Premium Clean, a D&B Company record is automatically created and linked to that account or lead via the `D&B Company` field. Just click the link in the `D&B Company` field to access the associated D&B Company record, which has over 100 fields of industry, financial, and competitive information from Dun & Bradstreet®. This gives your organization integrated access to Dun & Bradstreet's trusted global database of company information directly in Salesforce.

Example: If you add an account record for Starbucks from Data.com, when you open its record, the `D&B Company` field value is `Starbucks Corporation`. The value is underlined to identify it as a link. Just click the link to open the Starbucks Corporation D&B Company record.

Example: If you update an account record for Google using Data.com Premium Clean—either manually or with jobs—when you open its record, the `D&B Company` field value is `Google`. The value is underlined to identify it as a link. Just click the link to open the Google D&B Company record.

Note: Some D&B field labels are different from the object field labels they are mapped to. For example, the `Account Site` field on account records maps to the `Location Type` field on the linked D&B Company record. For a list of default mappings, see Default Data.com-to-Salesforce Field Mappings. on page 15

Field	Description
`Annual Sales Volume`	The total annual sales revenue in the headquarters' local currency. Dun & Bradstreet tracks revenue data for publicly traded companies, Global Ultimates, Domestic Ultimates, and some headquarters. Dun & Bradstreet does not supply this data for branch locations.
`Annual Sales Volume Indicator`	The reliability of the Annual Sales Volume figure. Available values are *`Actual number`*, *`Low`*, *`Estimated (for all records)`*, *`Modeled (for non-US records)`*. A blank value indicates this data is unavailable.
`Company Description`	A brief description of the company, which may include information about its history, its products and services, and its influence on a particular industry. This data is supplied by Hoover's.
`Delinquency Risk`	The probability that a company will pay with a significant delay compared to the agreed terms. The risk level is based on the standard Commercial Credit Score, and ranges from low risk to high risk. Also known as marketing prescreen. Available values are *`High risk of delinquency`*, *`Low risk of delinquency`*, and *`Moderate risk of delinquency`*. Dun & Bradstreet supplies this data for US and Canadian organizations only. Important: Use this information for marketing pre-screening purposes only.

Field	Description
`Domestic Ultimate Business Name`	The primary name of the Domestic Ultimate, which is the highest ranking subsidiary, specified by country, within an organization's corporate structure.
`Domestic Ultimate D-U-N-S Number`	The D-U-N-S Number for the Domestic Ultimate, which is the highest ranking subsidiary, specified by country, within an organization's corporate structure.
`D-U-N-S Number`	The Data Universal Numbering System (D-U-N-S) number is a unique, nine-digit number assigned to every business location in the Dun & Bradstreet database that has a unique, separate, and distinct operation. D-U-N-S numbers are used by industries and organizations around the world as a global standard for business identification and tracking.
`Facsimile Number`	The company's facsimile number.
`Fifth NAICS Code`	An additional NAICS code used to further classify an organization by industry. See Primary NAICS Code.
`Fifth NAICS Description`	A brief description of an organization's line of business, based on the corresponding NAICS code. See Primary NAICS Description.
`Fifth SIC8 Code`*	An additional SIC code used to further classify an organization by industry. Maximum size is 8 characters.
`Fifth SIC8 Description`	A brief description of an organization's line of business, based on the corresponding SIC code. Maximum size is 80 characters.
`Fifth SIC Code`	An additional SIC code used to further classify an organization by industry. See Primary SIC Code.
`Fifth SIC Description`	A brief description of an organization's line of business, based on the corresponding SIC code. See Primary SIC Description.
`Fifth Tradestyle`	An additional tradestyle used by the organization. See Primary Tradestyle.
`FIPS MSA Code`	The Federal Information Processing Standards (FIPS) and the Metropolitan Statistical Area (MSA) codes identify the organization's location. The MSA codes are defined by the US Office of Management and Budget. Dun & Bradstreet supplies this data for US organizations only.
`FIPS MSA Code Description`	A brief description of an organization's FIPS MSA code. Dun & Bradstreet supplies this data for US organizations only.
`Fourth NAICS Code`	An additional NAICS code used to further classify an organization by industry. See Primary NAICS Code.
`Fourth NAICS Description`	A brief description of an organization's line of business, based on the corresponding NAICS code. See Primary NAICS Description.

Field	Description
`Fourth SIC8 Code`*	An additional SIC code used to further classify an organization by industry. Maximum size is 8 characters.
`Fourth SIC8 Description`	A brief description of an organization's line of business, based on the corresponding SIC code. Maximum size is 80 characters.
`Fourth SIC Code`	An additional SIC code used to further classify an organization by industry. See Primary SIC Code.
`Fourth SIC Description`	A brief description of an organization's line of business, based on the corresponding SIC code. See Primary SIC Description.
`Fourth Tradestyle`	An additional tradestyle used by the organization. See Primary Tradestyle.
`Fortune 1000 Rank`	The numeric value of the company's Fortune 1000 ranking. A null or blank value means that the company isn't ranked as a Fortune 1000 company.
`Geocode Accuracy`	The level of accuracy of a location's geographical coordinates compared with its physical address. Available values include *`Rooftop level`*, *`Street level`*, *`Block level`*, *`Census tract level`*, *`Mailing address level`*, *`ZIP code level`*, *`Geocode could not be assigned`*, *`Places the address in the correct city`*, *`Not matched`*, *`Not matched`*, *`Street intersection`*, *`PO BOX location`*, and *`Non-US rooftop accuracy`*.
`Global Ultimate Business Name`	The primary name of the Global Ultimate, which is the highest entity within an organization's corporate structure and may oversee branches and subsidiaries.
`Global Ultimate D-U-N-S Number`	The D-U-N-S Number of the Global Ultimate, which is the highest entity within an organization's corporate structure and may oversee branches and subsidiaries.
`Import/Export`	Identifies whether a business imports goods or services, exports goods or services, and/or is an agent for goods.
`International Dialing Code`	The required code for international calls.
`Latitude`	The geographical coordinates that specify the north-south position of a point on the Earth's surface. Used with longitude to specify a precise location, which is then used to assess the Geocode Accuracy.
`Legal Structure`	Identifies the legal structure of an organization. Available values include *`Cooperative`*, *`Nonprofit organization`*, *`Local government body`*, *`Partnership of unknown type`*, and *`Foreign company`*.

Field	Description
`Local Currency Code`	The currency in which the company's sales volume is expressed. The full list of values can be found at the Optimizer Resources page maintained by Dun & Bradstreet.
`Local Currency ISO Code`	The code used to represent a company's local currency. This data is provided by the International Organization for Standardization (ISO) and is based on their three-letter currency codes. For example, USD is the ISO code for United States Dollar.
`Location Ownership Indicator`	Indicates whether a company owns or rents the building it occupies.
`Location Type`	Identifies the organizational status of a company. Available values are *`Single location`*, *`Headquarters/Parent`*, and *`Branch`*.
`Longitude`	The geographical coordinates that specify the east-west position of a point on the Earth's surface. Used with latitude to specify a precise location, which is then used to assess the company's Geocode Accuracy.
`Mailing Address`	The address where a company has its mail delivered. If the mailing address is the same as the primary address, this field will be blank.
`Marketing Segmentation Cluster`	Twenty-two distinct, mutually exclusive profiles, created as a result of cluster analysis of Dun & Bradstreet data for US organizations. Available values include *`High-Tension Branches of Insurance/Utility Industries`*, *`Rapid-Growth Large Businesses`*, *`Labor-Intensive Giants`*, *`Spartans`*, *`Main Street USA`*. Dun & Bradstreet supplies this data for US organizations only.
`Minority-Owned Indicator`	Indicates whether an organization is owned or controlled by a member of a minority group. Dun & Bradstreet supplies this data for US organizations only.
`National Identification Number`	The identification number used in some countries for business registration and tax collection. This field does not apply to US organizations.
`National Identification System`	Identifies the type of national identification number used. The full list of values can be found at the Optimizer Resources page maintained by Dun & Bradstreet.
`Number of Business Family Members`	The total number of family members, worldwide, within an organization, including the Global Ultimate, its subsidiaries (if any), and its branches (if any).
`Number of Employees—Global`	The total number of employees at the Global Ultimate, which is the highest entity within an organization's corporate structure and may oversee branches and subsidiaries.

Field	Description
`Number of Employees—Location`	The number of employees at a specified location, such as a branch location.
`Number of Employees—Location Indicator`	The reliability of the Number of Employees—Location figure. Available values are *`Actual number`*, *`Low`*, *`Estimated (for all records)`*, *`Modeled (for non-US records)`*. A blank value indicates this data is unavailable.
`Number of Employees—Total`	The total number of employees in the company, including all subsidiary and branch locations. This data is only available on records that have a value of *`Headquarter/Parent`* in the `Location Type` field.
`Number of Employees—Total Indicator`	The reliability of the Number of Employees–Total figure. Available values are *`Actual number`*, *`Low`*, *`Estimated (for all records)`*, *`Modeled (for non-US records)`*. A blank value indicates this data is unavailable.
`Out of Business Indicator`	Indicates whether the company at the specified address has discontinued operations.
`Ownership Type Indicator`	Indicates whether ownership of the company is public or private. The subsidiaries of a publicly traded parent company will show a value of *`Private`* unless the subsidiaries are independently traded.
`Parent Company Business Name`	The primary name of the parent or headquarters company.
`Parent Company D-U-N-S Number`	The D-U-N-S Number for the parent or headquarters.
`Primary Address`	The address where a company is physically located. This field is `Billing Address` on account records.
`Primary Business Name`	The primary or registered name of a company.
`Primary NAICS Code`	The six-digit North American Industry Classification System (NAICS) code is the standard used by business and government to classify business establishments according to their economic activity for the purpose of collecting, analyzing, and publishing statistical data related to the US business economy. The full list of values can be found at the Optimizer Resources page maintained by Dun & Bradstreet.
`Primary NAICS Description`	A brief description of an organization's line of business, based on its NAICS code.
`Primary SIC Code`	The four-digit Standard Industrial Classification (SIC) code is used to categorize business establishments by industry. The full list of values can be found at the Optimizer Resources page maintained by Dun & Bradstreet.
`Primary SIC Description`	A brief description of an organization's line of business, based on its SIC code.

Field	Description
`Primary Tradestyle`	A name, different from its legal name, that an organization may use for conducting business. Similar to "Doing business as" or "DBA".
`Prior Year Employees`	The total number of employees for the prior year.
`Prior Year Revenue`	The annual revenue for the prior year.
`Second SIC8 Code`*	An additional SIC code used to further classify an organization by industry. Maximum size is 8 characters.
`Second SIC8 Code Description`	A brief description of an organization's line of business, based on the corresponding SIC code. Maximum size is 80 characters.
`Second NAICS Code`	An additional NAICS code used to further classify an organization by industry. See Primary NAICS Code.
`Second NAICS Description`	A brief description of an organization's line of business, based on the corresponding NAICS code. See Primary NAICS Description.
`Second SIC Code`	An additional SIC code used to further classify an organization by industry. See Primary SIC Code.
`Second SIC Description`	A brief description of an organization's line of business, based on the corresponding SIC code. See Primary SIC Description.
`Second Tradestyle`	An additional tradestyle used by the organization. See Primary Tradestyle.
`Sixth NAICS Code`	An additional NAICS code used to further classify an organization by industry. See Primary NAICS Code.
`Sixth NAICS Description`	A brief description of an organization's line of business, based on the corresponding NAICS code. See Primary NAICS Description.
`Sixth SIC8 Code`*	An additional SIC code used to further classify an organization by industry. Maximum size is 8 characters.
`Sixth SIC8 Description`	A brief description of an organization's line of business, based on the corresponding SIC code. Maximum size is 80 characters.
`Sixth SIC Code`	An additional SIC code used to further classify an organization by industry. See Primary SIC Code.
`Sixth SIC Description`	A brief description of an organization's line of business, based on the corresponding SIC code. See Primary SIC Description.
`Small Business Indicator`	Indicates whether the company is designated a small business as defined by the Small Business Administration of the US government. Dun & Bradstreet supplies this data for US organizations only.
`Stock Exchange`	The corresponding exchange for a company's ticker symbol. For example: NASDAQ or NYSE.

Field	Description
`Subsidiary Indicator`	Indicates whether a company is more than 50 percent owned by another organization.
`S&P 500`	A true or false value. If `true`, the company is listed in the S&P 500 Index. If `false`, the company isn't listed in the S&P 500 Index.
`Telephone Number`	A company's primary telephone number.
`Third NAICS Code`	An additional NAICS code used to further classify an organization by industry. See Primary NAICS Code.
`Third NAICS Description`	A brief description of an organization's line of business, based on the corresponding NAICS code. See Primary NAICS Description.
`Third SIC8 Code`*	An additional SIC code used to further classify an organization by industry. Maximum size is 8 characters.
`Third SIC8 Description`	A brief description of an organization's line of business, based on the corresponding SIC code. Maximum size is 80 characters.
`Third SIC Code`	An additional SIC code used to further classify an organization by industry. See Primary SIC Code.
`Third SIC Description`	A brief description of an organization's line of business, based on the corresponding SIC code. See Primary SIC Description.
`Third Tradestyle`	An additional tradestyle used by the organization. See Primary Tradestyle.
`Ticker Symbol`	The abbreviation used to identify publicly traded shares of a particular stock. Also known as the stock symbol.
`URL`	An organization's primary website address.
`US Tax ID Number`	The identification number for the company used by the Internal Revenue Service (IRS) in the administration of tax laws. Also referred to as Federal Taxpayer Identification Number. Dun & Bradstreet supplies this data for US organizations only.
`Woman-Owned Indicator`	Indicates whether a company is more than 50 percent owned or controlled by a woman. Dun & Bradstreet supplies this data for US organizations only.
`Year Started`	The year the company was established or the year when current ownership or management assumed control of the company. If the company establishment or ownership year is unavailable, then the year the Dun & Bradstreet record was created will be used. Dun & Bradstreet does not supply this data for branch locations.

*Available with Data.com Premium Prospector license only.

Resolve Data.com Record Addition Errors

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To add accounts from Data.com:
- "Create" on accounts

To add contacts from Data.com:
- "Create" on contacts

To add Data.com contacts from an account
- "Read" on accounts AND "Create" on contacts

To add Data.com contacts as leads
- "Create" on leads

If errors prevent you from adding one or more Data.com records to Salesforce, we'll provide a .csv error log file to help you fix any record addition errors.

How we provide the error log depends on what you were trying to do. If you were trying to add:

- Fewer than 200 records, you'll see a message with a link to the error log on the Files tab.
- Two hundred records or more, you'll receive an email with a link to the error log on the Files tab.
- Any number of records and you *do not* have Chatter enabled, you'll receive an email with the error log attached.

1. Open the record addition error log and review the errors, then take one of these actions.
    - If you see errors regarding duplicate records, you don't need to do anything. *Duplicate* errors mean that the records are already in Salesforce, so you don't need to add them again. If your Data.com preferences are set to allow duplicates, the error log will not include any *duplicate* errors. If your Data.com preferences are set to allow duplicates but your organization also uses duplicate rules to prevent the creation of duplicate records, the duplicate rule will determine if the duplicate record is allowed or blocked. Records that are blocked by the duplicate rule will appear in the error log.
    - If you see errors regarding your organization's custom configurations, such as triggers, validation rules, or workflow, let your administrator know because they may need to correct these configurations.
    - If your organization uses state and country picklists and you see errors regarding available states or countries, notify your administrator, who will need to add the particular state or country to the picklist.
    - For all other errors, contact your administrator, who may need to contact Salesforce Customer Support.
2. After your administrator resolves the errors, try again to add the Data.com records to Salesforce.

How Are Salesforce and Data.com Records Matched?

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

If you clean your Salesforce account, contact, and lead data with Data.com, it's important to understand how your Salesforce records are compared and matched with records from Data.com.

Tip: For complete details about how the Data.com matching service works, including a graphic overview and extensive examples, please see our white paper, Data.com Record Matching in Salesforce.

Watch a Demo: Understanding Matching Rules

Salesforce and Data.com records can be compared and matched in two ways.

- Manually, when a user clicks **Clean** on an individual account, contact, or lead record.
- Via Clean jobs, which automatically attempt to match all your account, contact, or lead records.

Automated clean jobs are only available to organizations that purchase Data.com Clean. *Manual* clean is available to all licensed Data.com Prospector users.

The first time a Salesforce record is cleaned—either manually or via automated job—the matching service searches Data.com for similar records. It examines the field values in each record and looks for enough identical or similar information to indicate that the two records represent the same entity (that is—the same account, contact, or lead). If Data.com finds a match, the two records are linked by a numeric value in the `Data.com Key` field. For contact and lead records, every time the Salesforce record is cleaned, the matching service is used to match the record. For account records, every time the Salesforce record is cleaned, the `D-U-N-S Number` field is used to match (or look up) the record. If the `D-U-N-S Number` field is blank, the matching service will be used to find a match. If the Salesforce record changes substantially, the next time it is cleaned, the matching service may look for a better match from other Data.com records.

Note:

- If you prefer to rematch account records with the matching service, regardless of whether a D-U-N-S Number is present, please contact Salesforce Customer Support. Doing so, however, may cause some account records to have the Data.com Clean `Not Found` status.
- If you've remapped or skipped mapping for the `D-U-N-S Number` field, or if you're organization purchased Data.com prior to December 16, 2011, the matching service will automatically be used to rematch account records.

For contacts and leads, the important fields are:

- `Name`
- `Email`

  Ideally, use a direct email address rather than a group address like info@org.com. (Identical Email values will almost always trigger a match unless other values in the record conflict.) **Note:** Data.com does not store emails that may be personal contact information, such as those from Gmail or Yahoo.

- `Account Name` for contacts; `Company` for leads.
- `Title`
- `Phone`

For accounts, the important fields are:

- `Account Name`
  - Make sure the account name doesn't contain any unrelated artifacts, such as numbers (1002), special characters (!#@#), or unrelated words. (These symbols are acceptable if they are part of the company's name.)
  - Try to avoid country and state names as values unless they are part of the company's name.
  - If the account name contains more than one word, like *`DSGI Business (PC World Business)`* try both of them.
  - If an account name is also a Website (like *`salesforce.com`*), try leaving off the subdomain (*`.com`* and the like).
- `Billing Address`
  - Use a full address, if possible.
  - Try to specify a value for the `Country` field. This will optimize your match rates.
  - Try to specify a value for the `State` or `ZIP code` field.
  - If you know the account's street name but not its street number, use the street name only. A street name without a street number is better than no value.
- `Website`
- `Phone`

How Are API Limits Defined for Data.com?

Data.com call limits are calculated based on the number and type of Data.com licenses you purchased. The listed information is read only. Use this information to track Data.com API call usage.

Call quotas are enforced at the Salesforce organization level.

Limit	Definition
Total Match Calls	Total number of API calls available in a 24 hour rolling call limit period
Remaining Number of Match Calls	The number of API calls still available for use by this API for the 24 hour rolling call limit period
Total Search Calls	Total number of API calls available in a 24 hour rolling call limit period
Remaining Number of Search Calls	The number of API calls still available for use by this API for the 24 hour rolling call limit period.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Here is how to calculate your quota: `1000 x (number of licenses)=(API call quota).`

The call quota for the Match API is based on the number of Data.com Clean licenses you have. The call quota for the Search API is base on the number of Data.com Prospecting licenses you have.

Enable or Disable Data.com API Functionality

Data.com API functionality is enabled by default. You can disable or enable Data.com API functionality by selecting or deselecting the Enable Data.com API checkbox.

To disable the Data.com APIs follow these steps.

1. From Setup, enter *`Data.com Administration`* in the `Quick Find` box, then select **API Preferences**.
2. To disable access, deselect the **Allow Data.com API Access** checkbox.
3. To apply and save your changes, **Click Save.**

To enable the Data.com APIs follow these steps.

1. From Setup, enter *`Data.com Administration`* in the `Quick Find` box, then select **API Preferences**.
2. To enable access, select the **Allow Data.com API Access** checkbox.
3. Select **“I have read and agreed to the aforementioned terms.”** checkbox and click **Confirm**.

   Legal Notice:

   Data.com API enables you to customize, build and integrate Data.com Prospecting and Clean functionalities, as the case may be, into your own business processes and workflows. Now that administrators have broader flexibility and discretion on how to process and clean Customer Data as part of these functionalities, it is important to remind you that as noted in your applicable master subscription agreement documentation covering the Data.com Prospecting and Clean functionality, and as further described in the Data.com Security, Privacy and Architecture Documentation accessible via help.salesforce.com, the Customer Data fields which you elect to process and/or clean may be transferred to the Data.com infrastructure for purposes of interoperation. If this broader flexibility poses any additional privacy or data security concerns for your organization, we encourage you to limit the types of Customer Data fields which you elect to process and clean, or instead opt-out of accessing the Data.com API by unselecting the 'Allow API Access' checkbox.

4. Click **Save** to enable Data.com API access.

Administering Data.com FAQ

Check out answers to some frequently asked questions about Data.com for administrators.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

IN THIS SECTION:

How do I know which Data.com product my organization has?

You can find out by going to the Data.com Licenses & Limits page. From Setup, enter *`Licenses & Limits`* in the `Quick Find` box, then select **Licenses & Limits**. If your organization has purchased Data.com Corporate Prospector, you'll see "Corporate" in the heading for this section of the page. If your organization has purchased Data.com Premium Prospector, you'll see "Premium" in the heading.

What Salesforce Fields Are Affected by Data.com Clean?

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Note:

- These fields may be different if your organization uses customized Data.com-to-Salesforce field mappings.
- If you can't edit one or more fields on an account, contact, or lead record, you may receive a message that says, `You have limited access to data, so you can not completely clean this record` or `You have limited access to account fields, so you can not update all the fields shown here`. If this happens, ask your administrator for help.

When you use Data.com Clean to clean a Salesforce record, either manually or with automated jobs, the record's fields are updated with Data.com data. Here's a list of the fields that are updated.

Account Fields

`Account Name`	`Industry`
`Account Site`	`NAICS Code`
`Annual Revenue`	`NAICS Description`

`Billing Address`	`Ownership`
`Clean Status`	`Phone`
`D&B Company` (Premium Prospector and Clean only)	`SIC Code`
`Data.com Key`	`SIC Description`
`D-U-N-S Number`	`Ticker Symbol`
`Description`	`Tradestyle`
`Employees`	`Website`
`Fax`	`Year Started`

Contact Fields

`Clean Status`	`Mailing Address`
`Data.com Key`	`Phone`
`Email`	`Title`
`Name`	

Lead Fields

`Address`	`Email`
`Annual Revenue`	`Industry`
`Clean Status`	`Name`
`Company`	`No. of Employees`
`Company D-U-N-S Number`	`Phone`
`D&B Company` (Premium Prospector and Clean only)	`Title`
`Data.com Key`	

What product should my organization use to clean our account, contact, and lead records?

You have a number of options. For complete details on the Data.com product suite and to learn about the clean options each one provides, check out Get High Quality Data When You Need It Right In Salesforce.

Contact Salesforce support if you need assistance getting Clean for your organization.

What should I do if my Data.com Users reach their addition limits and we need more prospecting capacity?

If you need to purchase additional licenses for Data.com Users, contact your Salesforce account executive.

SEE ALSO:

How Do Data.com User Types, Licenses, and Record Addition Limits Work?

Can I prevent Data.com Clean jobs from automatically updating records?

You sure can. Just follow these guidelines.

SEE ALSO:

Prevent Data.com Clean Jobs from Updating Records

Why did I receive a message that says, `You have limited access to data, so you can't completely clean this record`?

If you can't edit one or more fields on an account, contact, or lead record, you'll see this message when you use Data.com Clean to manually clean the record. You'll still be able to clean the fields that you can edit.

Ask your administrator to make sure you can edit the Salesforce fields affected when cleaning records, including D&B fields. How your administrator does this depends on which edition of Salesforce your company uses.

- For Contact Manager, Group, and Professional editions, make sure the fields are on the appropriate page layout.
- For Enterprise, Performance, and Unlimited editions, make sure field-level security is set to `Visible` for the fields.

How Often Are *All* My Accounts, Contacts, Leads, and D&B Companies Updated with Data.com Clean Jobs?

You choose when you want jobs to run using the Clean Jobs page. There are two types of jobs.

Full Sync Job

All records are cleaned, regardless of their clean status.

Note: If your jobs are set to bypass skipped records, records with a `Skipped` clean status are not cleaned.

Incremental Sync Job

Only records with a `Not Compared` clean status are cleaned.

For a full sync job to run, you must have jobs scheduled for at least one day of the week.

For contacts and leads, a full sync job runs every 14 days for all eligible records.

For D&B Company records, a full sync job runs every 14 days. D&B Company records are cleaned using only a full sync job.

For accounts, how often a full sync job runs depends on the matching service you select and whether accounts have a value for the `Company D-U-N-S Number` field. For accounts *with* a D-U-N-S number, a full sync job runs every 14 days, regardless of the matching service. For accounts *without* a D-U-N-S number, check out this table.

Matching Service	How often can a full sync job clean accounts *without* a D-U-N-S number?
Data.com matching	Every 14 days
DUNSRight matching	Every 30 days Note: You must set the `Full Sync With Next Job` option on the Clean Jobs page to `On` each time you want to run a full sync job for accounts without a D-U-N-S number. After a full sync job runs, this option changes to `Off`, and it can't be toggled to `On` for 30 days from the time the last full sync job finished.

SEE ALSO:

Schedule Data.com Clean Jobs

Schedule a Full Sync of Your Salesforce Account Records with Data.com Clean

Leverage Account, Contact, and Lead Clean Information

What's the Account Clean Info Object?

Account Clean Info is a background object that stores the metadata used to determine an account record's clean status.

Account Clean Info provides a snapshot of the data in your Salesforce account record and its matched Data.com record at the time the Salesforce record was cleaned.

Account Clean Info includes a number of bit vector fields, whose component fields each correspond to individual object fields and provide related data or status information about those fields. For example, the bit vector field `IsDifferent` has an `IsDifferentState` field. If the `IsDifferentState` field's value is `False`, that means the `State` field value is *the same* on the Salesforce account record and its matched Data.com record.

These are the bit vector fields.

- `CleanedBy` indicates who (a user) or what (a Clean job) cleaned the account record.
- `IsDifferent` indicates whether or not a field on the account record has a value that differs from the corresponding field on the matched Data.com record.
- `IsFlaggedWrong` indicates whether or not a field on the account record has a value that is flagged as wrong to Data.com.
- `IsReviewed` indicates whether or not a field on the account record is in a `Reviewed` state, which means that the value was reviewed but not accepted.

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Administrators can modify a limited set of Account Clean Info fields from the Account Clean Info page.

Developers can create triggers that read the Account Clean Info fields to help automate the cleaning or related processing of account records. For example, you might create a trigger that reads the `Clean Status` field on the Account object. If an account record's

`Clean Status` field value is `Different` but the record has no `Billing Street` value, the trigger could update the record's status to `Not Compared`.

SEE ALSO:

https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_objects_accountcleaninfo.htm

What's the Contact Clean Info Object?

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Contact Clean Info is a background object that stores the metadata used to determine a contact record's clean status.

Contact Clean Info provides a snapshot of the data in your Salesforce contact record and its matched Data.com record at the time the Salesforce record was cleaned.

Contact Clean Info includes a number of bit vector fields, whose component fields each correspond to individual object fields and provide related data or status information about those fields. For example, the bit vector field `IsDifferent` has an `IsDifferentEmail` field. If the `IsDifferentEmail` field's value is `False`, that means the `Email` field value is *the same* on the Salesforce contact record and its matched Data.com record.

These are the bit vector fields.

- `CleanedBy` indicates who (a user) or what (a Clean job) cleaned the contact record.
- `IsDifferent` indicates whether or not a field on the contact record has a value that differs from the corresponding field on the matched Data.com record.
- `IsFlaggedWrong` indicates whether or not a field on the contact record has a value that is flagged as wrong to Data.com.
- `IsReviewed` indicates whether or not a field on the contact record is in a `Reviewed` state, which means that the value was reviewed but not accepted.

Developers can create triggers that read the Contact Clean Info fields to help automate the cleaning or related processing of contact records.

SEE ALSO:

https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_objects_contactcleaninfo.htm

What's the Lead Clean Info Object?

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Lead Clean Info is a background object that stores the metadata used to determine a lead record's clean status.

Lead Clean Info provides a snapshot of the data in your Salesforce lead record and its matched Data.com record at the time the Salesforce record was cleaned.

Lead Clean Info includes a number of bit vector fields, whose component fields each correspond to individual object fields and provide related data or status information about those fields. For example, the bit vector field `IsDifferent` has an `IsDifferentTitle` field. If the `IsDifferentTitle` field's value is `False`, that means the `Title` field value is *the same* on the Salesforce lead record and its matched Data.com record.

These are the bit vector fields.

- `CleanedBy` indicates who (a user) or what (a Clean job) cleaned the lead record.
- `IsDifferent` indicates whether or not a field on the lead record has a value that differs from the corresponding field on the matched Data.com record.
- `IsFlaggedWrong` indicates whether or not a field on the lead record has a value that is flagged as wrong to Data.com.
- `IsReviewed` indicates whether or not a field on the lead record is in a `Reviewed` state, which means that the value was reviewed but not accepted..

Developers can create triggers that read the Lead Clean Info fields to help automate the cleaning or related processing of lead records.

SEE ALSO:

https://developer.salesforce.com/docs/atlas.en-us.api.meta/api/sforce_api_objects_leadcleaninfo.htm

Create a Custom Report Type for Account, Contact, or Lead Clean Info

Create custom report types to report on clean information for accounts, contacts, and leads. Clean Info custom report types can help you easily see clean information for multiple records in one report. Use that information to identify patterns and trends in your data and to manage or modify how your records are cleaned.

1. From Setup, enter `Report Types` in the `Quick Find` box, then select **Report Types**.
2. Click **New Custom Report Type**.
3. For Primary Object, select `Accounts`, `Contacts`, or `Leads`—whatever object you want to report on—and define the other required fields.
4. For Category, select either `Accounts & Contacts` or `Leads`, as appropriate.
5. Click **Next**.
6. Relate the companion Clean Info object (Account Clean Info, Contact Clean Info, or Lead Clean Info) to the primary object you selected. Accept the default for `A to B Relationship`.
7. Select a deployment status.
8. Click **Save**.

Now you can create custom reports based on your new custom report types.

SEE ALSO:

Report on Salesforce Records with a Specific Data.com Clean Status

EDITIONS

Available in: Salesforce Classic

Available with a Data.com Prospector license in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To create or update custom report types:
- "Manage Custom Report Types"

To delete custom report types:
- "Modify All Data"

Letting Users Share Information with Partners

Partner Portals Overview

You can create partner portals to help you better manage your partners.

The following table briefly describes the partner portal:

	Partner Portal
Purpose	Provides your business partners access to Salesforce data that you have made available to them
User Interface	Includes a highly customizable user interface using a point-and-click editor, and functionality similar to Salesforce, such as: permissions, custom objects, sharing rules, and Web tabs
Supported Record Types	Accounts, contacts, documents, ideas, leads, opportunities, solutions, and custom objects
Quantity	Contact Salesforce for more information
Administrator Controls	Administrators can: • Generate partner portal usernames and passwords • Manage the information of partner portal users

	Partner Portal
	- Manage partner portal users using permissions, roles, and sharing rules
User Controls	Partner users can update their own user information

SEE ALSO:

Enable the Partner Portal

Setting Up Your Partner Portal

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up a partner portal:
- "Customize Application"

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

To set up your partner portal:

1. Create one or more portals.

   For each portal:

   a. Configure the settings and communication templates.

      The Convert Portal User Access wizard automatically displays after the first time you save settings for your first portal, whether it is the Customer Portal or partner portal. You can use this wizard to help ensure that records and folders owned by Salesforce users are not shared with portal users.

   b. Customize the fonts and colors.

   c. Customize the available tabs and tab order.

   d. Configure portal languages.

2. Optionally, enable Salesforce CRM Content, Salesforce Knowledge, Entitlement Management, Ideas, or Answers as needed.
3. Create partner profiles.

   For each partner profile:

   a. Customize page layouts.

   b. Customize list views.

      Partner portal users can automatically see any list view with visibility settings marked `This view is accessible by all users`. We recommend that you create specific list views on all objects accessible to portal users, and then assign portal users to only the list views you want them to view.

   c. Customize search layouts.

      The search layouts in your Salesforce organization are the same search layouts used in your partner portal. Verify that search layouts on objects accessible to portal users only include fields you want them to view in search results.

4. Assign partner profiles to partner portals.

5. Optionally, enable single sign-on.
6. Enable login on each partner portal.
7. Create partner users.

SEE ALSO:

Enable the Partner Portal

Creating Partner Portals

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create partner portals:
- "Customize Application"

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

After you have enabled the Salesforce partner portal, you can create partner portals to satisfy the various business needs of your customers.

Note: You can create a maximum of 5 partner portals in your organization. Increases to that number are subject to product manager approval and require detailed use cases.

To create a partner portal:

1. From Setup, enter *`Partners`* in the `Quick Find` box, then select **Settings**.
2. Click **New**.
3. Set the following options:

Setting	Description
`Name`	Name of the partner portal as displayed on the portal's detail and edit pages, as well as the partner portal setup page. The name of the partner portal is not displayed on portal pages, but it does display in the browser title bar. The name of your portal must be unique for your organization and not already in use by a Customer Portal or partner portal. Furthermore, an error may occur if you name a Customer Portal "partner portal" Customer Portal
`Description`	A description of the partner portal as displayed on the portal's detail and edit pages. The description of the partner portal is not displayed in the portal.
`Login Enabled`	Allows users to log in to the partner portal. We recommend that you do not select this checkbox until you have completed configuring your portal. Note: When you enable the partner portal, the default portal will be set as `Login Enabled`.

Setting	Description
	Users must be able to log in to the partner portal, be within their user profile's restricted IP range, and be within designated Login Hours in order to be able to reset their passwords.
`Administrator`	Click the lookup icon (🔍) to choose a default administrator for your partner portal. All email notifications regarding your partner portal will be sent to this Salesforce user. When choosing an administrator for your partner portal, you can only select users that have the "Manage External Users" and "Customize Application" user permissions, and have access to the Documents folder that contains your partner portal `Header`. You cannot deactivate a user selected as a portal administrator.

Portal Default Settings

Setting	Description
`Logout URL`	The URL of the Web page that displays when users log out of the partner portal, for example, "http://www.acme.com." If a logout URL is not specified, portal users return to the login page when they log out.
`Show Action Confirmation`	Allows users to view confirmation messages after they complete an action in the partner portal. For example, after a user creates a lead in your partner portal, he or she views the message: "Lead has been created" if this setting has been enabled. Confirmation messages may help users clearly understand actions they have completed in your partner portal.
`HTML Messages Default Language`	Specifies the language that portal HTML messages are displayed in when custom language portal HTML messages are not configured. This setting is only available for organizations that have multiple languages enabled.

Email Notification Settings

Setting	Description
`From Email Address`	The email address from which all partner portal communication templates are sent, for example, "support@acme.com." Salesforce sends the emails automatically, but they appear to portal users as if they were sent from this email address. If a portal user responds to a communication template, the response is sent to this address.

Email Notification Settings

Setting	Description
`From Email Name`	The name associated with the "From" Email Address, for example, "Acme Partner Support."
`New User Template`	The email template used to send a username and initial password to all newly-enabled partner portal users. By default, a sample template is automatically selected for you. This template must be marked as `Available for Use`.
`New Password Template`	The email template used to send a new password to existing partner portal users when you reset their passwords.
`Lost Password Template`	The email template used to send a new password to existing partner portal users when they reset their own passwords by clicking **Forgot your password?** on the login page of the partner portal.
`Change Owner to Portal User Template`	The email template used to send a notification to partner portal users when they become the new owner of a record in the portal.

Look and Feel

Setting	Description
`Header`	A text or HTML file that allows you to incorporate your organization's branding into the header of your partner portal. Click the lookup icon (🔍) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab. The files you include in the `Header` and `Footer` lookup fields can have a combined size of up to 10 KB. We recommend that you do not add a header *and* a logo to your portal because they may not display properly together. You can position the logout link anywhere on the header by using the HTML tag: "`<a href="/secur/logout.jsp">Logout</a>`."
`Footer`	A text or HTML file that allows you to incorporate your organization's branding into the footer of your partner portal. Click the lookup icon (🔍) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab. The files you include in the `Header` and `Footer` lookup fields can have a combined size of up to 10 KB.
`Logo`	An image file (.jpg, .gif, .png) that allows you to incorporate your organization's branding into the top left header of your partner portal. Click the lookup icon (🔍) to choose a file that has been

Look and Feel

Setting	Description
	uploaded to a publicly accessible folder on the Documents tab and marked as an `Externally Available Image`. The file you include in the `Logo` lookup field can be up to 20 KB. We recommend that you do not add a header *and* a logo to your portal because they may not display properly together.
`Login Message`	A text or HTML file that allows you to incorporate your organization's branding into the header of the login page, forgot password page, and change password page of your partner portal. Click the lookup icon (🔍) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab. The file you include in the `Login Message` lookup field can be up to 2 KB. Note: JavaScript and CSS code are automatically removed from HTML files used as the portal login message.

4. Click **Save**.

Note: Contact Salesforce for information about the number of partner portals you can activate for your organization.

SEE ALSO:

Enable the Partner Portal

Setting Fonts and Colors for Your Partner Portal

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can customize the fonts and colors of the Salesforce partner portal to reflect your company's branding. Your portal's fonts and colors are specified in a portal "color theme." Select a predefined color theme and optionally, customize it to better match your branding. You can click the **See examples** link to see all of the theme attributes you can customize.

1. From Setup, enter *`Partners`* in the `Quick Find` box, then select **Settings**.
2. Select the name of your partner portal.
3. Click **Change Portal Fonts and Colors**.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To configure the fonts and colors for a partner portal

- "Customize Application"

4. Select a color theme from the `Color Theme` drop-down list. Select Custom from the `Color Theme` drop-down list to create your own theme from scratch. A preview of the color theme you select is automatically displayed in the Preview sections.
5. Optionally, customize the color of any theme you select by either:
   - Entering a hexadecimal value into any theme attribute, or
   - Clicking the hexadecimal value of any theme attribute and selecting a color from the point-and-click editor

   When you customize a theme, it is automatically renamed `Custom` when saved. You can customize the following options, which when customized, automatically display in the Preview sections:

Tab Styles

Theme Attribute	Description
`Current Tab Text`	Text color of the tab users have selected.
`Current Tab Background`	Background color of the tab users have selected.
`Current Tab Border`	Border color of the tab users have selected.
`Other Tab Text`	Text color of the tabs users have not selected.
`Other Tab Background`	Background color of the tabs users have not selected.
`Other Tab Border`	Border color of the tabs users have not selected.
`Tab Bar Background`	Background color behind all tabs.

Page Styles

Theme Attribute	Description
`Page Background`	Portal background color, excluding search, related lists, recent items, solution categories, document folders, and the Create New drop-down list.
`Text`	Text color, size, and font on all portal items, except for tabs, buttons, headers, and field labels. Optionally, you can change the percent displayed in the percent field to increase or decrease the size of all portal items. Additionally, you can change the font of all portal items, except for tabs, buttons, headers, and field labels from the drop-down list.
`Field Label Text`	Text color of the field names on records. Optionally, you can change the font of the text from the drop-down list.
`Link`	Text color of all links.
`Link Hover`	Text color of all links when a user hovers the mouse over them.
`Field Separator`	Color of the lines that separate fields on records.

Page Styles

Theme Attribute	Description
`Bottom Border`	Color of the line bordering the bottom of the portal.

Section Styles

Theme Attribute	Description
`Header Background`	Background color of all headings, including search, recent items, related lists, solution categories, documents folders, and the selected tab.
`Section Header Text`	Text color and font on the headers of search, related lists, recent items, solution categories, and document folders. Optionally, you can change the font of the text from the drop-down list.
`Left Border`	Border to the left of search, related lists, recent items, solution categories, document folders, and the Create New drop-down list. Optionally, you can change the number of pixels displayed in the pixel field to increase or decrease the thickness of the border. Additionally, you can select the style of the line displayed for the border from the drop-down list.
`Right Border`	Border to the right of search, related lists, recent items, solution categories, document folders, and the Create New drop-down list. Optionally, you can change the number of pixels displayed in the pixel field to increase or decrease the thickness of the border. Additionally, you can select the style of the line displayed for the border from the drop-down list.
`Top Border`	Border above search, related lists, recent items, solution categories, document folders, and the Create New drop-down list. Optionally, you can change the number of pixels displayed in the pixel field to increase or decrease the thickness of the border. Additionally, you can select the style of the line displayed for the border from the drop-down list.
`Bottom Border`	Border underneath search, related lists, recent items, solution categories, document folders, and the Create New drop-down list. Optionally, you can change the number of pixels displayed in the pixel field to increase or decrease the thickness of the border.

Section Styles

Theme Attribute	Description
	Additionally, you can select the style of the line displayed for the border from the drop-down list.
`Section Background`	Background color of search, related lists, recent items, solution categories, document folders, and the Create New drop-down list.

List Styles

Theme Attribute	Description
`List Header Text`	Text color of the field names selected as column headings on list views. Optionally, you can change the font of the text from the drop-down list.
`Header Underline`	Color of the lines underneath column headings on related lists and list views.
`Separator`	Color of the lines between records on list views.
`Row Highlight`	Color of a record when a user hovers the mouse over it on list views.

6. Click **Save** to save all changes to the theme values.

   Tip: Changes are visible to partner portal users when they refresh their browsers. Therefore, we recommend updating your portal color theme at times when users are least likely to visit your partner portal.

SEE ALSO:

Enable the Partner Portal

Customizing Your Partner Portal Tabs

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize partner portal tabs:

- "Customize Application"

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

In addition to custom objects, the following tabs can be displayed in the partner portal:

- Accounts
- Answers
- Articles (requires Salesforce Knowledge
- Cases
- Contacts
- Documents
- Ideas
- Leads
- Opportunities
- Entitlements
- Service contracts
- Solutions
- Salesforce CRM Content tabs
- Reports

You can choose which tabs display to users logged in to a Salesforce partner portal, and customize the order in which tabs display to portal users:

1. From Setup, enter `Partners` in the `Quick Find` box, then select **Settings**.
2. Select the name of your partner portal.
3. Click **Customize Portal Tabs**.
4. To add or remove tabs, select a tab title, and click the **Add** or **Remove** arrow to add or remove the tab to or from the Selected Tabs box. To change the order of the tabs, select a tab title in the Selected Tabs box, and click the **Up** or **Down** arrow.
5. Optionally, from the `Default Landing Tab` drop-down, you can select which tab to display to users when they log into your portal.
6. Click **Save**.

You can further specify which tabs users can access by editing tab settings in users' associated profiles and permission sets.

The page layouts of tabs on the partner portal are controlled by the page layouts configured in the profiles assigned to the portal.

To edit the tab layouts for a profile:

1. From Setup, enter `Partners` in the `Quick Find` box, then select **Settings**.
2. Select the name of your partner portal.
3. Select the name of the profile you want to edit from the Assigned Profiles related list.
4. Click **View Assignment** under page layouts next to the standard or custom object you want to edit.

5. Click **Edit Assignment**.
6. Select a new page layout next to the profile name you are editing.
7. Click **Save**.

Enabling Calendar and Events on the Home Tab

You can allow partner users to view a calendar and list of scheduled events on the Home tab of the partner portal. The calendar and events in the partner portal work the same as the calendar and events on the Home tab of Salesforce, with the following exceptions: spell check, event updates, enhanced list views, drag-and-drop scheduling, calendar sharing, and hover details are not supported in the partner portal.

Note: A partner user can only see calendars shared by:

- Other partner users assigned to the same account
- The channel manager for their account

Portal users can view tasks and events from their calendar. Additionally, portal users with the “Edit Events” permission can create, edit, and delete events.

Enabling the Welcome Component on the Home Tab

Include the Partner Portal Welcome component on home page layouts assigned to partner portal users. When users log in to your portal they receive a welcome message with their name, their channel manager's name, and links to both their company and personal profiles. They can click the linked channel manager name to send an email to that person. When portal users change information about themselves their user record is automatically updated but their contact record is not.

Note: The Partner Portal Welcome component is also available for the Customer Portal home page, however, it only provides a welcome message with the user's name.

Allowing Portal Users to View the Reports Tab

To allow portal users to view the Reports tab:

1. Grant portal users access to the folders on your Salesforce Reports tab that contain the reports you want them to run.
2. Set the organization-wide default sharing model to Private on objects you want portal users to report on.
3. Grant the “Run Reports” permission to portal users.

When you add the Reports tab to your partner portal, portal users:

- Can run reports but cannot customize reports or filter report results.
- Can export reports to Excel if they have the “Export Reports” permission.
- Do not have access to the Unfiled Public Reports and My Personal Custom Reports folders.
- Receive an insufficient privileges error if they run a report that contains objects they do not have permission to view.

Note: The Reports tab is only available to partner users with Gold Partner licenses.

SEE ALSO:

Enable the Partner Portal

Configure Multilingual HTML Messages for Partner Portals

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To configure languages in portals:

- "Customize Application"

> Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.
>
> Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

If your organization has multiple languages enabled, you can upload HTML messages in any of the languages supported by Salesforce and configure the messages to display in the portal based on portal user language settings. For example, you can upload an HTML message in French to display on the Home tab for portal users with French language settings, and an HTML message in English to display on the Home tab for portal users with English language settings.

Note the following before configuring multilingual HTML messages:

- Before you can add a multilingual HTML message to a portal, you must upload the HTML-formatted file in the Documents tab.
- Even if configured, portal HTML messages will not display on the Ideas, Reports, Content, or Solutions tabs.

To configure multilingual HTML messages:

1. To configure a display language for the partner portal, from Setup, enter `Partners` in the `Quick Find` box, then select **Settings**.
2. Click the name of the portal to edit.
3. Click **Add New Language** in the Assigned Languages related list.
4. Select a language from the `Language` drop-down list.
5. Click the lookup icon (🔍) next to a tab name, then select the HTML message to display on that tab. Optionally repeat this step for each tab that you want to display an HTML message.
6. Click **Save**.

SEE ALSO:

Enable the Partner Portal

Partner Portal Settings

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To modify partner portal settings:
- "Customize Application"

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

To edit the settings and communication templates for a partner portal:

1. From Setup, enter *`Partners`* in the `Quick Find` box, then select **Settings**.
2. Click the name of the portal you want to edit.
3. Click **Edit**.
4. Set the following options:

Setting	Description
`Name`	Name of the partner portal as displayed on the portal's detail and edit pages, as well as the partner portal setup page. The name of the partner portal is not displayed on portal pages, but it does display in the browser title bar. The name of your portal must be unique for your organization and not already in use by a Customer Portal or partner portal. Furthermore, an error may occur if you name a Customer Portal "partner portal" Customer Portal
`Description`	A description of the partner portal as displayed on the portal's detail and edit pages. The description of the partner portal is not displayed in the portal.
`Login Enabled`	Allows users to log in to the partner portal. We recommend that you do not select this checkbox until you have completed configuring your portal. Note: When you enable the partner portal, the default portal will be set as `Login Enabled`. Users must be able to log in to the partner portal, be within their user profile's restricted IP range, and be within designated Login Hours in order to be able to reset their passwords.

Setting	Description
`Administrator`	Click the lookup icon (🔍) to choose a default administrator for your partner portal. All email notifications regarding your partner portal will be sent to this Salesforce user. When choosing an administrator for your partner portal, you can only select users that have the “Manage External Users” and “Customize Application” user permissions, and have access to the Documents folder that contains your partner portal `Header`. You cannot deactivate a user selected as a portal administrator.

Portal Default Settings

Setting	Description
`Logout URL`	The URL of the Web page that displays when users log out of the partner portal, for example, “http://www.acme.com.” If a logout URL is not specified, portal users return to the login page when they log out.
`Show Action Confirmation`	Allows users to view confirmation messages after they complete an action in the partner portal. For example, after a user creates a lead in your partner portal, he or she views the message: “Lead has been created” if this setting has been enabled. Confirmation messages may help users clearly understand actions they have completed in your partner portal.
`HTML Messages Default Language`	Specifies the language that portal HTML messages are displayed in when custom language portal HTML messages are not configured. This setting is only available for organizations that have multiple languages enabled.

Email Notification Settings

Setting	Description
`From Email Address`	The email address from which all partner portal communication templates are sent, for example, “support@acme.com.” Salesforce sends the emails automatically, but they appear to portal users as if they were sent from this email address. If a portal user responds to a communication template, the response is sent to this address.
`From Email Name`	The name associated with the “From” Email Address, for example, “Acme Partner Support.”
`New User Template`	The email template used to send a username and initial password to all newly-enabled partner portal users. By default, a sample

Email Notification Settings

Setting	Description
	template is automatically selected for you. This template must be marked as `Available for Use`.
`New Password Template`	The email template used to send a new password to existing partner portal users when you reset their passwords.
`Lost Password Template`	The email template used to send a new password to existing partner portal users when they reset their own passwords by clicking **Forgot your password?** on the login page of the partner portal.
`Change Owner to Portal User Template`	The email template used to send a notification to partner portal users when they become the new owner of a record in the portal.

Look and Feel

Setting	Description
`Header`	A text or HTML file that allows you to incorporate your organization's branding into the header of your partner portal. Click the lookup icon (🔍) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab. The files you include in the `Header` and `Footer` lookup fields can have a combined size of up to 10 KB. We recommend that you do not add a header *and* a logo to your portal because they may not display properly together. You can position the logout link anywhere on the header by using the HTML tag: "`<a href="/secur/logout.jsp">Logout</a>`."
`Footer`	A text or HTML file that allows you to incorporate your organization's branding into the footer of your partner portal. Click the lookup icon (🔍) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab. The files you include in the `Header` and `Footer` lookup fields can have a combined size of up to 10 KB.
`Logo`	An image file (.jpg, .gif, .png) that allows you to incorporate your organization's branding into the top left header of your partner portal. Click the lookup icon (🔍) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab and marked as an `Externally Available Image`. The file you include in the `Logo` lookup field can be up to 20 KB.

Look and Feel	
Setting	**Description**
	We recommend that you do not add a header *and* a logo to your portal because they may not display properly together.
`Login Message`	A text or HTML file that allows you to incorporate your organization's branding into the header of the login page, forgot password page, and change password page of your partner portal. Click the lookup icon (🔍) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab. The file you include in the `Login Message` lookup field can be up to 2 KB. Note: JavaScript and CSS code are automatically removed from HTML files used as the portal login message.

5. Click **Save**.

SEE ALSO:

Enable the Partner Portal

Partner Portal Settings

Creating Partner Users

> Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.
>
> Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Once you have a partner account created, you can add partner users to the account as contact records. Partner users are Salesforce users with limited capabilities focused on managing leads. Partner users log in to Salesforce through the portal.

Before creating partners, you should configure your portals; otherwise, your partner users may attempt to log into your portal before your portals are ready.

To create a partner user:

1. View the partner account for which you want to create a partner user.
2. Create a new contact for the partner user. Choose **New** from the Contacts related list. Fill in the appropriate details, and click **Save**.
3. On the contact detail page, click **Manage External User** and choose **Enable Partner User**.
4. Edit the user record for this partner.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, edit, disable, or deactivate partner users:
- "Manage External Users"

To create contacts:
- "Create" on contacts

To view contacts:
- "Read" on contacts

5. Click **Save**.

Once a partner user has been created, the partner account and the partner user can be edited independently. Changes made to one are not reflected in the other.

To troubleshoot issues or ensure the portal is configured appropriately, on the contact detail page, click **Manage External User** and choose **Log in to Portal as User**. A new browser window opens and you are logged into the portal as the portal user.

Tips on Creating Partner Users

Consider the following when creating partner users:

- If you have enabled a user as a delegated administrator, the user cannot create a external user unless at least one partner profile has been added to the Assignable Profiles related list and the user has the "Manage External Users" permission.
- The **Role** drop-down is read-only the first time you enable a contact as a partner or customer user for an account. The next time you enable a contact on this account as a customer or partner user, you can select a **Role** for the user.
- The available profiles for the partner user are limited to the Partner User profile or profiles that have been cloned from it. Unlike a standard user, the partner user role is automatically assigned based on the account name. The partner user role is a subordinate of the account owner's role, therefore, all data for the partner user role rolls up to the partner account owner's role. Keep in mind that if you disable a portal user, their partner user role becomes obsolete and their data no longer rolls up to the partner account role.
- Partner users and contacts cannot be deleted. If you no longer want a partner user to have access to the portal, deactivate the partner user.
- Partner contacts cannot be owned by a non-partner account.

SEE ALSO:

Enable the Partner Portal

Enable the Partner Portal

Enabling Features in the Partner Portal

Enable Cases in the Partner Portal

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable cases for partner users:

- "Manage Profiles and Permission Sets"

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

When you enable cases in the partner portal, you can assign cases to partner users directly or using assignment or escalation rules. Partner users can edit cases, create new cases, add case comments, reassign cases, find case solutions, and create case teams. Partner users cannot edit case comments, associate assets with cases, or delete cases.

Note: Case comments added by partner portal users are public and can be viewed by any user that can view the case.

To enable cases in the partner portal:

1. Add the Cases tab to the list of available tabs in the partner portal.

2. In the partner user profile, verify that the cases tab setting is set to `Default On`.
3. In the partner user profile, enable the "Read," "Create," and "Edit" object permissions for cases.

After enabling cases in the partner portal, consider the following tips:

- Specify a case creation template to allow partner users to send a notification email to new contacts assigned to cases. From Setup, enter *`Support Settings`* in the `Quick Find` box, then select **Support Settings**.
- Configure case team roles to allow your partners to add case team members. From Setup, enter *`Case Team Roles`* in the `Quick Find` box, then select **Case Team Roles**.
- When viewing an email associated with a case, **Email Message List**, **Next**, and **Previous** links are not available to portal users.

SEE ALSO:

Enable the Partner Portal

Partner Portal Settings

Enabling Salesforce CRM Content in the Partner Portal

USER PERMISSIONS	
To set up and update the partner portal:	"Customize Application"
To create and edit profiles:	"Manage Profiles and Permission Sets"
To manage partner portal users:	"Manage External Users"
To create Salesforce CRM Content library permissions:	"Manage Salesforce CRM Content" OR "Manage Content Permissions"
To add users to a Salesforce CRM Content library:	"Manage Salesforce CRM Content" OR `Manage Library` checked in your library permission definition

EDITIONS
Available in: Salesforce Classic
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Salesforce CRM Content is available in the partner portal. Two levels of access to Salesforce CRM Content can be granted to partner portal users:

- Portal users without a Salesforce CRM Content feature license can download, rate, comment on, and subscribe to content if they have the "View Content on Portals" user permission. They cannot view potentially sensitive data such as usernames and download, version, and subscriber history. The content delivery feature is not available to portal users.

- Portal users with a Salesforce CRM Content feature license can access all Salesforce CRM Content features granted by their library permission(s), including contributing content, moving and sharing content among libraries, and deleting content. They can also view Salesforce CRM Content reports. The content delivery feature is not available to portal users.

Enable Salesforce CRM Content for Non-Licensed Users

After you have enabled the partner portal, complete the following steps to enable Salesforce CRM Content in your portals. Use these steps if you have not purchased Salesforce CRM Content feature licenses for your portal users.

1. Update your cloned Partner User profiles:
    a. Include the "View Content on Portals" user permission.
    b. Change the tab visibility for the Libraries, Content, and Subscriptions tabs from Tab Hidden to Default On.
    c. Assign the updated profile to partner portal users as needed.
2. Determine what privileges your portal users will have in each Salesforce CRM Content library by creating one or more library permissions.

    Note: A library permission can only grant privileges that a user's feature license or profile permits. For example, even though `Tag Content` is a library permission option, selecting it does not allow portal users without a Salesforce CRM Content feature license to tag content.

3. Determine which libraries you want your portal users to have access to. Ensure that confidential content is not available in these libraries.
4. Add portal users to libraries. Portal users with the Partner User profile or a clone of that profile can only be added to a library as part of a public group.
5. Add the Salesforce CRM Content tabs to each partner portal.

    Note: The Documents tab is not part of Salesforce CRM Content.

Enable Salesforce CRM Content for Licensed Users

After you have enabled the partner portal, complete the following steps to enable Salesforce CRM Content in your portals. Use these steps if you have purchased Salesforce CRM Content feature licenses for your portal users.

1. Update your cloned Partner User profiles:
    a. Optionally, add the "Create Libraries" user permission if you want to allow portal users to create and administer new libraries.
    b. Change the tab visibility for the Libraries, Content, and Subscriptions tabs from Tab Hidden to Default On.
    c. Assign the updated profile to partner portal users as needed.
2. Select the `Salesforce CRM Content User` checkbox on the user detail page for each partner portal user.
3. Determine what privileges your portal users will have in each Salesforce CRM Content library by creating one or more library permissions.

    Note: A library permission can only grant privileges that a user's feature license or profile permits. For example, even though `Tag Content` is a library permission option, selecting it does not allow portal users without a Salesforce CRM Content feature license to tag content.

4. Determine which libraries you want your portal users to have access to. Ensure that confidential content is not available in these libraries.

5. Add portal users to libraries. Portal users with the Partner User profile or a clone of that profile can only be added to a library as part of a public group.
6. Add the Salesforce CRM Content tabs to each partner portal.

   Note: The Documents tab is not part of Salesforce CRM Content.

SEE ALSO:

Enable the Partner Portal

Enabling Email in the Partner Portal

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable permissions:
- "Manage Profiles and Permission Sets"

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Enabling email in the partner portal allows partner users to send email from Activity History related lists in the partner portal. For example, a partner user can click the `Send An Email` button in the Activity History related list on a lead to send an email to the lead and log the email in the related list.

To allow partner users to send email from the partner portal, grant them the "Send Email" permission. For partner users to use email templates, you must make the templates available to them.

SEE ALSO:

Enable the Partner Portal

Enable Ideas in the Partner Portal

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up and update the partner portal:
- "Customize Application"

To create a community:
- "Customize Application"

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

After you set up your partner portal, follow the steps below to enable ideas in your portal:

1. To create an ideas community that's active and configured to be displayed in the portal, from Setup, enter *`Ideas Zones`* in the `Quick Find` box, then select **Ideas Zones**.
2. Add the Ideas tab to your partner portal.

3. If your organization has the Ideas and Answers Portal license, hide the Reports tab in the partner portal. Otherwise, your partner portal users receive an Insufficient Privileges message when they click the Reports tab.

SEE ALSO:

Enable the Partner Portal

Enabling Entitlement Management in the Partner Portal

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with the Service Cloud

USER PERMISSIONS

To set up and update the partner portal:

- "Customize Application"

To create and edit profiles:

- "Manage Profiles and Permission Sets"

To manage portal users:

- "Manage External Users"

> Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.
>
> Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can use the partner portal to provide your partners with access to entitlements, service contracts, or contract line items.

After you have set up entitlement management and enabled a partner portal, complete the following steps to add entitlement management to your portals.

1. Update your cloned Partner User profiles:
   a. Include the "Read" permission on entitlements, service contracts, or contract line items.
   b. Optionally, on the profiles of delegated partner user administrators, include the "Create" and "Delete" permissions on entitlement contacts. This lets delegated external user administrators update entitlement contacts.
   c. Verify that the tab visibility for the Entitlements or Service Contracts tabs are Default On. Contract line items display on service contracts.
2. At the bottom of the partner portal detail page, click **Edit Profiles** and activate the new profile.
3. Customize case page layouts to add the `Entitlement Name` lookup field. This lets partner users add entitlements to cases.

   > Tip: *Don't* add the following entitlement process fields to case page layouts for portal users because portal users shouldn't access information related to your internal support processes: `Entitlement Process Start Time`, `Entitlement Process End Time`, `Stopped`, and `Stopped Since`.

4. Optionally, customize related lists on accounts and contacts to add Entitlements. This lets delegated external user administrators create cases automatically associated with the right entitlements.
5. Add the Entitlements or Service Contracts tabs to each partner portal.
6. Assign the cloned profiles to your partner portal users:
   a. To create a new partner portal user, click **Manage External User** and choose **Enable Partner User** on the contact detail page. To update an existing user, click **Manage External User** and choose **View Partner User**.
   b. For a new user, select the cloned profile from the **Profile** drop-down menu. For an existing user, click **Edit** and then select the profile.

c. Click **Save**.

SEE ALSO:

Enable the Partner Portal

Enabling Answers in the Partner Portal

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up and update the partner portal:
- "Customize Application"

To create and edit profiles:
- "Manage Profiles and Permission Sets"

To create an answers community:
- "Customize Application"

> Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.
>
> Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can use the partner portal to provide your partners with access to an answers community.

To enable answers in your portal.

1. Set up your partner portal.

   When customizing your portal fonts and colors, note that answers only supports the following changes:

   - All tab styles
   - The following page styles:
     - Page Background
     - Text
     - Link
     - Link Hover

2. Set up answers, making sure that your answers community is configured to display in the partner portal.
3. Add the Answers tab to your partner portal.
4. Create partner portal users.
5. If you want your partner portal users to have different category group visibility settings than the account owner, change the visibility settings for the partner portal user.

   By default, partner portal users inherit which categories they can access from the account owner. For example, if the account owner has a role of CEO and the CEO role has full access to all the data categories in the category group assigned to answers, then partner portal users can also access all categories in the answers community. In some cases, you may want to limit which categories a partner portal user can access.

6. If your organization has the Ideas and Answers Portal license, hide the Reports tab in the partner portal. Otherwise, your partner portal users receive an Insufficient Privileges message when they click the Reports tab.

SEE ALSO:

Enable the Partner Portal

Managing Partner Users

USER PERMISSIONS

To manage partner portal users:	"Manage External Users"
To create, edit, and delete profiles:	"Manage Profiles and Permission Sets"
To create, edit, and delete page layouts:	"Customize Application"
To set field-level security:	"Manage Profiles and Permission Sets" AND "Customize Application"
To set sharing rules:	"Manage Sharing"

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Because your Salesforce partner portal has functionality that is similar to Salesforce, you manage your partner portal users in much the same way as you manage your Salesforce users.

Consider how the following items affect how you manage partner portal users:

Partner Portal Profiles

The permissions you assign to partner portal users define what functions they can perform within your organization's partner portal, such as whether users can view, create, or edit cases and custom object records. When you enable a partner portal, the Partner User profile is automatically created for your organization. The Partner User profile cannot be modified.

To enable partner users to log in to a partner portal, create profiles for your partners cloned from the Partner User profile. For each cloned profile, verify that the "API Only User" permission is not selected; if this permission is selected, users associated with the profile will not be able to log in to the partner portal. Cloning these profiles or creating permission sets also allows you to specify what portal users can do.

Partner Portal Sharing Rules

After you enable your partner portal, the following groups and sharing rule category are created:

Group or Category	Description
All Partner Portal Users group	Contains all partner portal users in your organization
All Internal Users group	Contains all Salesforce users in your organization
Roles and Internal Subordinates sharing rule category	Allows you to create sharing rules in which you can choose specific Salesforce users in your organization by role plus all of the users in roles below that role, excluding any partner portal roles

You can use these groups and the sharing rule category to easily create sharing rules that grant all of your partner portal or Salesforce users access to specific data. You can also create sharing rules between partner portal users and Salesforce users, but not between partner users associated with different partner accounts.

If Salesforce Knowledge is enabled in your partner portal, portal users can see articles as permitted by the category group visibility settings.

Partner Portal Role Hierarchy

A portal user role hierarchy is created for an account and its contacts when you enable the first partner portal user on that account. The account is added to the role hierarchy beneath the user that owns the account. Whenever you enable a contact as a partner portal user, he or she is automatically assigned to the User role in the account's portal role hierarchy. The default number of roles in portal accounts is three. You can reduce the number of roles or add roles to a maximum of three. Partner users can be assigned one of three roles:

- Executive
- Manager
- User

The Partner Executive role is immediately under the channel manager's role in the role hierarchy. The Partner Manager role is immediately under the Partner Executive role. The Partner User role is immediately under the Partner Manager role. Each role includes the partner account name as part of the role name. For example, if the partner account name is Acme, the three roles are Acme Partner Executive, Acme Partner Manager, and Acme Partner User. If the ownership of a partner account is changed to another channel manager, the partner user role is moved to that location in the role hierarchy.

Note: Be careful managing your role hierarchy. Partner users at a given role level are always able to view and edit all data owned by or shared with users below them in the hierarchy, regardless of your organization’s sharing model. Use administrative reports to manage your partner roles.

Accounts with different portal types have a separate role hierarchy for each portal. Role names include the portal type with which they are associated. For example, if Account A has both a partner portal and a Customer Portal, then roles for the Customer Portal are named “Account A Customer User” and roles for the partner portal are named “Account A Partner User.”

All users in a partner user role have read access to all contacts under their partner account even when the contact sharing model is private. Partner users have read-write access to tasks associated with any object they can access. They also have read access to events associated with any object they can access. Partner users have the same access to Salesforce Knowledge articles as the account owner.

To view the roles assigned to your partner portal users, create a custom report, choose Administrative Reports, select Users as the data type, and add `Role` to your report columns.

Deletion of Partner Portal Roles

When you delete partner portal roles, the roles are renamed to maintain the hierarchy. For example, if the Manager role is deleted from a three-role hierarchy of Executive, Manager, and User, then the Executive role is renamed to Manager but its ID remains the same. When you create a partner portal role, the hierarchy of the new portal role is automatically determined and created bottom-up.

You can delete multiple roles in bulk for better performance. For example, if most of your users are assigned the User role, you can delete the Executive and Manager roles. For more information on deleting partner roles, see the *SOAP API Developer's Guide*.

Super User Access

Users can be assigned super user access to give them access to data owned by other users belonging to the same role or those below in the hierarchy. For example, a Partner Manager with super user access can see data owned by other users in the Partner Manager role and the Partner User roles.

Partner Portal User Licenses

Partner portal users cannot perform all of the functions that a Salesforce user can because partner portal users are assigned to a special type of user license.

SEE ALSO:

Enable the Partner Portal

Assigning Partner Super User Access

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, edit, disable, or deactivate portal users:
- "Manage External Users"

To create contacts:
- "Create" on contacts

To view contacts:
- "Read" on contacts

Partner users can be assigned one of three roles: Partner Executive, Partner Manager, or Partner User (worker role).

Partner Super Users with Role	Can Access
Partner Executive	Data owned by all partner users and partner super users in the same role and those below them in the hierarchy (Manager and User roles).
Partner Manager	Data owned by all partner users and partner super users in the same role and those below them in the hierarchy (User roles).
Partner User (worker role)	Data owned by all partner users and partner super users in the same role (User roles).

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

To enable Partner Super User Access for your partner portal, see Enabling Partner Super User Access.

- To assign super user access, go to the contact detail page of a partner account, click **Manage External User** and select **Enable Super User Access**.
- To remove partner super user access, go to the contact detail page of a partner account, click **Manage External User** and choose **Disable Super User Access**.

Example: Consider these guidelines:

- Partner super users can access the data owned by other partner users and partner super users of the same role or those below them in the portal account hierarchy, even if the organization-wide default setting is Private.
- Partner super user access applies to cases, leads, custom objects, and opportunities only. Consider two partner super users with the same role under the same account, User A owns a few opportunities, and User B has manual share to another opportunity. Then User A will have access to all opportunities including those that User B has access to.

SEE ALSO:

Partner Portal Settings

Enabling Partner Users to Request Meetings

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up and update the partner portal:
- "Customize Application"

To create and edit profiles:
- "Manage Profiles and Permission Sets"

To set up the request a meeting feature:
- "Customize Application"

> Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.
>
> Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

After you enable your partner portal and set up the Request a Meeting feature, complete the following steps to let your Partner users request meetings with contacts, leads, and person accounts:

1. Update your custom Partner User profiles:
   a. Include the "Send Email" and "Edit Events" user permissions.
   b. Verify that the tab visibility for the Contacts and Leads tabs is Default On.
2. Ensure that the custom Partner User profile is active and assigned to your Partner users.

SEE ALSO:

Enable the Partner Portal

Delegate Partner User Administration

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage partner portal users:
- "Manage External Users"

To create, edit, and delete profiles:
- "Manage Profiles and Permission Sets"

> Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.
>
> Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can delegate a subset of administrative rights to external users that have a partner user license. Delegated external user administrators can perform any of the following tasks for users, including both customer users and partner users, associated with their account:

- Create external users
- Edit external users
- Reset passwords for external users
- Deactivate existing external users

> Note: When a delegated external user administrator deactivates a portal user, the administrator doesn't have the option to remove the portal user from any teams that user is a member of.

You must use the original profile user interface to delegate administration rights for a partner user. If you're using the enhanced profile user interface, disable it temporarily in the User Interface settings to complete this procedure.

To delegate a partner user administration rights:

1. From Setup, enter *`Profiles`* in the `Quick Find` box, then select **Profiles** and click a custom partner profile.

You cannot edit the Partner User profile.

2. Click **Edit**.
3. Select **Delegated External User Administrator**.
4. Click **Save**.
5. Click **Edit** in the Delegated External User Profiles related list.
6. Select the external user profiles you want users with this profile to be able to administer. An external user delegated administrator can manage external users with Customer Portal, partner portal, or Communities profiles, as long as the users with the profile are under the same account.
7. Click **Save**.

To change which profiles a delegated external user administrator can edit:

1. From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles** and click a custom partner profile.

   You cannot edit the Partner User profile.

2. Click **Edit** in the Delegated External User Profiles related list.
3. Select the external user profiles you want users with this profile to be able to administer.
4. Click **Save**.

Delegated portal user administrators can click **Manage External User**, then **View Partner User** on the contact's detail page to view and edit the partner portal user's details:

- Click **Edit** to edit a partner portal user's details.
- Click **Reset Password** to reset the partner portal user's password.
- Click **Edit** and deselect the `Active` checkbox to deactivate the user.

Note: Delegated partner user administrators can update portal users on any account to which they are transferred.

Tips on Setting Up Delegated Portal User Administration

Consider the following when setting up delegated portal user administration:

- On the profile of users for which you are granting delegated portal administration:
  - Add the “Create” and “Edit” permissions on contacts so that delegated portal administrators can create and update contacts related to their account.
  - Set the Accounts and Contacts tab settings to Default On so that delegated portal administrators can view the Accounts and Contacts tabs and easily manage contacts related to their accounts.
- Add the Accounts and Contacts tabs to your portal.
- Set field level security and page layouts so that delegated portal user administrators can only access the account, contact, and case fields you specify.

SEE ALSO:

Enable the Partner Portal

Enable the Partner Portal

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable the partner portal:
- "Customize Application"

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

To enable the partner portal:

1. From Setup, enter *`Partners`* in the `Quick Find` box, then select **Settings**.
2. Click **Edit**.
3. Select the `Enable Partner Portal` checkbox.
4. Click **Save**.

Note: After you enable the partner portal, you cannot disable it. However, you can prevent users from logging into your partner portal. For more information, see Partner Portal Configuration on page 109.

After you enable the partner portal for your organization, you can then create one or more partner portals to satisfy the various business needs of your customers..

Note: You can create a maximum of 5 partner portals in your organization. Increases to that number are subject to product manager approval and require detailed use cases.

When you enable the partner portal, the following items are automatically added to your organization:

Partner User profile

You can assign partner portal users to profiles cloned from this profile. For each cloned profile, verify that the "API Only User" permission is not selected; if this permission is selected, users associated with the profile will not be able to log in to the partner portal.

Enable As Partner button on account records

Allows you to create a partner account.

Enable Partner Portal User and View Partner Portal User buttons on contact records

Allows you to create a new partner user or view existing partner users.

"All Partner Portal Users" and "All Internal Users" groups along with the "Roles and Internal Subordinates" sharing rule category

You can use these groups and the sharing rule category to easily create sharing rules that grant all of your partner portal or Salesforce users access to specific data.

Group or Category	Description
All Partner Portal Users group	Contains all partner portal users in your organization
All Internal Users group	Contains all Salesforce users in your organization
Roles and Internal Subordinates sharing rule category	Allows you to create sharing rules in which you can choose specific Salesforce users in your organization by role plus all of

Group or Category	Description
	the users in roles below that role, excluding any partner portal roles

SEE ALSO:

Partner Portal Settings

Partner Portal Configuration

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To configure a partner portal:

- "Customize Application"

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Once you have created a partner portal, you can customize it to meet your business needs. By customizing your partner portal, you can satisfy the needs of your various channels.

To customize your partner portal:

1. From Setup, enter `Partners` in the `Quick Find` box, then select **Settings**.
2. Click the name of the portal you wish to customize.
3. Configure the portal settings and communication templates.
4. Configure the fonts and colors used on the portal.
5. Configure the available tabs for the portal.
6. Assign partner profiles to the portal.
7. Configure portal languages.
8. Optionally, add the Partner Portal Welcome component to home page layouts assigned to portal users. The welcome component displays a welcome message with the user's name, their channel manager's name, and links to their company and personal profiles.
9. Optionally, add the Partner Portal Lead Inbox component to home page layouts assigned to portal users. When a user logs in to your portal, they see a list of leads for their lead queues. The user can click **Accept** next to a lead to take ownership of it; they won't see complete lead details until they click **Accept**.

SEE ALSO:

Partner Portal Settings

Assigning Partner Profiles to Partner Portals

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign partner profiles to partner portals:
- "Customize Application"

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Portal users can only log into partner portal assigned to their profile. To assign a profile to a partner portal:

1. From Setup, enter `Partners` in the `Quick Find` box, then select **Settings**.
2. Select the name of your partner portal.
3. Click **Edit Profiles** in the Assigned Profiles section.
4. Select the `Active` checkbox next to the profile you want to assign to the portal.

A portal user can access all the partner portals assigned to his or her profile with one username and password.

You can view the number of active users associated with each profile assigned to a partner portal on the `Users` field on the Assigned Profiles section.

SEE ALSO:

Partner Portal Settings

Partner Portal Best Practices

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Implementation Tips

- Portal users can only log into partner portals assigned to their profile.

  A portal user can access all the partner portals assigned to his or her profile with one username and password.

  You can view the number of users associated with each profile assigned to a partner portal on the `Users` field on the Assigned Profiles section.

- The login URL of each partner portal you create contains a unique identifier, such as `portalId=060D00000000Q1F`. You can find this identifier on the portal detail page. The unique identifier determines the specific portal a user can access. If a user accesses a login URL that does not contain a unique identifier, they are automatically directed to the login URL of the first partner portal you created. Note that portal users can only log into a partner portal using the portal's login page and not through the Salesforce login page.
- The settings on the following items apply to both your organization *and* your partner portals:

  - List views
  - Search layouts
  - Workflow alerts

Best Practices

- Because you can uniquely customize the fonts, colors, email templates, and login message of each partner portal you create, you can build a partner portal for each partner organization supported by your organization, or for different partner tiers or communities.

  Note: JavaScript and CSS code are automatically removed from HTML files used as the portal login message.

- You cannot delete a partner portal, but you can prevent users from logging into a portal by deselecting the `Login Enabled` checkbox.
- You can create multiple partner portals that display different tabs for users with the same profile, as long as the profile has access to each object displayed on a tab.
- You can set the default number of roles for partner portal accounts. This benefits your partner portal by reducing the number of unused roles.
- When you enable the partner portal, the default portal will be set as `Login Enabled`. Disable that setting, and re-enable it when the default portal is ready for partner users to login.
- Let your partner users know they can make their channel manager the owner of an object.
- Create a home page layout for your partner users with custom links to frequently used features.
- Include the Partner Portal Welcome component on home page layouts assigned to partner portal users. When users log in to your portal they receive a welcome message with their name, their channel manager's name, and links to both their company and personal profiles. They can click the linked channel manager name to send an email to that person. When portal users change information about themselves their user record is automatically updated but their contact record is not.
- Customize the Custom Links home page component to include links that your partner users can use, or remove it from the home page layout.
- Partner users cannot set reminders on tasks. Create a process to help them manage their tasks without reminders.
- You can add the Partner Portal Lead Inbox component on home page layouts assigned to partner portal users.We recommend hiding important lead fields, such as `Company Name` and `Lead Name`, from partner portal users so that they don't selectively choose which leads to accept.

Tips for Setting Up Partner Portal Channel Managers

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Channel managers are the internal users that manage your partners. Before enabling a portal, you need to ensure your channel managers have the appropriate permissions so they can manage partners.

The two main areas available for configuring your channel managers are profiles and roles.

Channel Manager Roles

Your role hierarchy determines what data your users can access. Users can always view and edit records that they own. In addition, users can always view, edit, and report on data owned by or shared with users below them in your role hierarchy. Channel manager roles are always directly above their partner users' roles in the hierarchy, giving channel managers access to all of the data owned by the partners they manage. When partner users are created on a partner account, Salesforce automatically places the partner users' role beneath the role of the channel manager who owns that partner account. To help you manage your channel managers and partner users, create a logical channel manager role structure.

Channel Manager Profiles

Profiles determine the permissions users have, page layouts they see, the tabs and record types available to them, and other settings. Create a unique profile and design its settings specifically for channel managers. Use these tips when creating this profile:

Make the following tabs available to channel managers

Leads, Accounts, Contacts, Opportunities, Documents, and Products. Also, if you plan to use Solutions or custom objects, make them available to your channel managers.

Assign record types

Assign the appropriate lead record types to your channel manager profiles.

Assign page layouts

Assign the appropriate page layouts to your channel manager profiles. Ensure that the **Enable Partner Portal Login** and **View Partner Portal User** buttons are included on the contact page layout for your channel managers.

Enable the “Manager Partners” permission

When this permission is enabled, channel managers can enable new partner accounts and partner users.

Make the `Partner Account` field visible to channel managers on leads, accounts, and opportunities

This allows channel managers to create list views or reports for tracking partner user activity.

Make the `Last Transfer Date` field visible to channel managers on leads

This allows channel managers to create lists views or reports for tracking partner user activity.

Additional Tips

- Create a public group for channel managers. You can use this group for filtering and controlling access to documents.
- Create a lead queue for channel managers. You can use this queue for lead assignment rules.

SEE ALSO:

Partner Portal Settings

Partner Portal Default Communication Templates

> **Note:** Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.
>
> Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To modify default partner portal communication templates:

- "Customize Application"

You can set default communication templates for your partner portals. Default communication templates will be used for partner communication unless you have specified templates for a particular portal. In addition, if a partner user is assigned to more than one portal, the default communication templates will be used when communicating with that user.

To set the default communication templates for the partner portal:

1. From Setup, enter *`Partners`* in the `Quick Find` box, then select **Settings**.
2. Click **Set Default Email Templates for All Portals**
3. Click **Edit**.
4. Set the following options:

Email Notification Settings

Setting	Description
`From Email Address`	The email address from which all partner portal communication templates are sent, for example, "support@acme.com." Salesforce sends the emails automatically, but they appear to portal users as if they were sent from this email address. If a portal user responds to a communication template, the response is sent to this address.
`From Email Name`	The name associated with the "From" Email Address, for example, "Acme Partner Support."
`New User Template`	The email template used to send a username and initial password to all newly-enabled partner portal users. By default, a sample template is automatically selected for you. This template must be marked as `Available for Use`.
`New Password Template`	The email template used to send a new password to existing partner portal users when you reset their passwords.
`Lost Password Template`	The email template used to send a new password to existing partner portal users when they reset their own passwords by clicking **Forgot your password?** on the login page of the partner portal.
`Change Owner to Portal User Template`	The email template used to send a notification to partner portal users when they become the new owner of a record in the portal.

5. Click **Save**.

SEE ALSO:

Partner Portal Settings

Customizing the Partner Portal Lead Inbox Component

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable and customize the Partner Portal Lead Inbox component:

- "Customize Application"

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Include the Partner Portal Lead Inbox component on home page layouts assigned to partner portal users. When a user logs in to your portal, they see a list of leads for their lead queues. The user can click **Accept** next to a lead to take ownership of it; they won't see complete lead details until they click **Accept**.

Note: The Lead Inbox only displays on the user's home page when there are leads to accept. When the user accepts a lead, they become the owner of the lead and the lead disappears from the Lead Inbox.

After you add the component to home page layouts assigned to portal users, you can choose the columns that show up:

1. From Setup, enter *`Partners`* in the `Quick Find` box, then select **Settings**.
2. Click the name of your partner portal.
3. Click **Customize Lead Inbox**.
4. Add, remove, or rearrange fields from the Selected Fields list.

   Note: We recommend hiding important lead fields, such as `Company Name` and `Lead Name`, from partner portal users so that they don't selectively choose which leads to accept.

5. Click **Save**.

SEE ALSO:

Partner Portal Settings

About Partner Portal User Management

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

There are two types of users for partner portals—channel managers and partner users.

Channel managers are the internal users that manage your partners. Before enabling a portal, you need to ensure your channel managers have the appropriate permissions so they can manage partners.

Partner users are Salesforce users with limited capabilities. They are external to your organization but sell your products or services through indirect sales channels. They are associated with a particular partner account, have limited access to your organization's data, and log in via a partner portal.

The following table shows the storage per license as well as which features the partner user can access on the portal.

	Gold Partner License Type
Storage per license	5 MB of data storage per user
Documents	Yes
My Account Profile	Yes
Leads	Yes
Custom Objects	Yes
Approvals	Yes. Users can submit records for approval and view the status of approval requests in the Approval History related list on record detail pages, but can't be assigned as approvers.
Accounts	Yes
Opportunities	Yes
Salesforce CRM Content (Read Only)	Yes
Reports	Yes
Delegated External User Administration	Yes
Email	Yes
Cases	Yes

SEE ALSO:

Partner Portal Settings

Setting Partner Portal Role and User Defaults

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set the number of roles per portal account

- "Customize Application"

To enable partner super user access

- "Customize Application"

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can set these partner portal role and user defaults:

- Set the default number of roles for partner portal accounts on page 116
- Enable Partner Super User Access on page 117

SEE ALSO:

Partner Portal Settings

Roles Per Partner Portal Account

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set the number of roles per portal account:

- "Customize Application"

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You can set the default number of roles for partner portal accounts. This benefits your partner portal by reducing the number of unused roles. You can set up to three roles; the system default is three.

For example, if you currently have three roles created when an account is enabled for your partner portal, but only need one role for new accounts, you can reduce the number of roles to one.

To set the number of roles per partner portal account:

1. From Setup, enter *`Partners`* in the `Quick Find` box, then select **Settings**.
2. Click `Set Portal Role and User Defaults`.
3. In the Portal Role and User Defaults page, click **Edit**.
4. In the `Number of Roles` drop-down list, set your default number of roles per partner portal account.
5. Click **Save**.

The number of roles for existing portal accounts doesn't change with this setting.

SEE ALSO:

Partner Portal Settings

Enabling Partner Super User Access

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Partner Super User Access:
- "Customize Application"

> Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.
>
> Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

You must have a partner portal enabled to use Partner Super User Access.

To enable Partner Super User Access:

1. Click From Setup, enter *`Partners`* in the `Quick Find` box, then select **Settings**.
2. In the Partner Relationship Management Settings page, click **Set Portal Role and User Defaults**.
3. Click **Edit** and select the `Enable Partner Super User Access` checkbox.

You can disable Partner Super User Access by deselecting the `Enable Partner Super User Access` checkbox. However, if you reenable this feature, all users who were assigned Super User Access before the feature was disabled will automatically gain Super User Access again. See Assigning Partner Super User Access for more information.

SEE ALSO:

Partner Portal Settings

Tracking Partner Activity

Note: Starting in Summer '13, the partner portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner portals may continue to use their partner portals or transition to Communities. Contact your Salesforce Account Executive for more information.

Tracking partner activity is important to ensure that your leads and opportunities are being managed effectively. Using the `Partner Account` field on leads and opportunities, you can create custom reports and list views that help you track the work partner users are doing.

Tip: When creating a list view or report, to include all leads or opportunities associated with a partner account, use "Partner Account not equal to" and leave the third field in the filter blank.

Tips for tracking partner user activity:

- Create list views to indicate partner lead and opportunity activity during the last week.
- Create a dashboard showing the number of leads created in the last week that are owned by partners.
- Create a list view of leads assigned to partners that have not been updated recently.
- Create forecast reports on partner user opportunities.
- Use the lead `Last Transferred Date` field to search for leads that have not been acted upon in a timely fashion.
- If you are using customizable forecasting, assign a user as a forecast manager for each partner role in your forecast hierarchy. Assigning someone as a forecast manager means that all forecasts from users below that user in the forecast hierarchy roll up to that person.

  Note: When you transfer portal users between accounts, the portal users' roles are updated, so when you transfer a partner user to another account:

  - Opportunities on each account are recalculated through your Salesforce org's forecast hierarchy.
  - Opportunities that the partner user owns remain in the previous account.

SEE ALSO:

Partner Portal Settings

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create custom list views:
- "Read" on the type of record included in the list

To create, edit, save, and delete reports:
- "Run Reports"

  AND

  "Read" on the records included in reports

  AND

  "Create and Customize Reports"

To create, edit, and delete dashboards:
- "Manage Dashboards"

Setting Options for Selling

Enterprise Territory Management

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Enterprise Territory Management helps you model your sales territories into a logical but flexible structure that connects sales reps to the accounts they sell to.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

Salesforce's original territory management feature lets you grant users access to accounts based on criteria such as postal code, industry, revenue, or a custom field relevant to your business. Enterprise Territory Management builds upon the original feature by introducing territory types, territory models, and territory model states. These components let you create and preview multiple territory structures and strategies before you activate and implement the one that works best. Enterprise Territory Management also offers easier assignments between territories, accounts, and opportunities. Custom reports help you organize your territory model for optimum coverage, assess territory effectiveness, and modify your model if necessary. Your team can use Chatter to collaborate as you design and build your territory model.

For comprehensive instructions for implementing this feature, see the *Enterprise Territory Management Implementation Guide*.

SEE ALSO:

Enterprise Territory Management Implementation Guide

Enterprise Territory Management Concepts

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Learn about the features and related concepts that make Enterprise Territory Management so powerful and easy to use. Understanding these concepts will help you model your territories more effectively.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

IN THIS SECTION:

Territory Type

Territory types help you organize your territories by key characteristics important to your company. Every territory you create must have a territory type. Territory types are used for organizing and creating territories *only:* they do not appear on territory model hierarchies.

Territory Type Priority

Specifying and managing territory type priority information helps you choose the appropriate territory type for territories you create or edit. There are no predefined priority options, so your organization should create its own priority scheme. For example, `001` may indicate that a territory type is the highest priority or the lowest. Make sure your scheme can scale as you add more territory types.

Territory

Territories organize groups of accounts and the Salesforce users who work with those accounts. Territories are created based on territory types.

Territory Model

A territory model represents a complete territory management system for your organization. Modeling lets you create and preview multiple territory structures and different account and user assignments before you activate the model that works best.

Territory Hierarchy

The territory hierarchy shows a model's territory structure and serves as its main interaction point. Start from the hierarchy to create, edit, and delete territories; run assignment rules for territories, and navigate to territory detail pages for more information. From the hierarchy, you can also assign territories to opportunities, run assignment rules at the model level, and activate or archive the model.

Territory Model State

Territory model state indicates whether a territory is in the planning stage, in active use, or archived. Your organization can have only one `active` territory model at a time, but you can create and maintain multiple models in `planning` or `archived` state to use for additional modeling or reference.

How do Permissions Affect Feature and Data Access in Enterprise Territory Management?

When implementing Enterprise Territory Management, make sure you understand how the feature's permissions affect administration and provide access to records and data.

Territory Type

Territory types help you organize your territories by key characteristics important to your company. Every territory you create must have a territory type. Territory types are used for organizing and creating territories *only:* they do not appear on territory model hierarchies.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

For example, you might create a territory type called *`Universal Telco Named Accounts`*, then from that type, create territories that include named accounts. Or you might create a territory type called *`US Geographic`*, and from that type create territories based on states or regions.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

When you create a territory type, make sure the label and description clearly indicate what kinds of territories should belong to that type.

Territory Type Priority

Specifying and managing territory type priority information helps you choose the appropriate territory type for territories you create or edit. There are no predefined priority options, so your organization should create its own priority scheme. For example, *`001`* may indicate that a territory type is the highest priority or the lowest. Make sure your scheme can scale as you add more territory types.

When you create a new territory, you select a territory type from the `Territory Type` lookup field. From the lookup, you can view the territory type's assigned priority.

Example: Your organization uses territory type priority to reflect your sales strategy for the year. Your organization expects more opportunities within the US east coast than the US west coast in the coming year, so the East Coast territory type is assigned priority *`001`* and the West Coast territory type is assigned *`005`*. These priority assignments help those creating territory records make the right territory type choice. At mid-year, you project unexpected growth opportunities in the Great Lakes region, so you create a new territory type called Great Lakes and assign it priority *`003`* to reflect the change in your sales strategy.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Territory

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Territories organize groups of accounts and the Salesforce users who work with those accounts. Territories are created based on territory types.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

The territory record shows you assigned users, manually assigned accounts, and rules that assign accounts automatically. A territory can have both parent and child territories. Depending on how your organization assigns accounts, an account may be assigned to more than one territory.

Territory Model

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

A territory model represents a complete territory management system for your organization. Modeling lets you create and preview multiple territory structures and different account and user assignments before you activate the model that works best.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Each territory model features a graphical hierarchy. The hierarchy shows your model's territory structure (including parent and child territories) and lets you create, edit, and delete territories and view their detail pages. Your organization can create and modify up to four different territory models at a time, but only one model can be active at any time. Activate the model you want to use to finalize its user and account assignments.

Territory Hierarchy

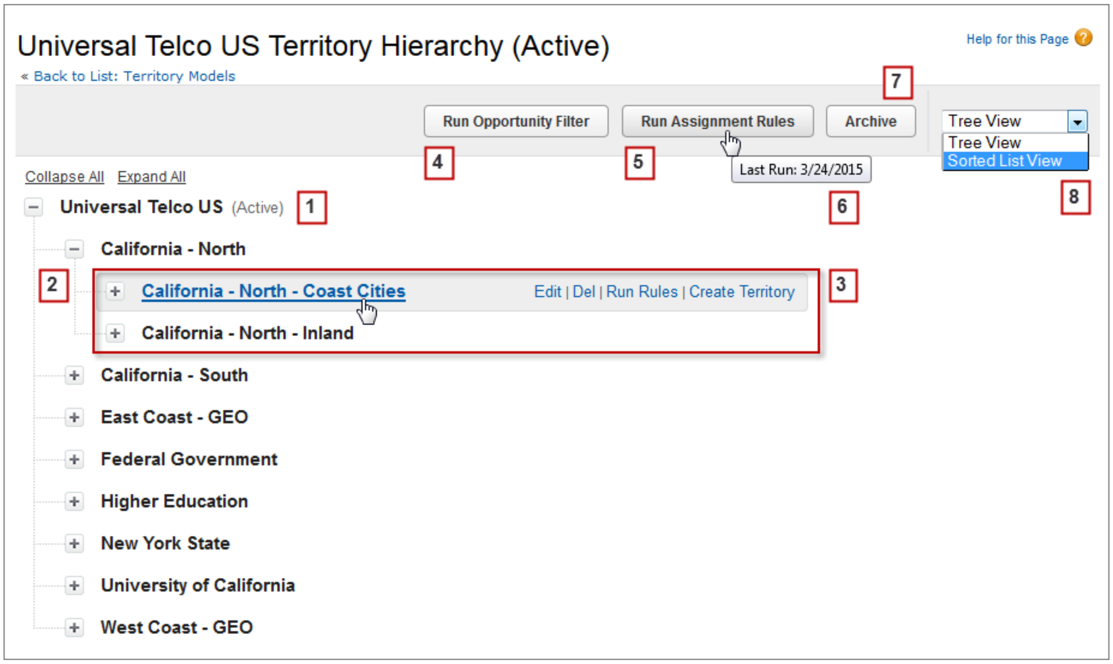
EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The territory hierarchy shows a model's territory structure and serves as its main interaction point. Start from the hierarchy to create, edit, and delete territories; run assignment rules for territories, and navigate to territory detail pages for more information. From the hierarchy, you can also assign territories to opportunities, run assignment rules at the model level, and activate or archive the model.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.



The name and state of the territory model appear at the top node of the hierarchy (1). Parent and child territories are nested beneath the model name (2). Create or edit new child territories or run their assignment rules (3). Run the filter that assigns territories to opportunities (4). Run assignment rules for all territories in the model (5). Hover to learn when rules were last run (6). Set the model's state to `Active` or `Archive` (7). Toggle to a sorted list view and back to tree view (8).

Territory Model State

Territory model state indicates whether a territory is in the planning stage, in active use, or archived. Your organization can have only one `active` territory model at a time, but you can create and maintain multiple models in `planning` or `archived` state to use for additional modeling or reference.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Some states reflect a territory model's lifecycle and others indicate errors in processing when states are changed.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Lifecycle State	Definition
`Planning`	The default state for every new territory model you create. The `Planning` state lets you preview a model's territory hierarchy before deploying it. Users have no territory-related access to accounts in models that are in the `Planning` state.
`Active`	The state of a territory model after you activate it and all processing is complete. Only *one* model in your Salesforce organization can be active at a time. A model in `Active` state lets users view model details, including hierarchies, territories, and all assigned accounts and users. Users

Lifecycle State	Definition
	assigned to territories within an active model can access and modify accounts they are assigned to within that model.
`Archived`	The state of a territory model after you archive it and all processing is complete. An archived model no longer provides account access to users, but it does let administrators view hierarchy and rule assignments as they were configured when the model was active. Only the *active* model can be archived, and archived models cannot be reactivated. When you archive a territory model or delete a territory on an active model, the `Territory` field is reset to a blank value on opportunity records with those territories assigned.

Error State	Definition
`Activation Failed`	An error occurred during activation. Check your email for more information from Salesforce.
`Archiving Failed`	An error occurred during activation. Check your email for more information from Salesforce.

How do Permissions Affect Feature and Data Access in Enterprise Territory Management?

When implementing Enterprise Territory Management, make sure you understand how the feature's permissions affect administration and provide access to records and data.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Make sure user permissions provide the appropriate level of access for users. For example, you might want Sales Operations managers and selected Sales managers to be able to manage territories. If so, assign them the "Manage Territories" permission. Anyone who will also create account assignment rules also needs the "View All" permission on Accounts.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Users who need to:	Require these permissions, roles, or ownership:
• Create territory models and all related records (such as territory types) • View and manage territory models in all states: `Planning`, `Active`, and `Archived` • Activate, archive, delete, or clone territory models • View territory information on territory-assigned account records for territories in models in *all* states (`Planning`, `Active`, and `Archived`)	Manage Territories

Users who need to:	Require these permissions, roles, or ownership:
• Create or edit account assignment rules	Manage Territories AND View All on Accounts Note: Which fields are available for account assignment rules depends on account field-level security settings, if any. For example, a user has the appropriate permissions for creating account assignment rules, but her profile prevents her from viewing the Account object's `Annual Revenue` field. She will not be able to create account assignment rules that include that field.
• View the Salesforce Setup tree, including territories settings • View the territory model in `Active` state, including its related records (such as territory types and assignment rules) and other elements (such as the territory hierarchy) • View the names of all account records assigned to territories in the `Active` territory model • View territory information on territory-assigned account records for territories in models in the `Active` state only	View Setup and Configuration Note: View Setup and Configuration is enabled by default for the Standard User profile.
View data for models in `Planning` and `Archived` states on reports that include territories, assigned records, or rules	Manage Territories
Manually assign a territory to an opportunity	Sharing access for the opportunity's account. Users who have sharing access to the account can assign any active territory to the opportunity. Those who do not can assign only a territory that is also assigned to the opportunity's account. Note: For manual territory assignments, Salesforce suggests opportunities assigned to the territory's account, but those with sharing access can search for and assign any territory in the active territory model. When a territory is assigned to an opportunity, that opportunity is shared with all Salesforce users assigned to that territory's parent in the territory model hierarchy.

Manage Your Organization's Sales Territories

Use Enterprise Territory Management to manage and maintain your organization’s sales territories. Create territory types, build a model, and then add and test your account assignment rules. When you’re satisfied with your model, activate it, then assign users and accounts. Roll it out to your organization, and then run reports to assess its impact and make adjustments if necessary.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Before you begin building your territory model, plan your approach. Choose organizing characteristics such as industry, annual revenue, or location information to divide your organization’s accounts into logical segments that work for the way you do business.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage territories:

- “Manage Territories”

IN THIS SECTION:

Enable Enterprise Territory Management

Starting with Winter ’15, Enterprise Territory Management is ready to be enabled by administrators in new Salesforce organizations.Organizations created before Winter ’15 need to call salesforce.com to enable the feature. Enterprise Territory Management cannot be enabled in existing organizations that have Customizable Forecasting enabled.

Define Enterprise Territory Management Settings

Define and configure settings for Enterprise Territory Management.

Use Chatter to Collaborate on Territory Models

Enable Chatter Feed Tracking on the Territory Model object to collaborate on model development directly within model records. Your team can post and respond to comments, attach files, and get notifications when model states change or key fields are updated.

Build a Territory Model

A territory model organizes all the elements of your organization’s territory management plan, including a territory hierarchy, account assignments, and user assignments. Keep your model in the `planning` state as you build your hierarchy, define assignment rules for territories, add users to territories, and run your rules to see the resulting account assignments.

Manually Assign One or More Territories to an Account

Assign one or more territories to an account directly from the account record. Only territories that belong to models in `Planning` or `Active` state can be assigned to accounts.

Manually Assign One or More Assignment Rules to a Territory

Assign one or more object assignment rules to a territory directly from the territory record. Available rules come from the territory model the territory belongs to.

Manually Assign a Territory to an Opportunity

On an opportunity record, you can assign and track the territory whose assigned sales reps work that opportunity. Manual territory assignments are controlled by your sharing access to the opportunity’s assigned (parent) account. When you assign a territory to an opportunity, that opportunity is shared with all Salesforce users assigned to that territory's parent in the territory model's hierarchy.

Run the Opportunity Territory Assignment Filter

The opportunity territory assignment filter automatically assigns territories to opportunities based on the filter logic in the Apex class.

Clone a Territory Model

Cloning lets you make a copy of a territory model that you can use to test out different territory characteristics. The new model includes the original’s territories, assignment rules, users, and manually assigned accounts. Only models in `Planning`, `Active`, or `Archived` state can be cloned. When cloning is complete, the new model is in `Planning` state.

Assign Users to Territories

Assign users to the territories they will operate in to sell products and services. You can assign users to territories that belong to models in `Active` or `Planning` state, though assignments made within `Planning` state models are for planning purposes only: they *do not* affect user access to records.

Identify Territory Users by Territory Role

Keep track of user functions within territories by creating territory roles and assigning them to territory users as needed. Users can even have different roles in different territories.

Activate a Territory Model

When you're satisfied with the structure of your territory model and its territory account assignments, you're ready to activate it. Remember that you can also maintain models in `Planning` and `Archived` states for further modeling and reference.

Configure Enterprise Territory Management Permissions and Access for Administrators and Users

An important step in implementing Enterprise Territory Management is making sure the right users can access the right territory model elements, records, and record elements.

Run Assignment Rules for a Territory

Run account assignment rules for any territory that has rules defined and belongs to a territory model in `Planning` or `Active` state. If your territory is in `Planning` state, running rules lets you *preview* account assignments. If your territory is in `Active` state when you run rules, accounts are assigned to territories according to your rules.

Find Out Which Territories an Assignment Rule Applies To

If you use rules to assign accounts to territories, it can be helpful to find out which territories a single rule applies to.

SEE ALSO:

Enterprise Territory Management Concepts

Enterprise Territory Management

Enable Enterprise Territory Management

Starting with Winter '15, Enterprise Territory Management is ready to be enabled by administrators in new Salesforce organizations.Organizations created before Winter '15 need to call salesforce.com to enable the feature. Enterprise Territory Management cannot be enabled in existing organizations that have Customizable Forecasting enabled.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

1. From Setup, enter *`Territories`* in the `Quick Find` box, then select **Settings**.
2. Click **Enable Enterprise Territory Management**.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Enterprise Territory Management:

- "Customize Application"

Define Enterprise Territory Management Settings

Define and configure settings for Enterprise Territory Management.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

IN THIS SECTION:

Define Default User Access for Territory Records

Specify the *default* settings for how users can access and modify records associated with the sales territories you set up. The access provided by default settings can be modified when you create or edit an individual territory.

Enable Filter-Based Opportunity Territory Assignment

Enable and configure filter-based assignment of territories to opportunities..

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up Enterprise Territory Management:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Define Default User Access for Territory Records

Specify the *default* settings for how users can access and modify records associated with the sales territories you set up. The access provided by default settings can be modified when you create or edit an individual territory.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

The standard record access settings apply to accounts and opportunities. If your organization uses `Private` default internal access for contacts or cases, you can also set access for those records.

1. From Setup, enter `Territories` in the `Quick Find` box, then select **Settings**.
2. Select the default access levels you want for accounts and opportunities.
3. If applicable, select the default access levels for contacts and cases.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create a territory model:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Enable Filter-Based Opportunity Territory Assignment

Enable and configure filter-based assignment of territories to opportunities..

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From Setup, enter `Territories` in the `Quick Find` box, then select **Settings**.
2. Enable Filter-Based Opportunity Territory Assignment.
3. If your organization is using the Apex code Salesforce provides, first create the class and then return to this Settings page and enter the class name: `OppTerrAssignDefaultLogicFilter`. If you opt to use your own code for the Apex class, you'll come back and enter the name of the class that you create.
4. If you want to run the filter-based opportunity territory assignment job when opportunities are created, select that option.
5. Save your settings.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Enterprise Territory Management:

- "Customize Application"

Use Chatter to Collaborate on Territory Models

Enable Chatter Feed Tracking on the Territory Model object to collaborate on model development directly within model records. Your team can post and respond to comments, attach files, and get notifications when model states change or key fields are updated.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

After you enable and configure Chatter Feed Tracking, anyone with access to a territory model record can use Chatter to collaborate on that model. Those who follow the record will get updates in their own Chatter feeds when tracked fields are updated.

1. Make sure Chatter has been enabled for your organization.
2. From Setup, enter `Feed Tracking` in the `Quick Find` box, then select **Feed Tracking**.
3. Select the Territory Model object. Enable Feed Tracking, then select the territory model fields you want to track.
4. Click **Save**.
   The Chatter feed appears at the top of your organization's territory model records.
5. Make sure to tell others who maintain territory models that they can now use Chatter to follow and collaborate on territory models directly from model records.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Chatter Field Tracking:

- "Customize Application"

To share a Chatter post on a territory model record:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Build a Territory Model

A territory model organizes all the elements of your organization's territory management plan, including a territory hierarchy, account assignments, and user assignments. Keep your model in the `planning` state as you build your hierarchy, define assignment rules for territories, add users to territories, and run your rules to see the resulting account assignments.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To build a territory model:
- "View Setup and Configuration"

  AND

  "Manage Territories"

IN THIS SECTION:

1. Create Territory Types

   Territory types help you categorize and define individual territories. Creating territory types is the first step in building your territory model in Salesforce.
2. Create a Territory Model Record

   The first step in building your territory model is creating the record that connects the other elements, including territories, user assignments, and account assignments. When you create a territory model record, Salesforce generates a territory hierarchy for it.
3. Create Territories

   Create territories as you build your organization's territory model. When you create a territory, it appears on the model's territory hierarchy.
4. Create and Preview Territory Account Assignments

   You assign accounts to territories by either creating rules that assign them automatically or adding them manually. Rules can be configured to apply to both parent territories and their descendents. Manual assignments apply only to the territory where they are made.

Create Territory Types

Territory types help you categorize and define individual territories. Creating territory types is the first step in building your territory model in Salesforce.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Examples of territory types you might create include *`Named Accounts`*, *`Direct Accounts`*, and *`Overlay Sales`*.

1. From Setup, enter *`Territory Types`* in the `Quick Find` box, then select **Territory Types**.
2. Click **New Territory Type**.
3. Enter a label and a description. In your description, make sure you clearly indicate what kinds of territories should belong to that type.
4. Specify a territory type priority.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create a territory type:
- "View Setup and Configuration"

  AND

  "Manage Territories"

5. Click **Save**.

SEE ALSO:

Territory Type Priority

Create a Territory Model Record

The first step in building your territory model is creating the record that connects the other elements, including territories, user assignments, and account assignments. When you create a territory model record, Salesforce generates a territory hierarchy for it.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Your organization's Salesforce edition determines the number of territory models you can create in production and sandbox orgs. This limit includes models created by cloning.

Edition	**Number of Models in Production Orgs**	**Number of Models in Sandbox Orgs**
Developer	4	4
Enterprise	2	2
Performance	4	4
Unlimited	4	4

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create a territory model record:

- "View Setup and Configuration"

  AND

  "Manage Territories"

1. From Setup, enter `Territory Models` in the `Quick Find` box, then select **Territory Models**.
2. Click **New Territory Model**.
3. Define the label and description fields.
4. Click **Save**.

Create Territories

Create territories as you build your organization's territory model. When you create a territory, it appears on the model's territory hierarchy.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

By default, each territory model can have up to 1,000 territories.

1. Open the territory model where you want to create the territory.
2. If you need to, select **Tree View** from the drop-down to show the model's territory hierarchy, including any existing territories.
3. To create a top-level territory, hover over the territory model name and click **Create Territory**. To create a child territory from an existing territory, hover over the territory name and click **Create Territory**.
4. On the New Territory page, define the territory: give it a meaningful label, choose its territory type. If the territory requires *different* user access for accounts and opportunities than the *default* user access for those records, define the territory's user access levels.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create territories:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Create and Preview Territory Account Assignments

You assign accounts to territories by either creating rules that assign them automatically or adding them manually. Rules can be configured to apply to both parent territories and their descendents. Manual assignments apply only to the territory where they are made.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Before you commit to your model's account assignments, you should preview them by running assignment rules and related reports while the model is in `Planning` state. When you're satisfied with your planned account assignments, change the model to `Active` state. Then, run assignment rules again so that your territories include affected accounts that were created or updated during the activation process.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Use Rules to Assign Accounts to Territories

Create and run rules that automatically assign new or edited accounts to territories. A rule identifies one or more characteristics you use to define that territory, and tells Enterprise Territory Management to assign accounts with those characteristics to that territory automatically. If your territory is in `Planning` state, running rules lets you *preview* account assignments. If your territory is in `Active` state when you run rules, accounts are assigned to territories according to your rules.

Manually Assign Accounts to a Territory

Accounts that are not assigned to territories by rules can be assigned manually to more or more territories, one territory at a time. Manual assignment is useful for accounts that have unique characteristics and therefore can't be assigned by rules.

Preview Territory Account Assignments

Before you activate a territory model, you should preview and validate its territory account assignments. Preview assignments by running assignment rules when the model is in `Planning` state. Also verify your manual assignments.

Identify Users in Territories Assigned to an Account

Accounts and users are assigned to territories independently, but when an account is assigned to a territory, that territory's users have access to the account. It's easy to find out who those users are by looking at the account record.

Use Rules to Assign Accounts to Territories

Create and run rules that automatically assign new or edited accounts to territories. A rule identifies one or more characteristics you use to define that territory, and tells Enterprise Territory Management to assign accounts with those characteristics to that territory automatically. If your territory is in `Planning` state, running rules lets you *preview* account assignments. If your territory is in `Active` state when you run rules, accounts are assigned to territories according to your rules.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create rules within your territories:

- "Customize Application"
  "Manage Territories"

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Tip: It's a best practice *not* to assign a rule to a territory if that rule is a child of another rule *already assigned* to the territory. To find out what rules apply to a territory, just open the territory's record detail page and look at the Assignment Rules Assigned to this Territory related list. If a rule has `Apply to Child Territories` selected, do not assign the rule separately to child territories.

1. From the territory model hierarchy, open the territory where you want to create a rule.
2. On the detail page, in the Assignment Rules Defined in this Territory related list, click **New**.
3. On the rule edit page, enter a name for the new rule and define selection criteria.
4. If you want the rule to also apply to the current territory's descendents, select the **Apply to child territories** checkbox.
5. If you want the rule to run automatically whenever a user creates or edits an account, select the **Active** checkbox.
6. Click **Save** to save the rule and return to the territory detail page.
7. (Optional) In the Assignment Rules Defined in This Territory related list, click **Run Rules**.
   You'll receive an email when the process is complete.

Example: Rules can work together within and across territories and child territories. For example, you create a territory called Western States, with child territories Washington, Oregon, and California. From the Western States territory record, you create a rule that assigns accounts in Washington, Oregon, and California to that territory. You apply that rule to child territories and then, from the California territory record, you create a rule that assigns accounts in far northern California to the Oregon territory.

SEE ALSO:

Activating Assignment Rules and Applying them to Descendant Territories

Manually Assign Accounts to a Territory

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign accounts manually within your territories:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Accounts that are not assigned to territories by rules can be assigned manually to more or more territories, one territory at a time. Manual assignment is useful for accounts that have unique characteristics and therefore can't be assigned by rules.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From the territory model hierarchy, open the territory where you want to assign one or more accounts.
2. On the territory's detail page, in the Manually Assigned Accounts related list, click **Add Accounts** to see a list of your organization's accounts. Adjust the list view if you need to.
3. In the `Available` related list, select the checkbox for each account you want to assign. If you need to view more records, click **More** beneath the list.
   Each selected account appears in the Selected related list.
4. Click **Assign**.

Preview Territory Account Assignments

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To preview territory model account assignments:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Before you activate a territory model, you should preview and validate its territory account assignments. Preview assignments by running assignment rules when the model is in `Planning` state. Also verify your manual assignments.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Important: To protect data quality, you cannot modify a territory until you receive the email confirming that the rules have been run successfully. If rules do not run successfully, follow instructions provided in the email for troubleshooting specific issues.

1. Open the record for the territory model whose assigned accounts you want to preview and click **View Hierarchy**.
2. Verify that the model is in `Planning` state.
3. Click **Run All Rules**.
   When rules are finished running, we'll send an email to let you know. Processing may take some time, depending on the size and complexity of your organization.
4. From the territory model hierarchy, open each territory and descendent affected assignment rules. Also open territories that have manual account assignments.
5. On the territory detail page, click **View Accounts** to see assigned accounts. The `Method` column indicates how each account was assigned: by a rule or manually.

Note: If you make changes to the rules for a territory, you must run rules again to view those changes. In this case, you may want to run rules on that territory only. To do so, navigate to the territory's detail page, scroll to the Assignment Rules Defined in this Territory related list, and click **Run Rules**.

Identify Users in Territories Assigned to an Account

Accounts and users are assigned to territories independently, but when an account is assigned to a territory, that territory's users have access to the account. It's easy to find out who those users are by looking at the account record.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Open the account record that has territories assigned.
2. Identify the users from the Users in Assigned Territories related list.

   Note: The `Modified Date` field in this related list tells the last time the user territory association record was modified. It may or may not indicate when the user was assigned to the territory.

Example: Six sales reps are assigned to the East Coast territory. Because XYZ Publishing is also assigned to the East Coast territory, the six sales reps in the territory appear in the Users in Assigned Territories related list on the XYZ Publishing account record.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view users in territories from `Active`, `Planning`, or `Archived` territory models that are assigned to an account:

- "View Setup and Configuration"

  AND

  "Manage Territories"

To view users in territories in the `Active` territory model that are assigned to an account:

- "View Setup and Configuration"

Manually Assign One or More Territories to an Account

Assign one or more territories to an account directly from the account record. Only territories that belong to models in `Planning` or `Active` state can be assigned to accounts.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Open the account you want to assign territories to.
2. On the account’s detail page, in the Assigned Territories related list, click **Assign Territories** to see a list of your organization’s territories. Adjust the list view if you need to.
3. Select the territory model that contains the territories you want to associate.
4. In the `Available` related list, select the checkbox for each territory you want to assign. If you need to view more records, click **More** beneath the list.
   Each selected territory appears in the Selected related list.
5. Click **Assign**.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign territories manually within your accounts:

- “View Setup and Configuration”

  AND

  “Manage Territories”

To view territories from `Active`, `Planning`, or `Archived` territory models that are assigned to an account:

- “View Setup and Configuration”

  AND

  “Manage Territories”

To view territories assigned from the `Active` territory model that are assigned to an account:

- “View Setup and Configuration”

Manually Assign One or More Assignment Rules to a Territory

Assign one or more object assignment rules to a territory directly from the territory record. Available rules come from the territory model the territory belongs to.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Territories can have up to 15 assignment rules each.

1. Open the territory you want to assign rules to.
2. On the territory's detail page, in the **Assignment Rules Assigned to This Territory** related list, click **Assign Rules** to see a list of rules available in the model.
3. In the `Available` related list, hover over the names of available rules to view the details of their criteria. Select the checkbox for each rule you want to assign to the territory. If you need to view more rules, click **More** beneath the list.
   Each selected rule appears in the Selected related list.
4. Apply selected rules to child territories as appropriate.
5. Click **Assign**.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign rules to a territory:
- "View Setup and Configuration"

  AND

  "Manage Territories"

Manually Assign a Territory to an Opportunity

On an opportunity record, you can assign and track the territory whose assigned sales reps work that opportunity. Manual territory assignments are controlled by your sharing access to the opportunity's assigned (parent) account. When you assign a territory to an opportunity, that opportunity is shared with all Salesforce users assigned to that territory's parent in the territory model's hierarchy.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Users who *have* sharing access to the opportunity's account can assign *any* territory from the active model to the opportunity. Those who *do not* can assign *only* a territory that is *also* assigned to the opportunity's account. For manual territory assignments, Salesforce suggests opportunities assigned to the territory's account, but those with sharing access can search for and assign any territory in the active territory model.

1. Open the opportunity record.
2. In the `Territory` field, specify the territory you want to assign.
3. Save the opportunity record.

Example: The Utel.com account has six opportunities and two territories (East Coast and West Coast). They can assign East Coast, West Coast, or any other territory within the active model to any or all of those six opportunities. One of their sales reps has sharing access to the account assigned to one of the opportunities, so she can assign any territory to that opportunity. For the other five opportunities, she does not have sharing access to assigned accounts, for each of those, she can only assign a territory that is already assigned to the opportunity's assigned account.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manually assign territories to opportunities:
- "View Setup and Configuration"

  AND

  "Manage Territories"

Run the Opportunity Territory Assignment Filter

The opportunity territory assignment filter automatically assigns territories to opportunities based on the filter logic in the Apex class.

1. View the active territory model's hierarchy.
2. Click **Run Opportunity Filter** to initiate the job that applies the filter. Select options for which opportunities to include . Show more options to enter a date range.
3. Click **Run Opportunity Filter**.
   You'll receive an email when the job is complete.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To run the opportunity territory assignment filter:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Clone a Territory Model

Cloning lets you make a copy of a territory model that you can use to test out different territory characteristics. The new model includes the original's territories, assignment rules, users, and manually assigned accounts. Only models in `Planning`, `Active`, or `Archived` state can be cloned. When cloning is complete, the new model is in `Planning` state.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

After the cloning process is complete, the new territory model it creates is in `Planning` state.

1. Open the territory model you want to clone.
2. Click **Clone**.
3. Define the label and description fields.
4. Click **Save**.
   The model state changes to `Cloning` while Salesforce processes your request. Cloning may take some time, depending on the size and complexity of your model. When the process is complete, we'll send you an email to let you know

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To clone a territory model:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Assign Users to Territories

Assign users to the territories they will operate in to sell products and services. You can assign users to territories that belong to models in `Active` or `Planning` state, though assignments made within `Planning` state models are for planning purposes only: they *do not* affect user access to records.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From the territory model hierarchy, open the territory where you want to assign users.
2. On the territory's detail page, in the Assigned Users related list, click **Manage Users**.
3. On the Assign Users page, select or search for the user you want to add.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign users to territories:

- "View Setup and Configuration"

  AND

  "Manage Territories"

Identify Territory Users by Territory Role

Keep track of user functions within territories by creating territory roles and assigning them to territory users as needed. Users can even have different roles in different territories.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Example: For example, you might create roles like Territory Owner, Sales Manager, Product Specialist, or Sales Representative.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

IN THIS SECTION:

Define a Picklist for Territory User Roles

Add territory roles to the UserTerritoryAssociation object's `Role in Territory` picklist so you can select roles for territory users. The Role in Territory picklist you define can be used for all territories in `Active` or `Planning` state.

Assign Territory Roles to Users

Assign territory roles to identify the roles of users within territories.

Define a Picklist for Territory User Roles

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To define picklists:

- "Customize Application"

Add territory roles to the UserTerritoryAssociation object's `Role in Territory` picklist so you can select roles for territory users. The Role in Territory picklist you define can be used for all territories in `Active` or `Planning` state.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From the object management settings for user territory associations, go to the fields area.
2. Click **Role in Territory**, and then click **New**.
3. Enter the picklist values you want and click **Save**.
   The values you entered are now available for selection from the `Role in Territory` picklist on the territory's Users Assigned edit page.

Assign Territory Roles to Users

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign territory roles to users:

- View Setup and Configuration

  AND

  "Manage Territories"

Assign territory roles to identify the roles of users within territories.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure you have created a Role in Territory picklist so you have some roles to select for users.
2. Open the record of the territory where you want to assign territory roles.
3. In the Assigned Users list, click **Edit** next to the name of a user to whom you're assigning a territory role.
4. From the `Role in Territory` picklist, select the user's territory role.
5. Click **Save**.

Activate a Territory Model

When you're satisfied with the structure of your territory model and its territory account assignments, you're ready to activate it. Remember that you can also maintain models in `Planning` and `Archived` states for further modeling and reference.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Important: Only one model can be in the `Active` state at one time in your organization, and you can only activate a model that is in the `Planning` state. After activating a model, you cannot reset it to `Planning` state: you can only set it to `Archived` state.

1. If you need to, preview account assignments before activating the model.
2. Open the record for the territory model you want to activate and click **View Hierarchy**.
3. Click **Activate**.
   The model state changes to `Activating` while Salesforce processes your request. Activation may take some time, depending on the size and complexity of your model. When the process is complete, we'll send you an email to let you know.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To activate a territory model:
- "View Setup and Configuration"

  AND

  "Manage Territories"

SEE ALSO:

Territory Model State

Configure Enterprise Territory Management Permissions and Access for Administrators and Users

An important step in implementing Enterprise Territory Management is making sure the right users can access the right territory model elements, records, and record elements.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure you understand how permissions affect territory model and record access in Enterprise Territory Management.
2. Assign user permissions as needed.
3. Add the Assigned Territories related list to your account page layouts. This list lets administrators manually assign territories to accounts and it lets users can identify which territories are assigned to their accounts. Make sure the related list includes the standard and custom fields (if any) that administrators and users need to view.
4. Add the Users in Assigned Territories related list to your account page layouts. This list lets administrators and users see all users assigned to the territories that are assigned to an account, according to their permissions. Make sure the related list includes the standard and custom fields (if any) that administrators and users need to view.
5. Add the `Territory` field to your Opportunity page layouts. This field lets administrators and sales managers manually assign a territory to an opportunity from a list of the territories assigned to the opportunity's account. Add the `Territory Name` and `Territory Description` fields to Opportunity list views and reports so that users can identify assigned territories there.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign user permissions:
- "Manage Users"

To create, edit, and delete page layouts:
- "Customize Application"

6. Add any custom buttons, links, or actions you've created to territory page layouts.

SEE ALSO:

How do Permissions Affect Feature and Data Access in Enterprise Territory Management?

Run Assignment Rules for a Territory

Run account assignment rules for any territory that has rules defined and belongs to a territory model in `Planning` or `Active` state. If your territory is in `Planning` state, running rules lets you *preview* account assignments. If your territory is in `Active` state when you run rules, accounts are assigned to territories according to your rules.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Open the hierarchy for the territory model the territory model belongs to.
2. In the tree view or list view, find the territory you want to run rules for.
3. In list view, click **Run Rules**. In tree view, hover over the territory name and then click **Run Rules**. If you want to view the territory record's details, including its assigned rules, *before* you run its rules, open the record and then click the **Run Rules** button in the Assignment Rules Assigned to This Territory related list.

USER PERMISSIONS

To run rules within your territories:

- "Customize Application"

  AND

  "Manage Territories"

Find Out Which Territories an Assignment Rule Applies To

If you use rules to assign accounts to territories, it can be helpful to find out which territories a single rule applies to.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From Setup, enter *`Territory Models`* in the `Quick Find` box, then select **Territory Models** to view a list of your organization's territory models.
2. Find the model in which the rule operates and click **View Rules** to see a list of all the rules associated to the model and its territories.
3. Click the rule name and look for the territories it applies to in the Assigned Territories related list.

EDITIONS

Available in: Salesforce Classic

Available in:

USER PERMISSIONS

To view assignment rule details:

- "Customize Application"

  AND

  "Manage Territories"

Create Custom Report Types for Enterprise Territory Management Reports

Organizations using Enterprise Territory Management can run reports that show account assignments, user assignments, and more. Set up custom report types so sales managers and other users can create the reports they need.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure you're familiar with custom report types and the general steps for creating and maintaining them.
2. Create custom report types relating these objects and configuring them as necessary. Make all fields available for reporting. Add each report to the Territory Management report type category. Provide a clear name and description for each report type so users who create reports can understand which one to use for their needs.

Report (Topics for selected reports are linked)	A (Primary Object)	B	C
Accounts assigned to territories	Accounts	Territories Select **"A" records must have related "B" records**.	–
Accounts not assigned to territories	Accounts	Territories Select **"A" records may or may not have related "B" records**.	–
Territories with assigned accounts	Territory Models	Territories	Territory-Assigned Records Select **"B" records must have related "C" records**.
Territories without assigned accounts	Territory Models	Territories	Territory-Assigned Records Select **"B" records may or may not have related "C" records**.
Users assigned to territories	Users	Territories Select **"A" records must have related "B" records**.	–

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or update custom report types:
- "Manage Custom Report Types"

To delete custom report types:
- "Modify All Data"

Report (Topics for selected reports are linked)	A (Primary Object)	B	C
Users not assigned to territories	Users	Territories Select **"A" records may or may not have related "B" records**.	–
Territories with assigned users	Territory Models	Territories	Users Select **"B" records must have related "C" records**.
Territories without assigned users	Territory Models	Territories	Users Select **"B" records may or may not have related "C" records**.
Summarizable account information by territory	Accounts	Territories Select **Each "A" record must have at least one related "B" record**.	–

3. Deploy the report types you want to make available to users.
4. Let users know that they can create reports using these custom report types.

Report on Accounts Assigned to Territories

Manage account assignments to sales territories by reporting on which accounts have been assigned to territories. See which accounts belong to which territories.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Accounts and Territories objects. It should specify that the Accounts object *must* have related Territory records and it should make all fields on these objects available for reporting.
2. Create your report: click the Reports tab, then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report.
4. Click **Create**.
5. Make sure that the Accounts field `Account Name` and the Territories field `Label` appear on the report. If they do not, add them.
6. (Optional) Filter the report results. To show data from territory models in `Active` state *only*, from the `Filters` drop-down list, select `Field Filter`. Configure the filter options to show `Territory Model: Label equals <name of active territory model>` and then click **OK**. From the **Show** field, to filter by account ownership, select `My accounts`, `My team's accounts`, or `My territory teams' accounts`. To filter by user territory assignment, select `My territories' accounts`.

   Important: If you later activate a different territory model, make sure you update the territory model name variable in this report.

7. Add any other fields you find useful for this report.
8. Save the report and run it.
9. (Optional) Summarize information by Accounts field `Account Name` to show each account along with the number of territories it's assigned to.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To run reports:
- "Run Reports"

To schedule reports:
- "Schedule Reports"

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

Report on Territories Without Assigned Accounts

Manage account assignments to sales territories by reporting on which territory models' territories do not have assigned accounts.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Territory Models, Territories, and Territory-Assigned Records objects. It should specify that the Territories object *may or may not* have related Territory-Assigned records and should make all fields on these objects available for reporting.
2. Create your report: click the Reports tab, then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report.
4. Click **Create**.
5. Make sure that the Territory Models field `Label` and the Territories field `Label` appear on the report. If they do not, add them.
6. From the `Filters` drop-down list, select `Cross Filter`. Configure the filter options to show `Territories without Territory-Assigned Records` and then click **OK**. Configure the filter options to show `Object equals Account`.
7. If you want to show data from territory models in `Active` state *only*, from the `Filters` drop-down list, select `Field Filter`. Configure the filter options to show `State equals Active` and then click **OK**.
8. Add any other fields you find useful for this report.
9. Save the report and run it.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To run reports:
- "Run Reports"

To schedule reports:
- "Schedule Reports"

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

Report on Users Not Assigned to Territories

Manage user assignments to sales territories by reporting on which users have not been assigned to territories.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Users and Territories objects. It should specify that the Users object *may or may not* have related Territories records and should make all fields on these objects available for reporting.
2. Create your report: click the Reports tab, then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report.
4. Click **Create**.
5. Make sure that the Users field `Full Name` and the Territories field `Label` appear on the report. If they do not, add them.
6. From the `Filters` drop-down list, select `Cross Filter`. Configure the filter options to show `Users without Territories` and then click **OK**.
7. If you want to show data from territory models in `Active` state *only*, from the `Filters` drop-down list, select `Field Filter`. Configure the filter options to show `Territory Model: Label equals <name of active territory model>` and then click **OK**.

   Important: If you later activate a different territory model, make sure you update the territory model name variable in this report.

8. Add any other fields you find useful for this report.
9. Save the report and run it.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To run reports:
- "Run Reports"

To schedule reports:
- "Schedule Reports"

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

Report on Territories With Assigned Users

Manage user assignments to sales territories finding out which territory models' territories have users assigned. See which assigned users belong to which territories.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Territory Models, Territories, and Users objects. It should specify that the Territory object *must* have related Users records and make all fields on these objects available for reporting.
2. Create your report: click the Reports tab, then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report.
4. Click **Create**.
5. Make sure that the Territory Models field `Label`, the Territories field `Label` , and the Users field `Full Name` appear on the report. If they do not, add them.
6. If you want to show data from territory models in `Active` state *only*, from the `Filters` drop-down list, select `Field Filter`. Configure the filter options to show `State equals Active` and then click **OK**.
7. Add any other fields you find useful for this report.
8. Save the report and run it.
9. (Optional) Summarize information by Territory object field `Label` to show each territory with the users assigned to it.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To run reports:
- "Run Reports"

To schedule reports:
- "Schedule Reports"

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

Report on Summarizable Account Fields by Territory

Gauge territory size by reporting on summarizable account data, such as annual revenue or number of employees.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Accounts and Territories objects. It should specify that the Accounts object *must have* at least one Territory object record and should make all fields on these objects available for reporting.
2. Create your report: click the Reports tab, then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report.
4. Click **Create**.
5. Select `Matrix Format` for the report.
6. From the Territories field list, select the `Label` field. Drag it to create a row grouping.
7. From the Accounts field list, select the `Account Name` field. Drag it to create a row grouping.
8. From the Accounts field list, select summarizable fields, such as `Annual Revenue` and `Employees`, to show those totals. Drag them into the summarizable fields area. When prompted, select the `Sum` checkbox.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To run reports:
- "Run Reports"

To schedule reports:
- "Schedule Reports"

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

9. (Optional) Filter the report results. From the **Show** field, to filter by account ownership, select `My accounts`, `My team’s accounts`, or `My territory teams’ accounts`. To filter by user territory assignment, select `My territories’ accounts`.
10. Add any other fields you find useful for this report.
11. Run the report and make sure it shows the data and the arrangement you want.
12. Summarize information by the Territories field `Label` to total all the summarizable field values by territory.
13. Save the report.

Archive a Territory Model

Archiving a territory model deactivates it in your organization, but the model remains in your territory model list, where you can reference its associated assignment rules and the resulting account-to-territory assignments generated by the rules. You can only archive a model that is in the `Active` state. After archiving a model, you cannot return it to the `Active` state or the `Planning` state.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From Setup, enter `Territory Models` in the `Quick Find` box, then select **Territory Models**.
2. Click **Edit** next to the territory model you want to archive.
3. Choose **Archiving** from the `State` drop-down.
   The model state changes to `Archiving` while Salesforce processes your request. When processing is complete, the model state changes to `Archived`, and you receive a confirmation via email. This may take some time, depending on the size and complexity of your organization.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To archive a territory model:
- “Manage Territories”

Delete a Territory Model

Delete a territory model if your organization no longer actively uses the model for territory management or reference. You can’t delete an active territory: the model must be in `Planning` or `Archived` state.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Deleting a territory model also deletes all its associated territories and account assignments. You can’t cancel the process or restore a deleted model. The process may take several hours, so we’ll send you an email when it’s complete.

1. From Setup, enter `Territory Models` in the `Quick Find` box, then select **Territory Models**.
2. Find the model in the list. Check the value in the **State** column to make sure the model is in the `Planning` or `Archived` state.
3. Click **Del**.
4. Later, check your email for confirmation that the deletion process is complete.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To delete a territory model:
- “Manage Territories”

View and Manage Assignment Rules at the Territory Model Level

If you want to view and manage account assignment rules at a high level, you can. Start from the territory model record to create, edit, or view rules for the model's territories. From the model-level list of rules, you can view rule criteria, or open a rule record to find out which territories it's assigned to, if any.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or manage territory rules:

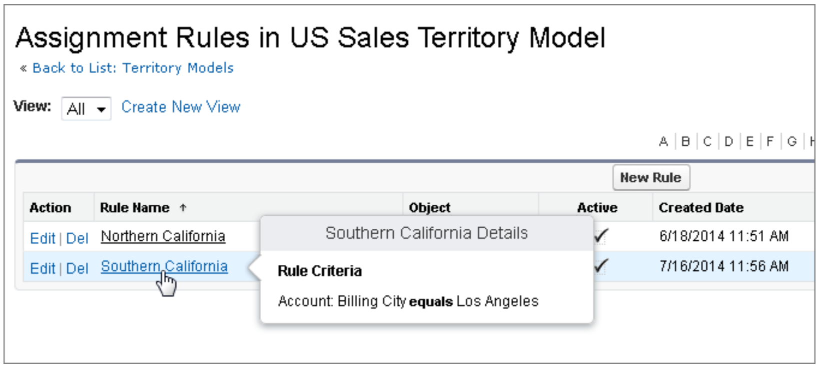
- "View Setup and Configuration"

  AND

  "Manage Territories"

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From Setup, enter `Territory Models` in the `Quick Find` box, then select **Territory Models**.
2. Click **View Rules** next to the territory model whose rules you want to manage.
3. On the Assignment Rules list view, you can create a new rule, open a rule record for complete details, or hover over the rule name to view its criteria.



Assignment Rules in US Sales Territory Model

« Back to List: Territory Models

View: All ▾ Create New View

A | B | C | D | E | F | G | H

New Rule

Action	Rule Name ↑	Object	Active	Created Date
Edit | Del	Northern California		✓	6/18/2014 11:51 AM
Edit | Del	Southern California		✓	7/16/2014 11:56 AM

Southern California Details

Rule Criteria

Account: Billing City **equals** Los Angeles

SEE ALSO:

Find Out Which Territories an Assignment Rule Applies To

Activating Assignment Rules and Applying them to Descendant Territories

The ability to apply an assignment rule to descendant territories is available at the territory level only. You cannot apply assignment rules to descendants at the territory model level. Therefore, you only get the option to apply a rule to descendant territories if you access the rule's record from an individual territory.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

With this restriction in mind, make sure you create or edit a rule record from the appropriate place. Starting from the territory record gives you the most options. Make sure you activate all assignment rules you want to use: inactive rules *do not* affect assignments for associated territories or any descendant territories they have been applied to.

Example: For example, you have a territory model called US, and its hierarchy has two territories: Eastern States and Western States. The Eastern States territory has an assigned rule called Eastern States Accounts. If you open the record for the territory model, US, then click `View Rules` and from there click **Edit** to edit the Eastern States Accounts rule record, the final step lets you activate the rule.

If you start from the Eastern States territory record, then click **Edit** next to the Eastern States Accounts rule record, in addition to the step where you activate or deactivate the rule, you'll see an additional step that lets you apply the rule to the Eastern States territory's descendants.

Disable Enterprise Territory Management

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To disable Enterprise Territory Management:
- "Customize Application"

If you wish, you can disable Enterprise Territory Management for your organization and use another means of record sharing.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Important: If you disable Enterprise Territory Management, your users lose record access that's based on territory assignments, and your organization no longer has access to territory management data. If you re-enable Enterprise Territory Management, you may lose data that had previously been available through the feature.

1. If you haven't already, archive your active territory model before disablingEnterprise Territory Management.
2. From Setup, enter `Territories` in the `Quick Find` box, then select **Settings**.
3. Click **Disable Territory Management 2.0**.

Customizing Territories to Help Your Users Manage Accounts

Enable Territory Management

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable territory management:
- "Manage Territories"

Before you enable Territory Management, contact Salesforce, and then check that your organization meets the prerequisites.

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Territory management is not enabled by default in Salesforce. To request territory management for your organization, contact Salesforce.

Note: Original Territory Management is available only with Customizable Forecasts and is not supported with Collaborative Forecasts. If original Territory Management is enabled, you can no longer use Collaborative Forecasts. The newer Enterprise Territory Management can't be used with Customizable Forecasts. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

Ensure that you meet the following prerequisites before enabling territory management:

- To enable territory management, your organization must be using customizable forecasting. If you do not know whether you have customizable forecasting, see Do I Have Customizable Forecasting?.

After you have completed the prerequisites, you will be ready to turn on territory management for your organization:

1. In Salesforce, from Setup, enter `Territory` in the `Quick Find` box, then select **Territory Settings**.

2. Optionally, change the organization-wide territory management settings that are configurable from the Territory Settings page. See Configuring Territory Management Settings on page 152.
3. There are two different options for enabling territory management, which depend on your preference to retain or purge pre-existing forecast data. Click either **Enable Territory Management** or **Enable Territory Management from Scratch**.

   What the Enable Territory Management Button Does

   When you click this button, your organization's current forecast hierarchy and forecast data are automatically copied to the territory hierarchy as follows:

   - The name of your organization is set as the top of the territory hierarchy.
   - For each role in the forecast hierarchy, a corresponding territory is created in the new territory hierarchy.
   - Manual forecast sharing settings on the roles are copied to the new territory. For more information on manual forecast sharing, see Manually Sharing a Forecast on page 269.
   - Active Salesforce users are added to territories based on their roles.
   - Opportunities are assigned to the opportunity owner's territory.
   - Accounts are not assigned anywhere in the territory hierarchy.
   - Until you add or edit territories, your forecasts work the same as they did before you enabled territory management.

   What the Enable Territory Management from Scratch Button Does

   When you click this button, the following occurs:

   - All pre-existing forecast data is deleted.
   - An empty territory hierarchy is created.

   Using this button is only recommended when you are setting up a brand new organization in Salesforce that does not have an existing forecast hierarchy.

   Warning: ***Irreversible data loss*** can result from clicking **Enable Territory Management from Scratch**.

4. Configure territory-related fields, page layouts, and user permissions:
   - From the object management settings for accounts, go to Page Layouts and add the `Territories` and `Exclude from territory assignment rules` fields to account page layouts. For each account page layout, you can set whether users can choose to run account assignment rules when they save accounts. You can also set whether account assignment rules run by default whenever accounts are saved.:
   - From the object management settings for opportunities, go to Page Layouts and add the `Territory` field to opportunity page layouts.
   - To allow a user to be an administrator of the territory hierarchy, grant them the "Manage Territories" permission using permission sets or profiles. Users that had the "Customize Application" permission before you enabled territory management are automatically given the "Manage Territories" permission.
5. To begin working with your new territory hierarchy, from Setup, enter *`Hierarchy`* in the `Quick Find` box, then select **Territory Hierarchy**. See Building Your Territory Hierarchy on page 153.

SEE ALSO:

Configuring Territory Management Settings

Configuring Territory Management Settings

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

You can set default account, contact, opportunity, and case access levels for new territories, as well as whether forecast managers can administer the territories located below them in the territory hierarchy.

1. From Setup, enter `Territory` in the `Quick Find` box, then select **Territory Settings**.
2. Choose default access levels for accounts, contacts (depending on your organization-wide default setting), opportunities, and cases. These are the access levels that will be selected by default when a new territory is created. For descriptions of these fields, see Territory Fields on page 156.

   Note: These settings are not retroactive and do not affect territories that already exist.

   When creating or editing an individual territory, you can override these default access levels. See Creating Territories on page 155.

3. Optionally, check `Forecast managers can manage territories`. When this box is checked, forecast managers can administer subordinate territories: they can manage users, manually add accounts, and manage account assignment rules for territories that are below their immediate territory. Also, they can add child territories to both their immediate territory and lower territories. To learn more about forecast managers, see Assigning Forecast Managers in Your Forecast Hierarchy on page 267.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To configure territory settings:
- "Manage Territories"

SEE ALSO:

Enable Territory Management

Display and Edit Territories

Building Your Territory Hierarchy

Building Your Territory Hierarchy

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Note: If you clicked the **Enable Territory Management** button to enable territory management, your existing forecast hierarchy was used as the basis of the territory hierarchy.

To work with your organization's territory hierarchy, from Setup, enter *`Hierarchy`* in the `Quick Find` box, then select **Territory Hierarchy**. The following terms are used when referring to territories in the hierarchy.

Parent Territory

A territory that is located immediately above another territory in the hierarchy. A territory has exactly one parent territory in the hierarchy, except for the top-level territory which does not have a parent.

Child Territory

A territory that is immediately below another territory in the hierarchy. A parent territory can have an unlimited number of child territories.

Sibling Territory

Child territories that share the same parent territory.

Choose an option from the drop-down list to change how the territory hierarchy is displayed:

Show in tree view

See a visual representation of the parent-child relationships between your territories. Click **Expand All** to see all territories, or **Collapse All** to see only top-level territories. To expand or collapse an individual node, click the plus (+) or minus (-) icon.

Show in sorted list view

See a territory list that you can sort alphabetically by territory name, parent territory (**Reports to**), or description.

To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views.To edit or delete any view you created, select it from the `View` drop-down list and click **Edit**.

Show in list view

See a list of territories and their children, grouped alphabetically by the name of the top-level territory. The columns are not sortable. This view is not available for hierarchies with more than 1,000 territories.

Each view provides links for you to create, edit, and delete territories.

SEE ALSO:

Display and Edit Territories

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view territories:
- "View Setup and Configuration"

To edit territories:
- "Manage Territories"

  OR

  You are a forecast manager. Forecast managers can manage territories of those users working below them in territory hierarchy.

Display and Edit Territories

From the territory detail page, you can view and modify different aspects of the territory, including related territories, assigned users, and included accounts.

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view territories:
- "View Setup and Configuration"

To edit territories:
- "Manage Territories"

  OR

  You are a forecast manager. Forecast managers can manage territories of those users working below them in territory hierarchy.

Displaying Territories

1. From Setup, enter *`Hierarchy`* in the `Quick Find` box, then select **Territory Hierarchy**.
2. Select the name of the territory you want to view.

Viewing Related Territories

The `Hierarchy` list at the top of the territory detail page shows how this territory is related to the top-level territory in the territory hierarchy. To see the names of other territories that share parent territory of this one, refer to the `Siblings` list. In either list, you can click a territory name to view that territory. The territory detail page also includes a Child Territories related list; see Working with Territory Related Lists on page 154.

Editing Territories

To update an existing territory, click **Edit**, and then change the fields you want to modify. For more information, see Territory Fields on page 156 and Create Custom Territory Fields on page 157.

If an edit to a territory affects a large amount of data, you receive a confirmation email when the operation has completed.

Note: When you edit groups, roles, and territories, sharing rules are automatically recalculated to add or remove access as needed.

Cloning Territories

Click **Clone** to create a territory with the same standard and custom field values as the current territory. The cloned territory has the same parent territory as the original territory. However, assigned users, account assignment rules, and manually assigned accounts are not cloned.

Note: If you have read-only access to a field, the value of that field is not carried over to the cloned record.

Viewing Accounts Assigned to a Territory

Click **View Accounts** to see a list of the accounts that have been assigned to this territory and territories below it in the territory hierarchy. The list includes both manually assigned accounts and accounts that were assigned via rules.

Working with Territory Related Lists

Each territory detail page has the following related lists:

- **Assigned Users** - Lists the users in the territory. See Managing Users in Territories on page 158.
- **Inherited Account Assignment Rules** - Lists the account assignment rules for this territory that are defined in a parent territory. See Managing Account Assignment Rules on page 162.

- **Account Assignment Rules Defined in This Territory** - Lists the account assignment rules for this territory. See Managing Account Assignment Rules on page 162.
- **Manually Assigned Accounts** - Lists the accounts that have been manually added to this territory. See Manually Assigning Accounts to Territories on page 169.
- **Child Territories** - Lists the territories located immediately below this territory in the territory hierarchy. To create a child territory for this territory, click **Add Territory**. To view a child territory's detail page, click the territory name.

SEE ALSO:

Building Your Territory Hierarchy

Enable Territory Management

Adding Forecast Managers to Territories

Creating Territories

Creating Territories

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

You can create up to 500 territories for your organization. To create a new territory:

1. From Setup, enter *`Hierarchy`* in the `Quick Find` box, then select **Territory Hierarchy**.
2. Click **Add Territory**. You can also click **Add Territory** from the Child Territories related list of a territory detail page.
3. Define the new territory by entering or changing fields. For descriptions of territory fields, see Territory Fields on page 156.

   The required standard fields for territories are `Label`, `Territory Name`, and `Parent Territory`. Territories can also have custom fields. For more information, see Create Custom Territory Fields on page 157.
4. Click **Save** to finish or **Save & New** to create more territories.

SEE ALSO:

Territory Fields

Create Custom Territory Fields

Building Your Territory Hierarchy

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create territories:

- "Manage Territories"

  OR

  You are a forecast manager. Forecast managers can manage territories of those users working below them in territory hierarchy.

Territory Fields

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

A territory has the following fields, listed in alphabetical order.

Field Name	Description
`Account Access`	Sets how much access territory members have to the territory's accounts: view only, view and edit, or view, edit, transfer and delete.
`Case Access`	Sets how much access territory members have to cases on the territory's accounts, regardless of who owns the cases: no access, view only, or view and edit.
`Confine Opportunity Assignment`	Select this checkbox to prevent the opportunities in this territory from being moved out of this territory and its child territories when account assignment rules are run.
`Contact Access`	Sets the level of access territory members have to contacts on the territory's accounts, regardless of who owns the contacts. The options are no access, view only, or view and edit.
`Forecast Manager`	The user to whom forecasts from child and lower-level territories roll up. Only modifiable by clicking **Change** on the territory detail page. If enabled via the Territory Settings page, a forecast manager can administer lower territories in the hierarchy.
`Label`	The name used to refer to the territory in any user interface pages.
`Opportunity Access`	Sets how much access territory members have to opportunities on the territory's accounts, regardless of who owns the opportunities: no access, view only, or view and edit.
`Parent Territory`	Territory immediately above this territory in the territory hierarchy. The parent territory must be an existing territory. Use the lookup icon to select the parent territory.
`Sharing Groups`	Read-only and only displays on the territory detail page. For every territory, two sharing groups are created; one for the territory, and another for the territory and its children. Click **Territory** to see the users who are in the sharing

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit territories:
- "Manage Territories"

  OR

  You are a forecast manager. Forecast managers can manage territories of those users working below them in territory hierarchy.

Field Name	Description
	group for a territory. Click **Territory and Subordinates** to see the users who are in the sharing group for a territory and its children. Note: Users are listed as group members only when the group is used in sharing rules or manual record sharing.
`Territory Name`	The unique name used by the API and managed packages.
`Territory Description`	A description of the territory.

SEE ALSO:

- Create Custom Territory Fields
- Display and Edit Territories
- Creating Territories

Create Custom Territory Fields

You can add up to 500 custom territory fields to tailor territories for your company's unique requirements.

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

From the object management settings for territories, go to the fields area. From this area, you can view details of standard fields, create or edit custom fields, or define field dependencies.

Note: Territories don't have customizable page layouts. New custom fields are added in alphabetical order at the bottom of the territory detail page.

SEE ALSO:

- Display and Edit Territories
- Creating Territories
- Territory Fields

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or edit custom territory fields:

- "Manage Territories"

  OR

  You are a forecast manager. Forecast managers can manage territories of those users working below them in territory hierarchy.

Deleting Territories

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

You can only delete territories that do not have any child territories. When a territory is deleted, the following items are no longer associated with that territory:

- All users, whether or not `Active in Territory` is checked
- All accounts, whether assigned manually or by account assignment rules
- All opportunities

To delete a territory:

1. From Setup, enter *`Hierarchy`* in the `Quick Find` box, then select **Territory Hierarchy**.
2. Click **Del** next to a territory in the hierarchy. Alternatively, select the name of a territory and click **Delete**.

Note: Restoring an account or opportunity from the Recycle Bin restores the territory assignment, but it does not trigger the evaluation of account assignment rules. If account assignment rules changed while the record was in the Recycle Bin, the restored record may have territories that are inconsistent with the new rules.

SEE ALSO:

Display and Edit Territories

Building Your Territory Hierarchy

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To delete territories:

- "Manage Territories"

  OR

  You are a forecast manager. Forecast managers can manage territories of those users working below them in territory hierarchy.

Managing Users in Territories

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

A territory can have an unlimited number of users, and a user can be assigned to an unlimited number of territories.

In the context of a specific territory, users have both an `Active` status and an `Active in Territory` status:

Active

An active user is able to log in to Salesforce.

Deactivated users continue to own opportunities and appear in forecasts and territories. When users are deactivated, their opportunity forecast overrides, adjusted total overrides, and manager's choice overrides on subordinates' forecasts are frozen. However, the manager of a deactivated user can apply manager's choice overrides to that user's forecasts. Rollup amounts are kept current. If a deactivated user is later reactivated, the user can resume normal work as before. If "Allow Forecasting" is disabled for a user who is deactivated, the user is removed from any territories her or she is assigned to.

Users can set their active status by modifying their personal information page in their personal settings.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign users to territories:

- "Manage Territories"

  AND

  "Manage Users"

Active in Territory

Users with `Active in Territory` checked on the territory detail page have open opportunities, closed opportunities, or no opportunities at all in that territory. Users with `Active in Territory` deselected have been transferred out of or removed from the territory, but retain ownership of opportunities in the old territory.

To view the territories to which you belong, view the Territories related list on your personal information page. To view this related list for any user, from Setup, enter *`Users`* in the `Quick Find` box, then select **Users**.

Adding Users to Territories

To add users to a territory:

1. From a territory detail page, click **Add Users**.
2. To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views.
3. Select and deselect checkboxes in the Action column to move users between the Available and Selected areas. Also, you can:
   - Click a letter to view users who correspond to that letter.
   - Click **All** to display all users who match the criteria of the current view.
   - Click **select shown** to move all users that are shown on the current list page to the Selected area below.
   - Click **deselect shown** or **deselect all** to move users from the Selected area to the Available area.

   Note: Users already assigned to the territory will not appear in the Available users list even if they meet the list view criteria.
4. When the Selected area includes all users that you want to assign to the territory, click **Assign**.

Removing Users from Territories

You can remove a user from a territory and choose who will receive his or her open opportunities:

1. In the Assigned Users related list on the territory detail page, click **Remove** next to the user's name.
2. Click the `New Owner` lookup icon (🔍) to select a recipient for any open opportunities the user may have.
3. Alternatively, leave the `New Owner` field blank. One of the following results will occur:
   - If the parent territory has a forecast manager, then that forecast manager takes ownership of the user's open opportunities. Also, the forecast manager is assigned to the territory with `Active in Territory` unchecked.
   - If the parent territory does not have a forecast manager, then the user remains in the territory with `Active in Territory` unchecked.
4. Click **Save**.

   If very large amounts of data are affected, you will be sent a confirmation email when the operation has completed.

Transferring Users Between Territories

The user transfer wizard allows you to move a user from one territory to another, choose which open opportunities the user will continue to own, and designate a recipient for open opportunities the user leaves behind.

To transfer a user to another territory:

1. In the Assigned Users related list on the territory detail page, click **Transfer** next to the user's name.

2. Click **Select** next to the territory to which you are transferring the user. If necessary, expand or collapse nodes in the territory hierarchy to display the desired destination territory.
3. Click the `New Owner` lookup icon (🔍) to select the user who will take ownership of the open opportunities that the transferred user does not keep. Click **Next** to proceed.

   If you skip this step and choose not to select a recipient, the forecast manager of the parent territory of the user's former territory automatically receives the open opportunities that the user does not keep. If there is no forecast manager in the parent territory of the user's former territory, then the user being moved retains ownership of his or her opportunities.
4. Choose a list view of the user's open opportunities.
5. Click **Select** and **Deselect** to move opportunities between the Available and Selected areas. Also, you can:
   - Click a letter to view opportunities that correspond to that letter.
   - Click **All** to display all opportunities that match the criteria of the current view.
   - Click **select shown** to move all opportunities that are shown on the current list page to the Selected area below.
   - Click **deselect shown** or **deselect all** to move opportunities from the Selected area to the Available area.
6. When the Selected area shows the opportunities that you want the user to retain after the transfer, click **Transfer**.

   If very large amounts of data are affected, you will be sent a confirmation email when the operation has completed.

Note: If you transfer the forecast manager out of a territory, that territory will no longer have a forecast and any opportunity overrides for that territory that were created by forecast managers above it in the territory hierarchy will be deleted. See Overriding Customizable Forecasts.

SEE ALSO:

Display and Edit Territories

Adding Forecast Managers to Territories

Viewing Assigned Users Lists

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

The assigned users list page displays a list of users assigned to the selected territory. From this page, you can view detailed user information, remove users from territories, transfer users between territories, and access other related information.

- To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views. The default `View` is your last selected user view.
- Click a username to view the user detail.
- Click **Remove** next to a username to remove the user from the territory.
- Click **Transfer** next to a username to transfer the user between territories.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view assigned users:
- "View Setup and Configuration"

To remove or transfer a user:
- "Manage Territories"

  AND

  "Manage Users"

SEE ALSO:

Managing Account Assignment Rules

Adding Forecast Managers to Territories

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Consider the following before assigning the forecast manager for a territory:

- A territory can have only one forecast manager. See Assigning Forecast Managers in Your Forecast Hierarchy on page 267.
- Forecasts from child and lower-level territories roll up to forecast managers.
- If a territory has no forecast manager, there is no forecast for that territory.
- Forecast managers can receive opportunities when users are transferred out of or removed from a territory.
- Forecast managers can receive opportunities when account assignment rules are run.
- On the territory settings page, you can enable forecast managers to act as delegated administrators for territories below them in the hierarchy.

To assign or change the forecast manager for a territory:

1. On the territory detail page, click **Change** next to the `Forecast Manager` field.
2. Select a name from the drop-down list to specify the territory's forecast manager.

   On the right, a tree view of the territory hierarchy allows you to see the child and lower-level territories whose forecasts will roll up to the forecast manager.

3. Click **Save** to finish.

SEE ALSO:

Assigning Forecast Managers in Your Forecast Hierarchy

Display and Edit Territories

Configuring Territory Management Settings

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign forecast managers to territories:

- "Manage Users"

  AND

  "Manage Territories"

  AND

  "Customize Application"

Managing Account Assignment Rules

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage account assignment rules:

- "Manage Territories"

  OR

  You are a forecast manager. Forecast managers can manage territories of those users working below them in territory hierarchy.

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

You can create account assignment rules that automatically move accounts and their associated opportunities and cases into territories based on any standard or custom account field, such as zip code, state, industry, revenue, or number of employees. Each rule consists of multiple rows of criteria that specify exactly how the accounts are assigned.

Account assignment rules are governed by the following:

- A territory can have inherited account assignment rules, meaning that the rules were created somewhere higher in the territory hierarchy and consequently also impact the given territory.
- A territory can have locally defined account assignment rules, meaning that the rule was created at the given territory.
- If a territory doesn't have any inherited or locally-defined account assignment rules, then it only contains accounts that were manually added.
- If an account matches all inherited and locally-defined account assignment rules for multiple territories on the same branch of the hierarchy, then the account is assigned to the lowest matching territory.
- If an account matches a territory's inherited account assignment rules but not all of the territory's locally-defined rules, then the account isn't assigned to the territory, but is evaluated for child territories.

For example, you have three territories:

- Territory A has four rules marked "Apply to child territories", and is a parent of territory B.
  - Territory B has three rules not marked "Apply to child territories", and is a parent of territory C.
    - Territory C has two rules.

If you assign an account that matches all of territory A's and territory C's rules but only one of territory B's rules, then the account is assigned to territory C. However, if territory B's rules are marked "Apply to child territories," then the account is assigned only to territory A.

Working with Account Assignment Rules

Click **Run Rules** on the territory detail page to evaluate the active inherited, locally defined rules shown on the page against all existing accounts in your organization. The rules for all subordinate territories are also evaluated—that is, when you run rules on the top-level territory, all rules in the entire hierarchy are evaluated. When you click **Run Rules**, an icon ( ) displays next to the button for all affected territories to indicate that rules are being processed. An email confirmation is sent when processing is complete.

Note: To protect data quality, you can't modify a territory while the processing icon displays.

Click **Manage Rules** on the territory detail page to access the Manage Account Assignment Rules page, where you can create, edit, preview, and run account assignment rules:

- Click **New** to create a new rule, or **Edit** to edit an existing rule. See Creating and Editing Account Assignment Rules on page 167.
- Use the `Active` checkbox to set a locally-defined rule as active or inactive.

  Active account assignment rules automatically evaluate accounts and assign them to territories when:

  - An account is created using the Salesforce user interface, the Force.com API, or a client such as Connect Offline.

  - An account is imported using an import wizard.
  - An account is created by the conversion of a lead.
  - An account is edited and saved if the `Select by default` checkbox is selected for the `“Evaluate this account against territory rules on save” checkbox` option under **Layout Properties**. If the account assignment rule initiates an opportunity ownership change, you must have transfer access on the opportunity.
  - An account is edited and saved via the Force.com API.
  - **Run Rules** is clicked on a territory detail page, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
  - **Save & Run Rules** is clicked on the manage account assignment rules page for a territory, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
  - Duplicate accounts are merged.
- Click a rule name to see the details of that rule, including its active status and criteria. From a rule detail page you can edit, delete, or clone a rule.
- Click **Preview** to see the accounts that would be assigned to this territory and its child territories if the rules currently marked active were run. See Previewing Account Assignments on page 168.
- Click **Save** to save the current active status of locally-defined rules.
- Click **Save & Run Rules** to save the current active status of locally-defined rules and evaluate the inherited and locally-defined rules shown on the page against all existing accounts in your organization. Running account assignment rules affects accounts in the Recycle Bin.

Click **Edit** on the territory detail page to toggle the `Confine Opportunity Assignment` checkbox. When it is selected, the territory's opportunities remain in the territory or its child territories when you run account assignment rules. The following exceptions apply:

- If an opportunity's account moves to only one of the territory's children, then the opportunity follows the account and is reassigned to the account's new territory. This includes when an account moves to multiple territories and only one of the new territories is a child of the original territory.
- If an opportunity's account moves to more than one of the territory's children, then the opportunity's territory field is set to blank.
- If an opportunity's account moves completely out of the territory and its children, then the opportunity's territory field is set to blank.

Tip: You can also manage account assignment rules using the Data Loader or the Web services API.

Account Assignment Rules and Opportunities

Several factors determine how account assignment rules assign opportunities to territories, including:

- Whether the account associated with the opportunity is assigned to one or more territories
- Whether the opportunity owner is a member of the same territory as the account
- The number of users assigned to the territory
- Whether a forecast manager is assigned to the territory

Note: If you’re updating an account which triggers an account assignment rule that is part of territory management, you must have transfer access on the opportunity if the account assignment rule initiates a change in the opportunity ownership.

Accounts with One Territory

If the account associated with the opportunity is assigned to only one territory, use the following table to determine how the opportunity's territory is assigned:

Opportunity Owner Belongs to Same Territory as Account	Number of Users Assigned to Territory	A Forecast Manager is Assigned to the Territory	Results
Yes	1	N/A	The opportunity is assigned to the same territory as the account. The opportunity owner is unchanged.
No	1	N/A	The opportunity is assigned to the same territory as the account and the opportunity owner is the sole member of the territory.
No	0	N/A	The opportunity is assigned to the same territory as the account and the opportunity owner is added as an inactive member of the territory. The owner of the opportunity remains unchanged.
Yes	>1	Yes	The opportunity is assigned to the same territory as the account and the forecast manager becomes the opportunity owner.
Yes	>1	No	The opportunity is assigned to the same territory as the account. The owner of the opportunity remains unchanged if the opportunity owner has `Active in Territory` selected on the territory detail page.
No	>1	Yes	The opportunity is assigned to the forecast manager of the territory.
No	>1	No	The opportunity is assigned to the same territory as the account and the opportunity owner is added as an inactive member of the territory. The owner of the opportunity remains unchanged.

Accounts with Multiple Territories

If the account associated with the opportunity is assigned to more than one territory, use the following table to determine how the opportunity's territory is assigned:

Opportunity Owner's Territory Membership	Results
Opportunity owner has one territory in common with the account	The opportunity is not assigned to any territories. The opportunity owner can assign the opportunity to the territory that he or she has in common with the account.
Opportunity owner has more than one territory in common with the account	The opportunity is not assigned to any territories. The opportunity owner can assign the opportunity to any territory that he or she has in common with the account.

Opportunity Owner's Territory Membership	Results
Opportunity owner has no territories in common with the account	The opportunity is not assigned to any territories. The opportunity owner cannot assign the opportunity to any territories.

Territory Assignments for Standard Users

If the user creating the opportunity is a standard user, Salesforce automatically assigns a territory to a new opportunity only if the user and account have exactly one territory in common. For example, James, who is a standard user assigned to the Westlake territory only, creates an opportunity on the Filmore, Inc. account. Filmore, Inc. belongs to the Westlake territory and one other territory. Because James and Filmore, Inc., have exactly one territory in common, the new opportunity is assigned to the Westlake territory. If James belonged to the account's other territory, the opportunity would not be assigned to a territory.

Use the following table to determine when a territory will be assigned to an opportunity created by a standard user.

Number of Territories Assigned to User	Number of Territories Assigned to Account	Opportunity Owner Belongs to Same Territory as Account	Results
1	1	Yes	The opportunity is assigned to the territory in common.
>1	1	Yes	The opportunity is assigned to the account's territory if the user belongs to that same territory.
1	>1	Yes	The opportunity is assigned to the user's territory if the account is associated with that same territory.
>1	>1	Yes	The opportunity is not assigned to any territories. The opportunity owner can assign the opportunity to any territory that he or she has in common with the account.
N/A	N/A	No	The opportunity is not assigned to any territories.

Territory Assignments for Administrators

A user who is an administrator or has “Manage Territories” permission can view all territories.

If the user is an administrator, a territory-delegated administrator, or a user with the “Manage Territories” permission, Salesforce automatically assigns a territory to a new opportunity only if the administrator, the account, and the account's parent accounts have exactly one territory in common. For example, Jennifer is an administrator who manages the Northlake and Westlake territories. She creates an opportunity on the Richmond Brothers account. Richmond Brothers is associated with the Northlake and Southlake territories. Richmond Brothers has one parent account, Zyman Products, which is assigned to the Northlake and Eastlake territories. Because Jennifer, Richmond Brothers, and Zyman Products have only the Northlake territory in common, the new opportunity is assigned to the Northwest territory. If Richmond Brothers or Zyman Products also belonged to the Westlake territory, the opportunity would not be assigned to a territory.

Use the following table to determine when a territory will be assigned to an opportunity created by an administrator.

Number of Territories Administrator Manages	Number of Territories Assigned to Account	Number of Territories Assigned to Account's Parent Account(s)	Opportunity Owner Manages Same Territory as Account and Parent Account(s)	Results
1	1	1	Yes	The opportunity is assigned to the territory in common.
>1	1	1	Yes	The opportunity is assigned to the territory in common.
1	>1	1	Yes	The opportunity is assigned to the territory in common.
1	1	>1	Yes	The opportunity is assigned to the territory in common.
>1	>1	1	Yes	The opportunity is assigned to the parent account's territory if the administrator and the account have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account
1	>1	>1	Yes	The opportunity is assigned to the administrator's territory if the account and the account's parent account(s) have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account
>1	1	>1	Yes	The opportunity is assigned to the account's territory if the administrator and the account's parent account(s) have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account
>1	>1	>1	Yes	The opportunity is assigned to the administrator's territory if the administrator, the account, and the account's parent account(s) have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account.

Number of Territories Administrator Manages	Number of Territories Assigned to Account	Number of Territories Assigned to Account's Parent Account(s)	Opportunity Owner Manages Same Territory as Account and Parent Account(s)	Results
N/A	N/A	N/A	No	The opportunity is not assigned to any territories.

SEE ALSO:

Creating and Editing Account Assignment Rules

Previewing Account Assignments

Display and Edit Territories

Creating and Editing Account Assignment Rules

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or edit account assignment rules:

- "Manage Territories"

  OR

  You are a forecast manager. Forecast managers can manage territories of those users working below them in territory hierarchy.

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

A territory can have a maximum of 15 account assignment rules, including both active and inactive rules. To create or edit an account assignment rule:

1. From Setup, enter *`Hierarchy`* in the `Quick Find` box, then select **Territory Hierarchy**.
2. Select the territory you want to modify.
3. Click **Manage Rules** in the Account Assignment Rules related list.
4. Click **New** to create a new account assignment rule. To edit an existing account assignment rule, click **Edit**.
5. Enter a name for the rule. Rule names must be unique and can have a maximum of 80 characters.
6. Define filter criteria that accounts must match to be included in the territory.

   If your organization uses multiple languages, use your organization's default language when specifying your criteria. When you use picklists to specify filter criteria, the selected values are stored in the organization's default language. If you edit or clone existing filter criteria, first set the `Default Language` on the Company Information page to the same language that was used to set the original filter criteria. Otherwise, the filter criteria may not be evaluated as expected.

7. Optionally, check the `Apply to child territories` box that makes the rule applicable to child territories
8. Optionally, check the `Active` box to activate the rule. Inactive rules never run.

   Active account assignment rules automatically evaluate accounts and assign them to territories when:

   - An account is created using the Salesforce user interface, the Force.com API, or a client such as Connect Offline.
   - An account is imported using an import wizard.
   - An account is created by the conversion of a lead.
   - An account is edited and saved if the `Select by default` checkbox is selected for the `"Evaluate this account against territory rules on save" checkbox` option under **Layout Properties**. If the account assignment rule initiates an opportunity ownership change, you must have transfer access on the opportunity.

- An account is edited and saved via the Force.com API.
- **Run Rules** is clicked on a territory detail page, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
- **Save & Run Rules** is clicked on the manage account assignment rules page for a territory, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
- Duplicate accounts are merged.

9. Click **Save** to finish, or **Save & New** to save the rule and begin defining another rule.

Tip: By creating at least one account assignment rule at the top of your territory hierarchy that applies to child territories, you can build a hierarchy where all accounts match the top-level criteria and subordinate territories differentiate accounts by more specific criteria.

Similarly, if your organization uses divisions, create a rule at the top of your territory hierarchy that filters accounts by division and applies to child territories.

SEE ALSO:

Managing Account Assignment Rules

Previewing Account Assignments

Display and Edit Territories

Previewing Account Assignments

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Before running account assignment rules, preview a list of the accounts that would be assigned to the territory and territories below it in the territory hierarchy if the rules currently marked active were run:

1. From the territory detail page, click **Manage Rules** > **Preview**.
2. Click **Save** to save the active status of the rules. Click **Save & Run Rules** to save the active status of the rules and evaluate the rules against all existing accounts in your organization.

Note: Running account assignment rules affects accounts in the Recycle Bin.

SEE ALSO:

Managing Account Assignment Rules

Creating and Editing Account Assignment Rules

Display and Edit Territories

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To preview account assignments in territories:

- "Manage Territories"

  OR

  You are a forecast manager. Forecast managers can manage territories of those users working below them in territory hierarchy.

Viewing Inherited Rules Lists

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

The inherited rules list page displays a list of account assignment rules inherited by the selected territory. From this page, you can view detailed rule information and access information on individual rules.

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

SEE ALSO:

Manually Assigning Accounts to Territories

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view inherited rules:

- "View Setup and Configuration"

Manually Assigning Accounts to Territories

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

As an alternative to creating and running account assignment rules, you can add accounts to territories manually:

1. On the territory detail page, click **Add Accounts** on the Manually Assigned Accounts related list.
2. Choose a view from the drop-down list, or click **Create New View** to build a new custom view.
3. Click **Select** and **Deselect** to move accounts between the Available and Selected areas. Also, you can:
   - Click a letter to view accounts that correspond to that letter.
   - Click **All** to display all accounts that match the criteria of the current view.
   - Click **select shown** to move all accounts that are shown on the current list page to the Selected area below.
   - Click **deselect shown** or **deselect all** to move accounts from the Selected area to the Available area.
4. When the accounts in the Selected area includes all accounts that you want to manually add to the territory, click **Assign**.

Note: Manually adding accounts and running account assignment rules are completely independent. A manually added account remains in a territory until it is manually removed. There is nothing to prevent assignment rules also adding the account to the territory.

SEE ALSO:

Display and Edit Territories

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manually add accounts to territories:

- "Manage Territories"

  AND

  "Edit" on accounts

  OR

  You are a forecast manager, `Forecast managers can manage territories` is selected, you are working below your position in the territory hierarchy, and you have "Edit" on accounts.

Customizing Options for Selling

Customize Opportunities and Products

Get the most out of opportunities and products by setting up these additional features.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions for organizations activated after Summer '09

IN THIS SECTION:

Enable and Configure Similar Opportunities

Allow users to find Closed/Won opportunities that match the attributes of an opportunity they're currently working on, so they can quickly access information that might help them close their open deals.

Make It Easy to Add Products to Opportunities

Set up Salesforce to prompt your users to add products when they create an opportunity. When you select `Prompt users to add products to opportunities` in Opportunity Settings, the label for the save button in a new opportunity record is "Save & Add Product."

Enable Opportunity Update Reminders

Updated and accurate opportunities drive precise forecasts. Enabling update reminders lets managers send their direct reports automated emails with a report on the team's open opportunities.

Activate and Deactivate Product Prices with Their Products Simultaneously

Set up Salesforce so that when you activate or deactivate a product, all related prices for that product are activated or deactivated at the same time.

Restrict Price and Quantity Editing on Opportunity Products

Control whether users can update the `Price` and `Quantity` fields on opportunities.

Activate Big Deal Alerts

Your organization can use alerts that automatically send an email notification for opportunities with large amounts. You can activate one opportunity alert for your organization. The alert message resembles the opportunity detail page including the page layout and language from a selected user.

Customize Big Deal Alerts

Your organization can use alerts that automatically send an email notification for opportunities with large amounts. Customize this alert to send an email when an opportunity reaches a threshold.

Enable and Configure Similar Opportunities

Allow users to find Closed/Won opportunities that match the attributes of an opportunity they're currently working on, so they can quickly access information that might help them close their open deals.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions for organizations activated after Summer '09

USER PERMISSIONS

To enable and configure similar opportunities:
- "Customize Application"

Note:

- Searches are constructed as *OR* statements. Therefore, Closed/Won opportunities need to match only one criteria to be considered similar. For best search results, include multiple search
- When deciding which opportunity fields to display on the Similar Opportunities related list, be aware that users will see all fields that are displayed, regardless of sharing rules and user permissions.

1. From Setup, enter *`Similar Opportunities`* in the `Quick Find` box, then select **Similar Opportunities**.
2. Click **Edit**.
3. Select `Enable Similar Opportunities`.
4. Select the fields or related lists that you want Similar Opportunities searches to match against, and then click **Add**.
5. Select the fields to display in the Similar Opportunities related list.
6. Click **Save**.
7. Make sure the Similar Opportunities related list is added to the opportunity page layout.

Make It Easy to Add Products to Opportunities

Set up Salesforce to prompt your users to add products when they create an opportunity. When you select `Prompt users to add products to opportunities` in Opportunity Settings, the label for the save button in a new opportunity record is "Save & Add Product."

EDITIONS

Available in: Salesforce Classic

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

Enable Opportunity Update Reminders

Updated and accurate opportunities drive precise forecasts. Enabling update reminders lets managers send their direct reports automated emails with a report on the team's open opportunities.

1. From Setup, enter *`Update Reminders`* in the `Quick Find` box, then select **Update Reminders**.
2. Click **Edit**.
3. Select `Enable Update Reminders for My Organization`.
4. Optionally, select `Automatically Activate Reminders for Users with Direct Reports` to schedule opportunity update reminders for all users who have direct reports.
5. Click **Save**.
6. If you didn't automatically activate all users with direct reports, then select which users you want to be able to schedule opportunity update reminders. Any user that has direct reports can be added.
7. Click **Activate**.
8. Let those users know they can start scheduling update reminders for their direct reports.

Note: If an account owner is allowed to send opportunity update reminders, then all partner and customer portal users that are assigned as Executives to the account will receive the reminders, even if they don't have access to the opportunity. To avoid reminders being sent to these users, remove them from the Executive role.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable opportunity update reminders:
- "Customize Application" OR "Manage Users"

To activate or deactivate opportunity update reminders:
- "Manage Users"

Activate and Deactivate Product Prices with Their Products Simultaneously

Set up Salesforce so that when you activate or deactivate a product, all related prices for that product are activated or deactivated at the same time.

1. From Setup, enter *`Product Settings`* in the `Quick Find` box, then select **Product Settings**.
2. Select `When changing active flag on a product record`.
3. Save your changes.

SEE ALSO:

Restrict Price and Quantity Editing on Opportunity Products

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To auto-activate or auto-deactivate product prices:
- "Customize Application"

Restrict Price and Quantity Editing on Opportunity Products

Control whether users can update the `Price` and `Quantity` fields on opportunities.

To ensure that opportunity products use the price from the associated price book, remove the `Sales Price` field from the opportunity products page layout.

To use a quantity of one for all opportunity products, remove the `Quantity` field from the opportunity products page layout.

Note: If you cannot remove these fields from the page layout, contact Salesforce to enable this option.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To restrict price and unit editing:

- "Customize Application"

SEE ALSO:

Activate and Deactivate Product Prices with Their Products Simultaneously

Activate Big Deal Alerts

Your organization can use alerts that automatically send an email notification for opportunities with large amounts. You can activate one opportunity alert for your organization. The alert message resembles the opportunity detail page including the page layout and language from a selected user.

Before you begin, you may want to decide which user has the page layout and language settings that you would like included in all alerts. This user must also have the "View All Data" permission.

1. From Setup, enter *`Big Deal Alert`* in the `Quick Find` box, then select **Big Deal Alert**.
2. Enter a name for the alert.
3. Enter a `Trigger Probability` and `Trigger Amount` in the corporate currency. An opportunity alert is triggered for opportunities with this probability and amount or greater. The alert triggers only for those opportunities that meet both the trigger probability and trigger amount threshold settings.

   Note: An opportunity can trigger a big deal alert even if it is in a currency that is different from the corporate currency. The `Amount` on an opportunity is converted to corporate currency and compared to the `Trigger Amount`. If you are using advanced currency management, dated exchange rates will be used.

4. Check the `Active` box if you would like to activate the new alert immediately after you save.
5. Enter the `From Email Name`.
6. Enter the `From Email Address`.

   Note: The From address must be either one of your verified organization-wide email addresses or the email address listed in your Salesforce profile.

7. Select a user that provides the appropriate opportunity page layout, language, and currency settings for the content of the emails. This user must have the "View All Data" permission.

   For organizations that use multiple currencies, all alerts include the amount in the currency of the opportunity. If the opportunity currency is different than the currency of the user selected in this step, both currencies are included in the email.

   Enter a list of email recipients separated by commas. You can also include `CC`: and `BCC`: recipients but all must be valid email addresses.

   The `BCC:` field is not available if your organization has enabled compliance BCC emails.

8. Check the `Notify Opportunity Owner` box if you would like to include the owner of the opportunity in the alert emails.

9. Click **Save**.

Note: An opportunity alert sends a notification the first time an opportunity reaches the threshold. So, an opportunity that reaches the threshold with 90% probability will not trigger additional alerts if the probability subsequently goes higher. However, an opportunity that already triggered an alert and then fell below the threshold can trigger a second alert if it crosses that threshold again.

When working remotely in Connect Offline, you can make changes to opportunities that trigger alerts. These alert messages will be sent when you update your data.

SEE ALSO:

Customize Big Deal Alerts

Customize Big Deal Alerts

Your organization can use alerts that automatically send an email notification for opportunities with large amounts. Customize this alert to send an email when an opportunity reaches a threshold.

Your threshold consists of an opportunity amount and probability. For example, you can send an email to your team when an opportunity of $500,000 has reached a probability of 90%.

SEE ALSO:

Activate Big Deal Alerts

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To activate big deal alerts:

- "Customize Application"

Using Product Families

Use the `Product Family` picklist to categorize your products. For example, if your company sells both hardware and software, you can create two product families: Hardware and Software.

If your organization has customizable forecasting, your users can have a different quota for hardware sales and software sales. Users can also view forecasts for opportunities with hardware products separate from opportunities that include software products.

To begin using product families:

- Customize the `Product Family` picklist to include the different categories of products you sell.
- For each product in your price books, edit the product and select the appropriate `Product Family` value.
- If your organization has customizable forecasting, set a different quota for each product family for your users.
- If your organization has customizable forecasting, consider changing your forecast settings to display a particular forecast family value by default when your users click the Forecasts tab.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit product families:

- "Customize Application"

Enable Product Schedules

Create default revenue and quantity schedules for products that are delivered or paid for over a period of time. In addition, administrators can enable schedule settings that allow users to create schedules for individual products on opportunities.

1. From Setup, enter `Product Schedules` in the `Quick Find` box, then select **Product Schedules Settings**.
2. Select the appropriate checkboxes to enable quantity and revenue schedules for your organization. Note that disabling a schedule type automatically deletes all existing schedule information from products.

   For a definition of each schedule type, see Products, Price Books, and Schedules Overview.
3. For each schedule type you enable, select whether to automatically enable that schedule type for every product in your price books. This option automatically selects the `Quantity Scheduling Enabled` or `Revenue Scheduling Enabled` checkboxes on every product in your price books.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

For greater control of schedules on a product-by-product basis, administrators can also determine which schedule types users can establish for each product.

Note: Enabling or disabling schedules does not affect archived products.

If schedules are referenced in Apex, only one of the schedule types (quantity or revenue) can be disabled. For example, if Apex references the schedule object (represented as `OpportunityLineItemSchedule` in the code), one of the schedule types can be disabled, but not both.

Help Sales Reps Manage Their Meetings and Tasks

Help Your Sales Reps Manage Events and Tasks Together

Give sales reps a more accurate perspective on their leads, contacts, opportunities, and accounts. Use combined activities settings to help them manage and track meetings and tasks. Options differ for Lightning Experience and Salesforce Classic.

IN THIS SECTION:

Considerations for the Activity Composer and Activity Timeline in Lightning Experience

In some Salesforceorgs, page layouts or record types need adjustments to prevent tabs from disappearing from the activity composer. Also, if you customize the display and order of fields in the activity timeline, be aware of the behavior of certain fields.

Considerations for Activity Reminder Setup in Salesforce Classic

Disabling individual preferences for displaying event and task reminders erases users' activity reminder settings. If you re-enable activity reminders later, users receive reminders only for activities they create or edit after you re-enable the setting.

Considerations for Shared Activities (Multiple Contacts on an Activity)

Use Shared Activities to let users relate multiple contacts to each event or task and to view information about open activities and activity history on contact detail pages. If you enable Shared Activities, or if it's enabled by default in your Salesforce org, you can't disable it. Whether you enable Shared Activities or leave it disabled, review these considerations.

Guidelines for Shared Activities (Multiple Contacts on an Activity)

To include related contacts alongside other event and task details, include the Name related list in the event and task detail page layouts.

SEE ALSO:

Customization Options for Managing Events and Tasks Together

Considerations for the Activity Composer and Activity Timeline in Lightning Experience

In some Salesforceorgs, page layouts or record types need adjustments to prevent tabs from disappearing from the activity composer. Also, if you customize the display and order of fields in the activity timeline, be aware of the behavior of certain fields.

EDITIONS

Available in Lightning Experience in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Configuration of Page Layouts and Record Types Affects Tabs in Activity Composer

Settings for page layouts and record types in some Salesforce orgs prevent the activity composer on opportunities or other objects from displaying activity tabs. To adjust your settings, see Configure the Call, Task, and Event Tabs in the Activity Composer in Lightning Experience on page 177 and Configure the Email Action in the Activity Composer in Lightning Experience on page 177.

Activity Timeline and Activities Related Lists (Open Activities, Activity History)

On the detail page for objects that support activities, Salesforce doesn't display the Open Activities and Activity History related lists along with other related lists. It displays the activity timeline instead. Objects that support activities include opportunities, leads, accounts, contacts, and custom objects on which you enable activities.

If you delete either activity related list (Open Activity or Activity History) from page layouts, Salesforce doesn't display the corresponding timeline sections—Next Steps or Past Activity—on those pages.

The activity timeline displays open activities in the opposite order from the Open Activities related list. Instead, it represents all activities in a continuum from future to past. From top to bottom under Next Steps, the timeline displays activities in chronological order to today. Undated tasks appear at the top, and overdue tasks appear at the bottom.

What Happens When You Customize the Display and Order of Fields in the Activity Timeline

In the activity timeline, you can customize the display and order of fields for events, tasks, and logged calls using event and task compact layouts. However, even if you remove certain fields from a layout, they remain in the timeline because they contain critical activity information. For example, suppose that you remove the due date, the date and time, or the task status fields from the compact layouts. The event start date and time, the task checkbox, the task due date, and the call logging date still appear on activities in the timeline. The description field on events and the comments field on tasks also always appear in the timeline, although they aren't available in the compact layout. The remaining fields visible in the timeline reflect the fields you include in the compact layout.

No Customization Support for Activity Timeline Icons

You can't customize the icons for activity types (events, tasks, calls, and email) in the timeline.

Conditions for Closing or Reopening a Task

Suppose you've created a validation rule for closing a task; for example, you require users to enter a comment. Users must edit the task details before they can close the task. If you've set up more than one Closed or Open status for tasks, users must choose a status when they reopen or close a task.

IN THIS SECTION:

Configure the Call, Task, and Event Tabs in the Activity Composer in Lightning Experience

Is the call, task, or event tab missing from the activity composer on opportunities or other objects in your Salesforce org? Check your layout, record type, and permissions settings.

Configure the Email Action in the Activity Composer in Lightning Experience

Is the Email action missing from the activity composer on opportunities or other objects in your Salesforce org? Check your layout and permissions settings.

SEE ALSO:

Guidelines for Customizing the Task List in Lightning Experience

Configure the Call, Task, and Event Tabs in the Activity Composer in Lightning Experience

EDITIONS

Available in Lightning Experience in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Is the call, task, or event tab missing from the activity composer on opportunities or other objects in your Salesforce org? Check your layout, record type, and permissions settings.

1. Look at the object's page layout—opportunities, leads, accounts, contacts, or a custom object that supports activities. Check whether you've included the corresponding action in the Salesforce1 and Lightning Experience Actions section of the object's page layout.

   Note: An object page inherits the actions of the global page layout unless you've customized the actions in the Salesforce1 and Lightning Experience Actions section of the object's page layout.

2. Have you created a custom record type for calls, tasks, or events? (Record types determine a record's layout and picklist values. You can define one or more record types for users to choose from when they create an event or a task.) Look at the page layout that you've associated with the custom record type. Ensure that you've assigned the custom record type to the corresponding action. For example, if you created a custom record type for calls, assign it to the Log a Call action.
3. Ensure that your users have permission to view that custom record type.

Configure the Email Action in the Activity Composer in Lightning Experience

EDITIONS

Available in Lightning Experience in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Is the Email action missing from the activity composer on opportunities or other objects in your Salesforce org? Check your layout and permissions settings.

1. If the Email action is missing from the activity composer, open the page layout assigned to the record type for the opportunity or other object.
2. Add the **Send an Email** action (*not* the Send Email action) to the Salesforce1 and Lightning Experience Actions section of the page layout.
3. Make sure that your users have the **Send Email** (*not* Send *an* Email) permission.

Considerations for Activity Reminder Setup in Salesforce Classic

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Disabling individual preferences for displaying event and task reminders erases users' activity reminder settings. If you re-enable activity reminders later, users receive reminders only for activities they create or edit after you re-enable the setting.

Considerations for Shared Activities (Multiple Contacts on an Activity)

EDITIONS

Available in Lightning Experience in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Use Shared Activities to let users relate multiple contacts to each event or task and to view information about open activities and activity history on contact detail pages. If you enable Shared Activities, or if it's enabled by default in your Salesforce org, you can't disable it. Whether you enable Shared Activities or leave it disabled, review these considerations.

Considerations for Enabling Shared Activities

Limit on Number of Contacts

Your sales reps can relate up to 50 contacts to each event or task.

Time Needed to Enable Shared Activities

Enabling Shared Activities takes up to 48 hours, depending on the volume of activity in your Salesforce org. During this process, sales reps can continue working with events and tasks. The Activity Settings page in Setup displays messages about the status and what to do if the process doesn't finish.

Display of Related Contacts Alongside Other Activity Details

To show related contacts on event and task detail pages, ensure that the Name related list is included on event and task page layouts. Be aware that the items in the Name related list aren't fields, so they don't adhere to field-level security settings.

Visualforce Display of Events

If a Visualforce page uses the standard controller to display Shared Activities events, use API version 26.0 or later.

Considerations for Leaving Shared Activities Disabled

Limitations in Custom Reports Based on Activity Relationships

If you don't enable Shared Activities, custom reports based on activity relationships work as follows.

- They show only invitees to an event but not the organizer.
- They don't show events to which no one has been invited.

No Support for Activity Custom Lookups

If you don't enable Shared Activities, custom report types that use activity custom lookup field relationships aren't supported.

Duplicate Records Created for Email

If you don't enable Shared Activities and a sales rep sends an email to multiple contacts, Salesforce creates a closed task for each contact. As a result, Salesforce creates duplicate records instead of just one task corresponding to the email.

Guidelines for Shared Activities (Multiple Contacts on an Activity)

EDITIONS

Available in Lightning Experience in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in Salesforce Classic in: **All** Editions Except **Database.com**

To include related contacts alongside other event and task details, include the Name related list in the event and task detail page layouts.

Help Your Sales Reps Manage Events and Calendars

Optimize the way your sales reps manage their meetings and scheduling. Options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

IN THIS SECTION:

Create and Manage a Public Calendar or a Resource Calendar in Salesforce Classic

Use a public calendar to manage group activities. For example, track a group's events, such as marketing events, product releases, or training classes, or schedule a common activity, such as a team vacation. Use a resource calendar to schedule the use of a shared resource, such as a conference room or an overhead projector.

Set Up Cloud Scheduler in Salesforce Classic

The New Meeting Request button is enabled by default on page layouts. It lets your users use Cloud Scheduler to request meetings with customers. The button appears on the Open Activities related list on the detail pages of contacts, leads, and person accounts.

Event Fields

Event records have standard fields for tracking and recording event details.

SEE ALSO:

Customization Options for Events and Calendars

Create and Manage a Public Calendar or a Resource Calendar in Salesforce Classic

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Group Edition**, **Personal Edition**, and **Database.com**

USER PERMISSIONS

To manage public calendars:
- "Customize Application"

To manage resource calendars:
- "Customize Application"

To view a related record on an event:
- Users must have "Read" permission

Use a public calendar to manage group activities. For example, track a group's events, such as marketing events, product releases, or training classes, or schedule a common activity, such as a team vacation. Use a resource calendar to schedule the use of a shared resource, such as a conference room or an overhead projector.

You can create an unlimited number of calendars.

- View and edit your existing public calendars and resource calendars.

  From Setup, enter `Public Calendars and Resources` in the `Quick Find` box, then select **Public Calendars and Resources**.

- Create a public calendar or a resource calendar.
  1. Click **New**, name the calendar, select **Active**, and save the calendar.
  2. Click **Sharing**. Add the public groups, roles, or people you want to share the calendar with.
  3. In Calendar Access, specify the way you want to share the calendar.

     Hide Details

     Other people can see whether given times are available, but they can't see other information about events in the calendar.

     Hide Details and Add Events

     Other people can see whether given times are available, but they can't see details of events. Other people can insert events in the calendar.

     Show Details

     Other people can see detailed information about events in the calendar.

     Show Details and Add Events

     Other people can see detailed information about events in the calendar, and they can insert events in the calendar.

Full Access

Other people can see detailed information about events in the calendar, insert events in the calendar, and edit existing events in the calendar.

- Delete a public calendar.
  1. From Setup, enter `Public Calendars and Resources` in the `Quick Find` box, then select **Public Calendars and Resources**.
  2. Click **Del** next to the name of a calendar.

Ensure that users have the appropriate permissions. For example, an event invitee who doesn't have "Read" permission on opportunities can't view the opportunity associated with the event.

Set Up Cloud Scheduler in Salesforce Classic

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

USER PERMISSIONS

To customize page layouts and activity settings:
- "Customize Application"

The New Meeting Request button is enabled by default on page layouts. It lets your users use Cloud Scheduler to request meetings with customers. The button appears on the Open Activities related list on the detail pages of contacts, leads, and person accounts.

Use the following methods alone or in combination to control whether the New Meeting Request button is displayed on detail page layouts. The button is also available in the Calendar section on the Home tab when the Requested Meetings subtab is enabled. The following add and remove actions don't affect the button in the Calendar section.

Cloud Scheduler Quick Setup for Multiple Page Layouts

1. From Setup, enter `Cloud Scheduler` in the `Quick Find` box, and then select **Cloud Scheduler**.
2. If you're adding the button and the new UI theme isn't already enabled, enable it on the User Interface page in Setup.
3. To add the **New Meeting Request** button to the Open Activities related list on all eligible page layouts, click **Add Button**. To remove the button from all current page layouts, click **Remove Button**.

Cloud Scheduler Manual Setup for Individual Page Layouts

1. If you're adding the button and the new UI theme isn't already enabled, enable it on the User Interface page in Setup. See Customize User Interface Settings.
2. Add or remove the **New Meeting Request** button to the Open Activities related list on the page layouts you want.
   - Contacts
   - Leads
   - Person Accounts (if enabled)

     To allow users to request a meeting with a person account, add the `Email` field to the page layout. From the object management settings for person accounts, go to Page Layouts.

Cloud Scheduler Optional Settings

You can optionally enable these settings to make Cloud Scheduler even more useful.

- Ask your users to install Salesforce for Outlook.

We recommend that users sync their calendar events between Salesforce and Outlook to propose meeting times based on their availability displayed in their Salesforce calendar.

- Add your company logo to the meeting requests sent to invitees.
- Show requested meetings in the Calendar section on the Home tab.

  The Requested Meetings subtab is displayed by default. If you remove the New Meeting Request button from all page layouts, we recommend that you also remove the Requested Meetings subtab because your users can't request meetings.

- Enable your Partner users to request meetings using Cloud Scheduler. The customPartner User profile must have the correct user permissions on page 181, and it must be active and assigned to your Partner users.

User Permission Requirements

Users must have the "Send Email" and "Edit Events" permissions to request meetings. These permissions are enabled in most standard profiles.

If users don't have the required permissions, they:

- Can't see the New Meeting Request button on the Open Activities related list
- Can't edit, reschedule, or cancel requested meetings

Field-Level Security Requirements

In most cases, you don't need to change field-level security settings to allow users to request meetings. However, if you've changed the default field-level security settings for certain profiles in your Salesforce org, refer to the following table to check wether the changes prevent users from requesting meetings.

Note: In permission sets and the enhanced profile user interface, the setting labels differ from those in the original profile user interface and in field-level security pages for customizing fields.

Object	Field	Required Field-Level Security Settings		Description
		Permission Sets and Enhanced Profile User Interface	Original Profile User Interface and Customize Field Pages	
Event	`Name`	`Read and Edit`	`Visible` (with `Read-Only` *not* selected)	If this field isn't readable, the New Meeting Request button isn't displayed on the Open Activities related list, and an "insufficient privileges" message is displayed when a user tries to change (confirm or reschedule) or view a requested meeting. If this field is readable but not editable, the New Meeting Request button isn't displayed on the Open Activities related list, and requested meetings open as read only, preventing users from confirming or rescheduling the meeting.
	`Description`	`Read`	`Visible`	By default, when a requested meeting is confirmed, the last message sent from the

Object	Field	Required Field-Level Security Settings		Description
		Permission Sets and Enhanced Profile User Interface	**Original Profile User Interface and Customize Field Pages**	
				meeting organizer is displayed in the `Description` field for the new event. However, if field-level security for the `Description` field isn't readable, the last message isn't displayed in the `Description` field, even if field-level security is later set to readable.

IN THIS SECTION:

Guidelines for Adding Custom Logos to Meeting Requests in Salesforce Classic
You can display a custom logo in communications, such as meeting requests. Use these guidelines for custom logo images.

Guidelines for Adding Custom Logos to Meeting Requests in Salesforce Classic

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

USER PERMISSIONS

To customize activity settings:

- "Customize Application"

You can display a custom logo in communications, such as meeting requests. Use these guidelines for custom logo images.

A custom logo appears in the following locations.

- Email requests sent to invitees when you request a meeting or schedule an event
- Meeting response pages where invitees select the times they can meet
- Event response pages where invitees accept or decline the event

When you use a custom logo, keep the following in mind.

- The image must be smaller than 20 KB and formatted as a .gif, .jpeg, or .png file.
- For best results, use an image smaller than 130 pixels wide, 100 pixels high, and 72 pixels per inch. Automatic resizing can prevent larger images from displaying correctly in some email clients.
- Upload your logo to the Documents tab to make it externally available.

  Note:

  - Other users can replace the logo if it's in the Shared Documents folder. To prevent unwanted changes, create a folder accessible only to system administrators and upload the logo to this folder.
  - You can't use a logo that is stored in the My Personal Documents folder or marked Internal Use Only.

- You can't delete a custom logo from the Documents tab when it's being used in meeting requests. Either select another image to use as your logo, or uncheck the option to display a custom logo in meeting requests.

Event Fields

Event records have standard fields for tracking and recording event details.

IN THIS SECTION:

Event Fields in Lightning Experience

These standard fields for tracking and recording event details are available in Lightning Experience.

Event Fields in Salesforce Classic

These standard fields for tracking and recording event details are available in Salesforce Classic.

Event Fields in Lightning Experience

These standard fields for tracking and recording event details are available in Lightning Experience.

EDITIONS

Available in Lightning Experience in: **Developer**, **Enterprise**, **Group**, **Performance**, **Professional**, and **Unlimited** Editions

Field	Description
`Activity Currency`	Indicates the default currency for all currency amount fields in the activity. Amounts are displayed in the activity currency. They are also converted to the user's personal currency. Available only in orgs in which multiple currencies are used.
`All-Day Event`	Selecting this checkbox indicates that the event lasts all day.
`Assigned To`	Indicates the assigned owner of the event. By default, the event is assigned to the user who created it. On an event detail page or list view, `Assigned To` denotes the event creator. However, if an event invitee views a report on Activities with Contacts, `Assigned` denotes the viewer as the invitee. This field isn't available in Personal Edition.
`Created By`	Indicates the user who created the event, including the creation date and time. Read only.
`Date`	Indicates the planned date of the event. This field is displayed only if multiday events are disabled.
`Description`	Description of the event. The limit is 32 KB of data.
`Division`	Indicates the division to which the activity belongs. This value is inherited from the related account, lead, case, or custom object, if any. Otherwise, the activity belongs to the global division. Available only in orgs in which divisions are used to segment data.

Field	Description
`Duration`	Represents the length of an event spanning less than a full day, in hours and minutes. This field appears only if multiday events are disabled.
`Email`	Contains the email address of the contact or lead related to the event. This field is filled in with the value from the related contact or lead record.
`End`	Indicates the planned end date and time of the event. This field appears only if multiday events are enabled.
`Event Record Type`	Contains the name of the field that determines which picklist values are available for the record. Available in Enterprise, Unlimited, Performance, and Developer Editions.
`Last Modified By`	Contains the name of the user who last changed the event, including the modification date and time. Read only.
`Name`	Contains the name of the contact or lead related to the event. If Shared Activities is enabled in your org, a user can relate up to 50 contacts to a non-recurring event. This field is visible only to users with the "Read" permission for contacts and leads. Relating a contact to an event can affect the account to which Salesforce relates the event. See the `Related To` field.
`Location`	Indicates the location of the event.
`Phone`	Contains the phone number of the contact or lead related to the event. This field is filled in with the value from the related contact or lead record.
`Private`	Indicates whether users other than the event owner can see the event details when viewing the event owner's calendar. However, users with the "View All Data" or "Modify All Data" permission can see private event details in reports and searches or when viewing other users' calendars. Exported data files always contain private events. Events with invitees and events being added or changed in another user's calendar can't be marked private. Private events can't be related to other records.
`Public`	Note: Before Summer '13, this field was called `Visible in Self-Service`. This checkbox specifies whether a past event is visible in the Self-Service portal. Note: Starting with Spring '12, the Self-Service portal isn't available for new organizations. Existing organizations continue to have access to the Self-Service portal. If Communities is enabled in your org, the value in this field specifies whether the event is visible to external users in

Field	Description
	communities. If an external user owns the event, that user sees the event in the community regardless of whether the event is marked public. This field is not visible by default. A Salesforce admin can expose it.
`Related To`	Represents the record that the event is related to, such as an account, opportunity, or custom object. This field is available only when a user relates the event to a contact, not to a lead. The record is visible only to users with the "Read" permission for the type of record the event is related to. If you relate the event to an object other than an account, Salesforce determines the account on the event as follows. • If you relate the event to an opportunity, contract, or custom entity that belongs to an account, Salesforce uses that object's account as the account for the event. • If you relate the event to any other kind of object also relate the event to a contact, Salesforce uses the primary contact's account as the account for the event. • If you leave the `Related To` field empty, then Salesforce doesn't relate an account to the event.
`Show Time As`	Determines how the event appears when another user views your calendar: busy, out of office, or free.
`Start`	Planned start date and time of event. This field appears only if multiday events are enabled.
`Subject`	Contains the subject of the event; for example, "Meeting." A user can enter a subject or select from a list of previously defined subjects.
`Time`	Indicates the start time of a planned event. This field appears only if multiday events are disabled.
`Type`	Indicates the event type; for example, email or meeting. Limit for values in the picklist is 40 characters.

Event Fields in Salesforce Classic

These standard fields for tracking and recording event details are available in Salesforce Classic.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Events with invitees not available in: **Personal** Edition

Field	Description
`Activity Currency`	Indicates the default currency for all currency amount fields in the activity. Amounts are displayed in the activity currency. They are also converted to the user's personal currency. Available only in orgs in which multiple currencies are used.
`All-Day Event`	By selecting this checkbox, a user specifies that the event lasts all day.
`Assigned To`	Indicates the assigned owner of the event. By default, the event is assigned to the user who created it. On an event detail page or list view, `Assigned To` denotes the event creator. However, if an event invitee views a report on Activities with Contacts, `Assigned` denotes the viewer as the invitee. This field isn't available in Personal Edition.
`Create Recurring Series of Events`	By selecting this checkbox, a user can set up a series of recurring events.
`Created By`	Indicates the user who created the event, including the creation date and time. Read only.
`Date`	Indicates the planned date of the event. This field is displayed only if multiday events are disabled.
`Description`	Contains a note describing the event. This field holds up to 32 KB of data.
`Division`	Indicates the division to which the activity belongs. This value is automatically inherited from the related account, lead, case, or custom object, if any. Otherwise, the activity belongs to the global division. Available only in orgs in which divisions are used to segment data.
`Duration`	Represents the length of an event spanning less than a full day, in hours and minutes. This field appears only if multiday events are disabled.
`Email`	Contains the email address of the contact or lead related to the event. This field is

Field	Description
	automatically filled in with the value from the related contact or lead record.
`End`	Indicates the planned end date and time of the event. This field appears only if multiday events are enabled.
`Event Record Type`	Contains the name of the field that determines what picklist values are available for the record. Available in Enterprise, Unlimited, Performance, and Developer Editions.
`Last Modified By`	Contains the name of the user who last changed the event, including the modification date and time. Read only.
`Name`	Contains the name of the contact or lead related to the event. If Shared Activities is enabled in your org, a user can relate up to 50 contacts to a non-recurring event. This field is visible only to users with the "Read" permission for contacts and leads. Relating a contact to an event can affect the account to which Salesforce relates the event. See the `Related To` field.
`Location`	Indicates the location of the event.
`Phone`	Contains the phone number of the contact or lead related to the event. This field is automatically filled in with the value from the related contact or lead record.
`Private`	Indicates whether users other than the event owner can see the event details when viewing the event owner's calendar. However, users with the "View All Data" or "Modify All Data" permission can see private event details in reports and searches, or when viewing other users' calendars. Exported data files always contain private events. Events with invitees and events being added or changed in another user's calendar can't be marked private. Private events can't be related to other records.
`Public`	Note: Before Summer '13, this field was called `Visible in Self-Service`. This checkbox specifies whether a past event is visible in the Self-Service portal. Note: Starting with Spring '12, the Self-Service portal isn't available for new organizations. Existing organizations continue to have access to the Self-Service portal. If Communities is enabled in your org, the value in this field specifies whether the event is visible to external users in communities. If an external user owns the event, that user sees the event in the community regardless of whether the event is marked public.

Field	Description
	This field is not visible by default. A Salesforce admin can expose it.
`Related To`	Represents the record that the event is related to, such as an account, an opportunity, or a custom object. This field is available only when a user relates the event to a contact, not to a lead. The record is visible only to users with the "Read" permission for the type of record the event is related to. If you relate the event to an object other than an account, Salesforce determines the account on the event as follows. • If you relate the event to an opportunity, contract, or custom entity that belongs to an account, Salesforce uses that object's account as the account for the event. • If you relate the event to any other kind of object also relate the event to a contact, Salesforce uses the primary contact's account as the account for the event. • If you leave the `Related To` field empty, then Salesforce doesn't relate an account to the event.
`Response`	Optional field; allows users invited to an event to enter a note when they accept or decline the event. This field isn't available in Personal Edition.
`Select Invitees`	Lets you relate up to 1,000 people (invitees) and resources to the event. When you search for people or resources to invite to an event, the Available list displays up to 300 results.
`Show Time As`	Picklist. Determines how the event appears when another user views your calendar: busy, out of office, or free.
`Start`	Planned start date and time of event. This field appears only if multiday events are enabled.
`Subject`	Contains the subject of the event; for example, "Meeting." A user can enter a subject or select from a list of previously defined subjects.
`Time`	Indicates the start time of a planned event. This field appears only if multiday events are disabled.
`Type`	Indicates the event type; for example, email or meeting. Limit for values in the picklist is 40 characters.

Help Your Sales Reps Manage Their Tasks

Optimize the way your sales reps manage their work. Options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

IN THIS SECTION:

Considerations for Customizing the Task List in Lightning Experience

In the task list, you can customize the display and order of fields for individual tasks using task compact layouts. However, even if you remove certain fields from a layout, they remain in the task list because they contain critical task information. For example, suppose that you remove the status and due date fields from a compact layout. The task checkbox and the due date still appear on tasks in the list. The remaining fields visible in the list reflect the fields you include in the compact layout.

Guidelines for Customizing the Task List in Lightning Experience

To customize the action bar next to the task list, use the Salesforce1 and Lightning Experience Actions section of the task page layout.

Considerations for Email Notification of Task Assignments

When the setting **Enable user control over task assignment notifications** is enabled in Activity Settings, users see the option **Email me when someone assigns me a task** in their personal settings. Both the setting and the option are enabled by default. Enabling and disabling the setting affects users in different ways. Before migrating a Salesforce org, avoid excessive email notifications by disabling the setting. You can re-enable it after migration.

Task Fields

Task records have standard fields for tracking and recording task details.

Email Tracking in Salesforce Classic

If you use HTML email templates in Salesforce Classic, enable Salesforce to track outbound HTML emails as a type of completed task. If you disable this option, Salesforce no longer stores email tracking information. However, email tracking reports remain on the Reports tab. To display email statistics to your users, add the HTML Email Status related list to the relevant page layouts.

SEE ALSO:

Customization Options for Tasks

Considerations for Customizing the Task List in Lightning Experience

In the task list, you can customize the display and order of fields for individual tasks using task compact layouts. However, even if you remove certain fields from a layout, they remain in the task list because they contain critical task information. For example, suppose that you remove the status and due date fields from a compact layout. The task checkbox and the due date still appear on tasks in the list. The remaining fields visible in the list reflect the fields you include in the compact layout.

EDITIONS

Available in Lightning Experience in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Guidelines for Customizing the Task List in Lightning Experience

To customize the action bar next to the task list, use the Salesforce1 and Lightning Experience Actions section of the task page layout.

EDITIONS

Available in Lightning Experience in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

SEE ALSO:

Considerations for the Activity Composer and Activity Timeline in Lightning Experience

Considerations for Email Notification of Task Assignments

When the setting **Enable user control over task assignment notifications** is enabled in Activity Settings, users see the option **Email me when someone assigns me a task** in their personal settings. Both the setting and the option are enabled by default. Enabling and disabling the setting affects users in different ways. Before migrating a Salesforce org, avoid excessive email notifications by disabling the setting. You can re-enable it after migration.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Table 1: Effects of Enabling and Disabling the Feature in Setup

User Type	Effects of Enabling the Feature	Effects of Disabling the Feature
Salesforce1 users, including Communities users	In **My Settings** > **Notifications**, the **Assigns you a task** checkbox is displayed.	In **My Settings** > **Notifications**, the **Assigns you a task** checkbox isn't displayed.
Lightning Experience users	In Lightning Experience, the **Email me when someone assigns me a task** checkbox isn't displayed. However, users who have turned on that option in Salesforce Classic still receive email notifications.	No user receives an email notification when another user assigns a task.
Salesforce Classic users, including Communities users	• On the Create Task page, the **Send email notification** and **Make this the default setting** checkboxes aren't displayed. • On the Reminders & Alerts page in the user's personal settings, the **Email me when someone assigns me a task** checkbox is displayed, and it's selected by default.	• On the Create Task page, the **Send email notification** and **Make this the default setting** checkboxes are displayed, and email notifications are sent according to whether the checkboxes are selected. • The **Email me when someone assigns me a task** checkbox isn't displayed.
Partner portal users	• On the Create Task page, the **Send email notification** and **Make this the default setting** checkboxes aren't displayed. • Email notifications are sent whenever someone assigns a task to a user (partner portals have no settings page for admins or users).	On the Create Task page, the **Send email notification** and **Make this the default setting** checkboxes are displayed, and email notifications are sent according to whether the checkboxes are selected.

User Type	Effects of Enabling the Feature	Effects of Disabling the Feature
Users who are assigned tasks that are generated by workflow task rules	• On the New Task page for workflow tasks, the **Notify Assignee** checkbox isn't displayed. • If a Salesforce admin selected the **Notify Assignee** checkbox before Winter '15, task assignees who deselect the option don't receive notifications.	Email notifications are sent to task assignees according to workflow task rules.
Users who are assigned tasks through an API	Use an API to set the `triggerUserEmail` value. The default is false. • If `triggerUserEmail` = true, notifications are sent according to individual users' settings. • If `triggerUserEmail` = false, email notifications aren't sent when a task is assigned.	• If `triggerUserEmail` is true, email notifications are sent to all users when tasks are assigned. • If `triggerUserEmail` is false, email notifications aren't sent when a task is assigned.
Users who are assigned tasks through Apex	Notifications that are sent through Apex are sent in the context of the request header.	If a value in the request header is set so that email notifications are sent, email notifications are sent to users when tasks are assigned. Apex processes the header sequentially from the first line to the last. If a statement in the request header indicates that a task notification is required, an email notification is sent regardless of statements later in the header.

Task Fields

Task records have standard fields for tracking and recording task details.

IN THIS SECTION:

Task Fields in Lightning Experience

These standard fields for tracking and recording task details are available in Lightning Experience.

Task Fields in Salesforce Classic

These standard fields for tracking and recording task details are available in Salesforce Classic.

Task Fields in Lightning Experience

These standard fields for tracking and recording task details are available in Lightning Experience.

EDITIONS

Available in Lightning Experience in: **Developer**, **Enterprise**, **Group**, **Performance**, **Professional**, and **Unlimited** Editions

Field	Description
`Activity Currency`	Indicates the default currency for all currency amount fields in the task. Amounts are displayed in the task currency and are also converted to a user's personal currency. Available only in orgs in which multiple currencies are used.
`Assigned To`	Indicates the assigned owner of a task. By default, the task is assigned to the user who created it. This field isn't available in Personal Edition.
`Call Duration`	Indicates the duration of a call in seconds.
`Call Object Identifier`	Indicates the ID of a call logged in Salesforce through Salesforce computer-telephony integration (CTI) with a third-party telephony system. This field is often populated with the ID stored in the telephony system. Limit is 255 characters.
`Call Result`	Represents the result of a given call; for example, "we'll call back" or "call unsuccessful." Limit is 255 characters. A Salesforce admin can customize the selections in the picklist.
`Call Type`	Indicates the call type: inbound, internal, or outbound. A Salesforce admin can customize the selections in the picklist.
`Comments`	Contains a description of the task. The limit is 32 KB of data. If Spell Checker is enabled in your org, a user can spell-check the contents.
`Created By`	Indicates the user who created the task, along with the task creation date and time. Read only.
`Division`	Indicates the division to which the task belongs. This value is inherited from the related account, lead, case, or custom object, if any. Otherwise, the task belongs to the global division. Available only in orgs in which divisions are used to segment data.
`Due Date`	Indicates the date when the task is due.
`Email`	Contains the email address of the contact or lead associated with the task. This field is filled

Field	Description
	in with the value from the related contact or lead record.
`Last Modified By`	Indicates the user who last changed the task, along with the task modification date and time. This field is read only.
`Name`	Contains the name of the contact or lead related to the task. If Shared Activities is enabled in your org, a user can relate up to 50 contacts to a non-recurring task. This field is visible only to users who have the "Read" permission for contacts and leads. Relating a contact to a task can affect the account to which Salesforce relates the task. See the `Related To` field.
`Phone`	Contains the phone number of the contact or lead related to the task. This field is filled in with the value from the related contact or lead record.
`Priority`	Indicates the urgency of the task; for example, low, medium, or high. A Salesforce admin can customize the selections in the picklist.
`Public`	**Note:** Before Summer '13, this field was called `Visible in Self-Service`. By selecting this checkbox, a user can specify that the completed task is visible in the Self-Service portal. **Note:** Starting with Spring '12, the Self-Service portal isn't available for new organizations. Existing organizations continue to have access to the Self-Service portal. If Communities is enabled in your org, this field specifies whether a task is visible to external users in communities. If an external user owns the task, that user sees the task in the community regardless of whether it's marked Public. This field is not visible by default. A Salesforce admin can make it visible.
`Related To`	Indicates the record that the task is related to, such as an account or an opportunity. This field is available only when a user relates the task to a contact, not to a lead. The record is visible only to users with the "Read" permission for the type of record the task is related to. If a user relates the task to an object other than an account, Salesforce determines the account on the task as follows. • Suppose that a user relates the task to an opportunity, a contract, or a custom entity that belongs to an account. Salesforce uses that object's account as the account for the task.

Field	Description
	• Suppose that a user relates the task to any other object type and also to a contact. Salesforce uses the primary contact's account as the account for the task. • If a user leaves the `Related To` field empty, Salesforce doesn't relate an account to the task.
`Status`	Indicates the status of a task; for example, "not started" or "completed." A Salesforce admin can customize the selections in the picklist.
`Subject`	Contains the subject of a task; for example, "Email quote to customer." A user can enter a subject or select from a picklist of previously defined subjects.
`Task Record Type`	Contains the name of the field that determines which picklist values are available for the record. Available in Enterprise, Unlimited, Performance, and Developer Editions.
`Type`	Indicates the task type; for example, Email or Meeting. Limit for values in the picklist is 40 characters.

Task Fields in Salesforce Classic

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Database.com**

These standard fields for tracking and recording task details are available in Salesforce Classic.

Field	Description
`Activity Currency`	Indicates the default currency for all currency amount fields in the task. Amounts are displayed in the task currency and are also converted to a user's personal currency. Available only in orgs in which multiple currencies are used.
`Assigned To`	Indicates the assigned owner of a task. By default, the task is assigned to the user who created it. This field isn't available in Personal Edition.
`Call Duration`	Indicates the duration of a call in seconds.
`Call Object Identifier`	Indicates the ID of a call logged in Salesforce through Salesforce computer-telephony integration (CTI) with a third-party telephony system. This field is often populated with the ID stored in the telephony system. Limit is 255 characters.
`Call Result`	Represents the result of a given call; for example, "we'll call back" or "call unsuccessful." Limit is

Field	**Description**
	255 characters. A Salesforce admin can customize the selections in the picklist.
`Call Type`	Indicates the call type: inbound, internal, or outbound. A Salesforce admin can customize the selections in the picklist.
`Comments`	Contains a description of the task. The limit is 32 KB of data. If Spell Checker is enabled in your org, a user can spell-check the contents.
`Create Recurring Series of Tasks`	By selecting this checkbox, a user can set up a series of recurring tasks. Enabling this option disables the `Due Date` field, because each task occurrence in a series has a different due date.
`Created By`	Indicates the user who created the task, along with the task creation date and time. Read only.
`Division`	Indicates the division to which the task belongs. This value is inherited from the related account, lead, case, or custom object, if any. Otherwise, the task belongs to the global division. Available only in orgs in which divisions are used to segment data.
`Due Date`	Indicates the date when the task is due.
`Email`	Contains the email address of the contact or lead associated with the task. This field is filled in with the value from the related contact or lead record.
`Last Modified By`	Indicates the user who last changed the task, along with the task modification date and time. This field is read only.
`Name`	Contains the name of the contact or lead related to the task. If Shared Activities is enabled in your org, a user can relate up to 50 contacts to a non-recurring task. This field is visible only to users who have the “Read” permission for contacts and leads. Relating a contact to a task can affect the account to which Salesforce relates the task. See the `Related To` field.
`Phone`	Contains the phone number of the contact or lead related to the task. This field is filled in with the value from the related contact or lead record.
`Priority`	Indicates the urgency of the task; for example, low, medium, or high. A Salesforce admin can customize the selections in the picklist.
`Public`	Note: Before Summer ’13, this field was called `Visible in Self-Service`. By selecting this checkbox, a user can specify that the completed task is visible in the Self-Service portal. Note: Starting with Spring ’12, the Self-Service portal isn’t available for new organizations. Existing organizations continue to have access to the Self-Service portal.

Field	Description
	If Communities is enabled in your org, this field specifies whether a task is visible to external users in communities. If an external user owns the task, that user sees the task in the community regardless of whether it's marked Public. This field is not visible by default. A Salesforce admin can make it visible.
`Related To`	Indicates the record that the task is related to, such as an account or an opportunity. This field is available only when a user relates the task to a contact, not to a lead. The record is visible only to users with the "Read" permission for the type of record the task is related to. If a user relates the task to an object other than an account, Salesforce determines the account on the task as follows. • Suppose that a user relates the task to an opportunity, a contract, or a custom entity that belongs to an account. Salesforce uses that object's account as the account for the task. • Suppose that a user relates the task to any other object type and also to a contact. Salesforce uses the primary contact's account as the account for the task. • If a user leaves the `Related To` field empty, Salesforce doesn't relate an account to the task.
`Status`	Indicates the status of a task; for example, "not started" or "completed." A Salesforce admin can customize the selections in the picklist.
`Subject`	Contains the subject of a task; for example, "Email quote to customer." A user can enter a subject or select from a picklist of previously defined subjects.
`Task Record Type`	Contains the name of the field that determines which picklist values are available for the record. Available in Enterprise, Unlimited, Performance, and Developer Editions.
`Type`	Indicates the task type; for example, Email or Meeting. Limit for values in the picklist is 40 characters.

Email Tracking in Salesforce Classic

If you use HTML email templates in Salesforce Classic, enable Salesforce to track outbound HTML emails as a type of completed task. If you disable this option, Salesforce no longer stores email tracking information. However, email tracking reports remain on the Reports tab. To display email statistics to your users, add the HTML Email Status related list to the relevant page layouts.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Customize Activities for Your Sales Reps

Optimize the way that your sales reps can manage events, calendars, and tasks. Customization options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

IN THIS SECTION:

Customization Options for Managing Events and Tasks Together

Give sales reps a more accurate perspective on their leads, contacts, opportunities, and accounts. Use combined activities settings to help them manage and track meetings and tasks. Options differ for Lightning Experience and Salesforce Classic.

Customization Options for Events and Calendars

Optimize the way your sales reps manage their meetings and scheduling. Options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

Customization Options for Tasks

Optimize the way your sales reps manage their work. Options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

Customization Options for Managing Events and Tasks Together

Give sales reps a more accurate perspective on their leads, contacts, opportunities, and accounts. Use combined activities settings to help them manage and track meetings and tasks. Options differ for Lightning Experience and Salesforce Classic.

Setting or Feature	**Description**	**Setup and Help**	**Lightning Experience**	**Salesforce Classic**	**Salesforce1**
Enable activity reminders	Let users set individual preferences for displaying event and task reminders.	From Setup, enter *`Activity Settings`* in the `Quick Find` box, then select **Enable Activity Reminders**. See also Considerations for Activity Reminder Setup in Salesforce Classic on page 177 and Activity Reminders in Salesforce Classic.		✓	

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
Allow multiple contacts (Shared Activities)	Let users relate up to 50 contacts to an event or a task.	From Setup, enter `Activity Settings` in the `Quick Find` box, then select **Allow users to relate multiple contacts to events and tasks**. See also Considerations for Shared Activities (Multiple Contacts on an Activity) on page 178 and Guidelines for Shared Activities (Multiple Contacts on an Activity) on page 178.	✓	✓	

SEE ALSO:

Customization Options for Events and Calendars

Customization Options for Tasks

Configure the Call, Task, and Event Tabs in the Activity Composer in Lightning Experience

Customization Options for Events and Calendars

Optimize the way your sales reps manage their meetings and scheduling. Options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
Allow multiday events.	Let users create events that end more than one day (24 hours) after they start.	From Setup, enter `Activity Settings` in the `Quick Find` box, then select **Enable Multiday Events**.	✓	✓	✓
Allow recurring events.	Let users create events that repeat at a specified interval. If you disable this setting, users can still edit the interval of an	From Setup, enter `Activity Settings` in the `Quick Find` box, then select **Enable**		✓	

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
	existing recurring event, but they can't create recurring events.	**Creation of Recurring Events**.			
Allow hover links on Home tab calendar.	Display event details when a user hovers the mouse over an event.	From Setup, enter *`User Interface`* in the `Quick Find` box, then select **Enable Home Page Hover Links for Events**.		✓	
Allow drag-and-drop calendar editing.	Let users drag to reschedule events on the day or week view of their own calendars.	From Setup, enter *`User Interface`* in the `Quick Find` box, then select **Enable Drag-and-Drop Editing on Calendar Views**.		✓	
Let users create events by clicking in the calendar.	Let users create an event by clicking a time slot in the calendar.	From Setup, enter *`User Interface`* in the `Quick Find` box, then select **Enable Click-and-Create Events on Calendar Views**.		✓	
Allow drag-and-drop scheduling on list views.	In contact and lead list views, let users schedule events by dragging a contact or lead into the calendar. You can customize the mini page layout for the overlay where users enter event details.	From Setup, enter *`User Interface`* in the `Quick Find` box, then select **Enable Drag-and-Drop Scheduling on List Views**. See also Overview of Page Layouts and Field-Level Security.		✓	
Enable sidebar calendar shortcut.	Display a link (📅) to a user's last-used calendar view in the sidebar above Recent Items.	From Setup, enter *`User Interface`* in the `Quick Find` box, then select **Enable**		✓	

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
		Sidebar Calendar Shortcut.			
Enable hover link for My Tasks list.	Show task details in a popup on the Home tab when a user hovers the mouse over a task.	From Setup, enter `User Interface` in the `Quick Find` box, then select **Enable Hover Links for My Tasks list**.		✓	
Show event details in multiuser calendar view.	Display event details on-screen rather than on hover in daily, weekly, and monthly calendar views for all users. Enabling this setting doesn't override calendar sharing.	From Setup, enter `Activity Settings` in the `Quick Find` box, then select **Show event details on multi-user calendar view**.		✓	
Create public calendars and resource calendars.	Create calendars for managing group activities, such as marketing events, product releases, training classes, and team vacations, or shared resources, such as a conference room.	See Create and Manage a Public Calendar or a Resource Calendar in Salesforce Classic on page 179.		✓	
Set up meeting requests (Cloud Scheduler).	Display a button in the Open Activities related list on contacts, leads, and person accounts that lets users request meetings with customers.	See Set Up Cloud Scheduler in Salesforce Classic on page 180.		✓	
Show Cloud Scheduler meeting requests on the Home tab.	Display the Requested Meetings subtab in the calendar on the Home tab. This subtab lists the meetings that a user	From Setup, enter `Activity Settings` in the `Quick Find` box, then select **Show Requested Meetings in the**		✓	

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
	has requested but aren't confirmed.	**Calendar Section on the Home Tab**.			
Show custom logo in Cloud Scheduler meeting requests.	Display a custom logo in communications, such as meeting requests. Invitees see the logo when you invite them to an event or request a meeting with them.	From Setup, enter *`Activity Settings`* in the `Quick Find` box, then select **Show custom logo in meeting requests**.		✓	

SEE ALSO:

Customization Options for Managing Events and Tasks Together

Customization Options for Tasks

Configure the Call, Task, and Event Tabs in the Activity Composer in Lightning Experience

Customization Options for Tasks

Optimize the way your sales reps manage their work. Options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
Let users choose whether to receive email notifications for task assignments.	Display a setting that lets a user decide whether to receive an email notification when assigned a task.	From Setup, enter *`Activity Settings`* in the `Quick Find` box, then select **Enable user control over task assignment notifications**. See also Considerations for Email Notification of Task Assignments on page 190.	✓	✓	✓
Customize task list actions.	Customize the action bar displayed next to the task list.	See Guidelines for Customizing the Task List in Lightning Experience on page 189.	✓		

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
Allow recurring tasks.	Let users create tasks that repeat at a specified interval. If you disable this setting, users can still edit the interval of an existing recurring task, but they can't create more recurring tasks.	From Setup, enter *`Activity Settings`* in the `Quick Find` box, then select **Enable Creation of Recurring Tasks**.			✓
Let users assign copies of a task.	Let users assign independent copies of a new task to multiple users.	From Setup, enter *`Activity Settings`* in the `Quick Find` box, then select **Enable Group Tasks**.			✓
Show a simpler New Task page in Salesforce1.	Display a New Task page with key task fields first.	From Setup, enter *`Activity Settings`* in the `Quick Find` box, then select **Show simpler New Task form in Salesforce1**.		✓	
Track and display email statistics.	Enable Salesforce to track outbound HTML emails when you use HTML email templates.	From Setup, enter *`Activity Settings`* in the `Quick Find` box, then select **Enable Email Tracking**. See also Email Tracking in Salesforce Classic on page 196.		✓	

SEE ALSO:

Customization Options for Managing Events and Tasks Together

Customization Options for Events and Calendars

Configure the Call, Task, and Event Tabs in the Activity Composer in Lightning Experience

Increase Productivity

Set Up Notes

To let your users take rich text notes, set up Notes, our enhanced note-taking tool.

Consider these items before setting up Notes.

- After Notes is enabled for your organization, new notes are created using Notes. Notes created with the old note-taking tool open in the old note-taking tool.
- If you disable Notes, users can't access notes that were created with Notes.
- Users with a Partner Portal or Customer Portal license can't use Notes, they must use the old note-taking tool instead.

Walk Through It

1. Make sure that the Notes related list is included on your page layouts.
2. Make sure that Notes is enabled. From Setup, enter `Notes Settings` in the `Quick Find` box, then select **Notes Settings**. Then, make sure `Enable Notes` is selected.
3. To let users take notes from the Chatter publisher, the Global Actions menu, and the Salesforce1 action bar, add the **New Note** quick action to Quick Actions in the Salesforce Classic Publisher and Salesforce1 and Lightning Experience Actions sections on the global publisher layout.
4. If you've overridden the global publisher layout on any of your object page layouts, add the **New Note** quick action to your custom layouts, too.
5. To let your users easily take notes in Salesforce1:
   1. Make sure that your users can create tasks from notes in Salesforce1. From Setup, enter `Activity Settings` in the `Quick Find` box, then select **Activity Settings**. Select `Allow Creation of Tasks from Notes`.
   2. Make sure that **Notes** appears in your organization's Salesforce1 navigation menu. From Setup, enter `Navigation` in the `Quick Find` box, select **Salesforce1 Navigation**, and then move **Notes** from the Available list to the Selected list. We recommend putting it above **Smart Search Items**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view page layouts:
- "View Setup"

To edit page layouts:
- "Customize Application"

To customize action layouts and page layouts:
- "Customize Application"

Configure Page Layouts for Notes

If you've been using Salesforce prior to Winter '16, you need to make a few adjustments to your page layouts so that users can view their notes.

1. Make sure you're familiar with how to edit page layouts.
2. Select the object, and then the layout your users use.
3. From the list of page element categories, select **Related Lists**.
4. Drag the Notes related list on to the page where you want it to appear.
   If your users have been using the old note-taking tool, keep the Notes & Attachments related list so that they can access old notes. Notes taken with the enhanced version of Notes appear in the Notes related list.
5. Save the layout, and confirm that you want to overwrite users' related list customizations.
6. Repeat these steps for other objects you use Notes with.

SEE ALSO:

Set Up Notes

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize page layouts:
- "Customize Application"

To view page layouts:
- "View Setup"

Customizing Options for Leads

Setting Up Lead Management

Success in sales starts by building a strong pipeline of leads. A lead is a prospect who is interested in your company.

Using leads can give your sales staff instant access to the latest prospects and ensures that no leads are ever dropped. Successful lead management helps sales and marketing manage the inbound lead process, track lead sources, and analyze return on their marketing investment.

To get started using lead management, from Setup:

- Go to the object management settings for leads. From the fields section, create custom lead fields that track information specific to your company. Also, map your custom lead fields to account, contact, and opportunity fields so that the data gets converted when users convert leads. Edit the `Lead Status` picklist to choose the default status for new and converted leads.
- Enter *`Lead Settings`* in the `Quick Find` box, then select **Lead Settings** to specify your default lead settings.
- Enter *`Assignment Rules`* in the `Quick Find` box, then select **Lead Assignment Rules** to set up lead assignment rules that automatically assign leads.
- Enter *`Web-to-Lead`* in the `Quick Find` box, then select **Web-to-Lead** to automatically capture leads from your website.

To create sales queues for leads or custom objects, from Setup, enter *`Queues`* in the `Quick Find` box, then select **Queues**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Managing Leads

Before your organization begins using leads, you can perform the following setup:

- Customize the default Lead Settings.
- Create lead queues to help manage the distribution of leads.
- Set up lead assignment rules to automatically assign leads.
- Set up Web-to-Lead to automatically capture leads from your website.
- Import your organization's existing leads.
- Create custom lead fields.
- Map custom lead fields to other custom fields for lead conversion.
- Edit the `Lead Status` picklist to choose the default status for new and converted leads.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Define Default Settings for Lead Creation

Optimize lead management features for your sales teams so they can nurture leads efficiently and prevent duplicate records when it's time to convert the leads to contacts, accounts, and opportunities.

1. From Setup, enter *`Lead Settings`* in the `Quick Find` box, then select **Lead Settings**, and then click **Edit**.
2. Define the default lead owner and lead conversion settings.
3. Save your settings.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To change lead settings:
- "Customize Application"

Map Custom Lead Fields for Lead Conversion

Get the most out of records created from the leads your sales teams convert when you map custom lead fields to the fields of records they're converted to.

When sales reps convert qualified leads, the information from the standard lead fields appears in standard fields for contact, account, and opportunity records. If you set up custom lead fields, you specify how that custom information converts to custom fields in accounts, contacts, and opportunities.

1. From the object management settings for leads, go to the fields section, then click **Map Lead Fields**.
2. For each custom lead field, choose a custom account, contact, or opportunity field into which you want the information inserted when you convert a lead.
3. Save your work.

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To map lead fields:
- "Customize Application"

Guidelines for Mapping Custom Lead Fields for Lead Conversion

Learn the best practices for mapping custom lead fields to custom fields in contacts, accounts, and opportunities. Mapping custom fields helps your sales reps retain that important information when they convert qualified leads to track new potential deals.

Make sure to	It's good to know that
Map custom lead fields to other custom fields of the same data type.	Specifically, map numeric lead fields to other numeric fields, or map long text area fields to other long text area fields. Some exceptions include: • You can map between text and picklist fields. But your data truncates if the mapped text field is not large enough to hold the entire lead picklist value. • You can map field types *Text* or *Text Area* to long text area fields. • You can map auto-number fields to field types *Text*, *Text Area*, or *Picklist*. • Do not map custom formula fields to other formula fields or any other type of field.
Map custom lead field types *Number*, *Currency*, or *Percent* to other number, currency, or percent fields of the same length and decimal places.	For example, your lead currency field has a length of 3 and 2 decimal places. Map it to another custom currency field with a length of 3 and 2 decimal places.
Not change data types for custom lead fields	If you change data types for custom fields, Salesforce deletes the lead mappings for those custom fields.

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

SEE ALSO:

Map Custom Lead Fields for Lead Conversion

Web Lead Concepts

Gather information from your company's website and automatically generate up to 500 new leads a day with Web-to-Lead.

If your company already has a form in which prospects enter their contact information, consider creating a jump page where prospects respond to a campaign. With a little extra HTML code, redirect that information to Salesforce to create leads.

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

SEE ALSO:

Define Default Settings for Lead Creation

Guidelines for Setting Up Web-to-Lead

Get Salesforce ready to gather information from your company's website and automatically generate up to 500 new leads a day.

USER PERMISSIONS

To set up Web-to-Lead:
- "Customize Application"

If you want to	Make sure to
Track special lead information that standard fields for Salesforce leads don't accommodate	Create custom lead fields and specify how you want them to map to custom fields for accounts, contacts, and opportunities during lead conversion.
Automatically send prospects email after they've submitted information through your website	Create public email templates. If you plan to set up email response rules to use different email templates depending on the information submitted, create one default template to send when none of your response rules apply.
Set the default status for new and converted leads	Use the `Lead Status` picklist to do so.
Assign leads to sales reps and queues	• Create lead queues if you want to assign leads to queues instead of individual sales reps. • Indicate the default owner of leads that fail to meet the criteria in your assignment rule using Customize Lead Settings. • Determine how web-generated leads get assigned to users or queues by creating a lead assignment rule and activating it. If the rule is inactive, all web-generated leads get assigned to the default owner you specify in Lead Settings.

SEE ALSO:

Web Lead Concepts

Generate Leads from Your Website for Your Sales Teams

Generate Leads from Your Website for Your Sales Teams

Automatically generate up to 500 leads per day with the prospecting data from your company's website visitors. When you set up Web-to-Lead, Salesforce captures prospects who provide contact information. You can also redirect prospects to other Web pages that are critical to campaign success.

1. From Setup, enter *`Web-to-Lead`* in the `Quick Find` box, then select **Web-to-Lead**.
2. Click **Edit** to enable or change Web-to-Lead settings.
3. If you want automate email replies to prospects, select a default response template. If you set up response rules to use different email templates based on the information prospects provide, the default response template is used when no auto-response rules apply. Templates must be marked *Available for Use*.
4. Save your changes.

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up Web-to-Lead:
- "Customize Application"

5. To create a form that captures prospect details on your website, click **Create Web-to-Lead Form**, and then select fields you want to include
6. Select fields to include on your Web-to-Lead form. Use the Add and Remove arrows to move fields between the Available Fields list and the Selected Fields list, and use the Up and Down arrows to change the order of the fields on your form.
   - Select the `Campaign` field.
   - For organizations using multiple currencies, add the `Lead Currency` field if you add currency amount fields, otherwise all amounts will be captured in your corporate currency.
   - Use a custom multi-select picklist to allow potential customers to express interest in several products.
   - For organizations using lead record types, select the `Lead Record Type` field if you want users to select a record type for Web-generated leads.
7. If your organization uses the Translation Workbench or has renamed tabs, select the language for the form labels displayed on your Web-to-Lead form. The source of your Web-to-Lead form is always in your personal language.
8. Specify the complete URL to which users should be directed after they submit their information—for example, your company's home page for a thank you page—and click **Generate**.
9. Copy the generated HTML code and provide it to your company's webmaster to incorporate into your website.
10. Click **Finished**.

To test the Web-to-Lead form, add the line `<input type="hidden" name="debug" value="1">` to your code. This line redirects you to a debugging page when you submit the form. Remove this line before releasing the Web-to-Lead page to your website.

Leads generated from your website are initially marked with the “default status” specified by the `Lead Status` picklist. For Web leads generated as part of a campaign, the member status of the new leads is set to the `Member Status` value specified in the form, or to the “default” member status if the `Member Status` field is not included in the form.

In addition, new leads are marked as “Unread,” and are changed to “Read” when viewed or edited by the lead owner. Users can select the My Unread Leads list view to quickly locate their new leads.

Note: The format for date and currency fields captured online is taken from your organization’s default settings - `Default Locale` and `Currency Locale`.

The daily limit for Web-to-Lead requests is 500. If your organization exceeds its daily Web-to-Lead limit, the Default Lead Creator (specified in the Web-to-Lead setup page) receives an email containing the additional lead information. See How many leads can we capture from our website? for additional information on Web-to-Lead limits.

If a new lead cannot be generated due to errors in your Web-to-Lead setup, Customer Support is notified of the problem so that we can help you correct it.

Salesforce runs field validation rules before creating records submitted via Web-to-Lead and only creates records that have valid values.

All universally required fields must have a value before a record can be created via Web-to-Lead.

Salesforce doesn’t support rich text area (RTA) fields on Web-to-Lead forms. If you use RTA fields on your forms, any information entered in them is saved as plain text when the lead is created.

SEE ALSO:

Guidelines for Setting Up Web-to-Lead

Web Lead Concepts

Customizing Sales Teams

Customizing Opportunity Teams

USER PERMISSIONS	
To enable team selling:	"Customize Application"
To create or change custom fields:	"Customize Application"
To define or change field validation rules:	"Customize Application"
To create workflow rules:	"Customize Application"
To set up team roles:	"Customize Application"
To add a custom button or link:	"Customize Application"
To edit page layouts:	"Customize Application"
To define Apex triggers:	"Author Apex"

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Settings for opportunity teams available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Make opportunity teams work better for your business by customizing opportunity team team roles, page layouts, and more.

Note: Opportunity teams are available in Lightning Experience but you must switch to Salesforce Classic to use some related features, such as opportunity splits, or to access settings for opportunity teams. For more information, review the Lightning Experience limitations for Sales features.

An opportunity team is a set of users that often work together on sales opportunities. A typical opportunity team might include the account manager, the sales representative, and a pre-sales consultant.

When team selling is enabled, you can customize opportunity teams for your organization.

- Create a custom field for the opportunity team that will appear on the Opportunity Team Member page and can be included in opportunity team reports. You can create a maximum of 50 custom fields.

  Note: If you delete a custom field, filters that use the custom field are also deleted, and the result of assignment or escalation rules that rely on the custom field's data might change.

- Define and activate validation rules that opportunity team data must meet before a user can save the record.
- Create workflow rules.
- Define opportunity team roles for your organization.
- Globally replace existing team roles.
- Add a custom button or link to the opportunity team.
- Customize the Opportunity Team Member page layout, adding custom fields, buttons, links, or customizable related lists.
- Edit the Opportunity Team related list properties on each page layout.

  To display opportunity team member information on a parent page, you must link the team member and the parent. For example, to display team member information on the related account detail page, add a custom lookup field called Account to the Opportunity Team editor, and then set this field to the parent account for each opportunity team member.

- Create custom report types for opportunity teams.

- Define and activate Apex code that executes before or after specific data manipulation language (DML) events occur, such as before opportunity team records are inserted into the database, or after records have been deleted.

Note: There are a few limitations for opportunity teams.

- You can't create a look up from an object, such as an account, to an opportunity team member.
- Validation rules and Apex triggers aren't supported when a user adds his or her default opportunity team on an opportunity.

SEE ALSO:

Enabling Team Selling

Enabling Team Selling

Enabling team selling gives your users access to create and use opportunity teams on opportunities. Opportunity teams are available in Lightning Experience but you must switch to Salesforce Classic to access settings for opportunity teams.

1. From Setup, enter *`Opportunity Team Settings`* in the `Quick Find` box, then select **Opportunity Team Settings**.
2. Select `Enable Team Selling`, and click **Save**.
3. Select the opportunity page layouts that will display the new Opportunity Team related list.
4. To ensure that users with customized page layouts see the related list, select `Add to users' customized related lists`.
5. Click **Save**.

When team selling is enabled, you can add custom fields, custom buttons and links, validation rules, workflow rules, and Apex triggers to opportunity teams. You can also edit opportunity team page layouts, create custom report types for opportunity teams, and enable Opportunity Splits.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable team selling:

- "Customize Application"

SEE ALSO:

Customizing Opportunity Teams

Customizing Opportunity Team Roles

Every opportunity team member has a role in that opportunity, like Account Manager or Sales Rep. You can customize the opportunity team roles for your organization.

1. From Setup, enter *`Team Roles`* in the `Quick Find` box, then select **Team Roles**.
2. Edit the picklist values for existing team roles. (If the Opportunity Owner role exists, leave that unchanged; it's needed for opportunity splits.)

   Note: Opportunity teams share roles with account teams. So if you remove an opportunity team role, that role will no longer be listed as an account team role.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up team roles:

- "Customize Application"

SEE ALSO:

Customizing Opportunity Teams

Replace Opportunity Team Roles

Set up roles for opportunity team members that reflect our organization's business process and needs.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up team roles:
- "Customize Application"

> Note: Opportunity teams are available in Lightning Experience but you must switch to Salesforce Classic to customize roles for your sales team. For more information, review the Lightning Experience limitations for Sales features.

If you've changed your opportunity team roles, you can globally update the values in all existing records, replacing the picklist values. From Setup, enter `Replace Team Roles` in the `Quick Find` box, then select **Replace Team Roles**.

If the Opportunity Owner role exists, leave it unchanged; it's needed for opportunity splits.

> Note: Opportunity teams share roles with account teams. If you remove an opportunity team role, it won't be available as an account team role.

SEE ALSO:

Customizing Opportunity Teams

Edit Multi-Line Layouts for Opportunity Teams

You can specify which fields appear on the Opportunity Team Member multi-line page. To view this page, add a new member to an opportunity team.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit multi-line layouts for opportunity teams:
- "Customize Application"

1. From the object management settings for opportunity teams, go to Page Layouts.
2. Next to the name of an opportunity team page layout, click **Edit**.
3. Click **Edit Multi-Line Layout** in the top right corner.
4. Move fields between Available Fields and Selected Fields.
   - To customize which fields display in the layout, select one or more fields in Available Fields and click **Add** or **Remove**.
   - To sort fields in the layout, select one or more fields in Selected Fields and click **Up** or **Down**.
   - To select multiple fields individually, use CTRL+click.
   - To select multiple fields as a group, use SHIFT+click.
5. Click **Save** to apply your changes.

SEE ALSO:

Customizing Opportunity Teams

Disabling Team Selling

Disabling team selling removes all opportunity teams from all opportunities and deletes default opportunity teams. Switch to Salesforce Classic to access settings for opportunity teams.

Note: If Opportunity Splits is enabled, you must disable them before you can disable team selling. Disabling Opportunity Splits permanently deletes all split data from your organization.

1. Delete any custom fields, custom buttons and links, page layouts, validation rules, workflow rules, or Apex triggers that you've added to opportunity teams. You must also delete any custom reports that include opportunity team information and uninstall any Apex packages that use opportunity teams.
2. From Setup, enter *`Opportunity Team Settings`* in the `Quick Find` box, then select **Opportunity Team Settings**.
3. Select `Disable Team Selling` and click **Save**.
4. Select `Yes` at the prompt and click **OK**. All opportunity teams assigned to opportunities and all default opportunity teams are permanently deleted.

Note: You can't disable team selling if team members are referenced in Apex. In Apex code, the `Team Member` field is represented as `OpportunityTeamMember`.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To disable team selling:
- "Customize Application"

SEE ALSO:

Customizing Opportunity Teams

Prerequisites for Enabling Opportunity Splits

Before you enable Opportunity Splits, there are a few conditions to check for and evaluate.

Available time

Enabling Opportunity Splits starts a process that sets up splits on every opportunity in your organization, not just the open ones. Depending on the number of opportunity records you have, this process can take hours. You can still work with Salesforce while the process is ongoing, but a better option may be to start the process at the end of the day and let it run overnight.

Inactive currencies

If your organization has inactive currencies that have been active in the past, chances are you have opportunity records that use those currencies. Those records will still be part of the split enablement process, but the fact that the currency is inactive will cause the process to fail. There are a few things that you can do to help prevent the failure or fix it if it happens.

- Change the inactive currency of the associated opportunity records to an active currency.
- Make the inactive currency active during the splits enablement (you can make it inactive again once the process is complete).
- Delete the opportunities with the inactive currency. This solution works best if your organization has just a few opportunities with an inactive currency and you don't need them for reporting or historical purposes.

Mass operations in progress

If you're running a mass operation, such as Mass Transfer or Mass Reassign Team Member, enabling Opportunity Splits at the same time could cause the enablement to fail. The solution is to make sure any mass operation is complete before you start to enable Opportunity Splits.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions.

Enable Opportunity Splits and Split Types

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable opportunity splits:

- "Customize Application"

Enabling Opportunity Splits changes existing opportunity records in your organization. The process can take time, depending on the number of records, but it makes splits available for every opportunity.

Note: You must enable team selling before you can enable Opportunity Splits.

When you enable Opportunity Splits, a script applies the changes. If your organization contains a lot of opportunities, the script may take several hours to complete. While it's running, you can still perform other tasks in Salesforce. Automated email notifications keep you up to date on the script's status.

Here's how the opportunity record changes when you enable Opportunity Splits:

- The opportunity owner is included on each opportunity team. Because the Opportunity Owner role is essential for splits, you can't remove it.
- If you enable split types that total 100%, new opportunity split records include a default entry for the owner, who initially receives 100% of the split amount. (These additional records require more data storage. To see how this extra storage requirement affects your organization, search for "Monitoring Resources" in the Salesforce Help.)

Note: The script temporarily disables triggers, workflows, and validation rules for opportunity team records, mass reassignment of opportunity team members, and mass transfer of accounts and opportunities.

1. From Setup, enter `Opportunity Splits` in the `Quick Find` box, then select **Settings**.
2. Click **Set up Opportunity Splits**.
3. To better reflect your business process, do any of the following.
    - Rename or deactivate the default Revenue and Overlay splits, which are based on the Opportunity—Amount field. (These default split types can't be deleted.)
    - Click **Add a new split type** to split another currency field, and specify whether splits must total 100% of that field.

    Tip: You can't have more than five split types, including inactive split types. To rename, temporarily deactivate, or permanently delete split types at any time, simply return to the Opportunity Splits setup page and click **Edit Split Types**. Deleting split types will also delete the splits data but deactivating will not.

4. Click **Save**.
5. Select the page layouts to display the Opportunity Splits related list.
6. To ensure that users with customized page layouts see the related list, select `Add to users' customized related lists`.
7. Click **Save**.
8. After Salesforce displays a message indicating that splits are enabled, click **Let users add members to opportunity teams while editing splits** to enable quicker changes to those teams. (When this option is deselected, users must be added to the Opportunity Team before they can be added to an Opportunity Split.)

Tip: To let users include splits in forecasts, see Enable Forecast Types for Collaborative Forecasts.

Create Custom Split Types for Opportunity Splits

Create custom opportunity splits on opportunity currency fields to better reflect your business operations.

Contact Salesforce to have custom split types enabled for your organization.

Note: Changes to opportunity split types are completed by a background process. You'll be notified by email when the process is finished. We recommend not editing any splits on your opportunities until changes are complete.

1. From Setup, enter `Opportunity Splits` in the `Quick Find` box, then select **Settings**, then click **Edit Split Types**.
2. Click **+ Add a new split type**.
3. If you don't want the split type to be visible to users yet, deselect **Active**.
4. Enter a name for the split type. The name is visible to users when the split type active.
5. Select a field to split. You can split most currency fields created on opportunities, including custom currency fields and roll-up summary fields, but not formula currency fields.
6. If you want the splits for this type to total 100%, select **Totals 100%**.

   Credit for team members who are directly responsible for the opportunity should usually total 100%.
7. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Unlimited**, **Performance**, and **Developer** Editions.

USER PERMISSIONS

To create custom split types for opportunities:
- "Customize Application"

Edit Multi-Line Layouts for Opportunity Splits

Customize the fields that Salesforce displays when users edit opportunity splits.

Note: You can't add rich text fields or multi-select picklists to the multi-line layout for opportunity splits. Rich text fields and multi-select picklists can only be edited on the opportunity split detail page.

1. From the object management settings for opportunity splits, go to Page Layouts.
2. Next to the name of a layout, click **Edit**.
3. Click **Edit Multi-Line Layout**in the top-right corner, then add and arrange the fields you want to display.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To edit layouts:
- "Customize Application"
-

Deactivate or Delete Split Types

Temporarily hide split types, or remove them permanently.

Deactivating a split type removes it from the Salesforce interface but keeps the underlying data so you can quickly reactivate it at a later date.

Deleting a split type permanently removes all related data. Typically, you'll delete split types if you've reached the maximum of five and want to replace one type with another. However, you might also delete a little-used split type to reduce storage requirements for your organization.

1. From Setup, enter `Opportunity Splits` in the `Quick Find` box, then select **Settings**.
2. Click **Edit Split Types**
3. Do one of the following, and then click **Save**.
    - To deactivate a split type, deselect the checkbox in the Active column.
    - To delete a split type, click 🗑 in the Delete column. (If your organization contains a lot of opportunities, the script that deletes split types may take several hours.)

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To disable or delete split types:
- "Customize Application"

SEE ALSO:

Disable Opportunity Splits

Enable Opportunity Splits and Split Types

Disable Opportunity Splits

If your organization isn't using them, you can completely disable Opportunity Splits. However, disabling also deletes some types of related data and is a process you can't undo.

If you completely disable Opportunity Splits, here's what happens.

- Splits on all opportunities in your organization are deleted.
- Split reports are deleted.
- Custom reports built using split report templates will still appear in the Reports tab, but you won't be able to access them.

Warning: Disabling Opportunity Splits is irreversible; you won't be able to retrieve lost splits data.

1. From Setup, enter `Opportunity Splits` in the `Quick Find` box, then select **Settings**.
2. Click **Disable Opportunity Splits**.

If your organization contains a lot of opportunities, the script that disables splits may take several hours.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To disable opportunity splits:
- "Customize Application"

Update Team Members on Multiple Records

If your Salesforce org uses account teams or opportunity teams, keep your records up-to-date the easy way. Use the mass team reassignment wizards to add, remove, and replace team members on multiple records at the same time.

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

   The Step 1 page of the wizard appears.

2. Complete the wizard as instructed.
3. Review the number of changed records, and then click **Done** to exit the wizard.

SEE ALSO:

Considerations for Updating Team Members on Multiple Records

Customizing Opportunity Teams

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To mass update team members:

- "Use Team Reassignment Wizards"

Considerations for Updating Team Members on Multiple Records

Before you use a mass team reassignment wizard, consider a few key points.

- If you don't see the **Mass Reassign Account Teams** or **Mass Reassign Opportunity Teams** option in Setup, go to the Accounts or Opportunities page, and then click the option in the Tools section.
- If Opportunity Splits is enabled, and you remove a team member assigned to a split that must total 100%, the removed member's percentage transfers to the opportunity owner. You can't remove the opportunity owner.
- When you're selecting the team members to change in records:
  - For account teams, select the appropriate account, contact, case, and opportunity access.
  - For opportunity teams, select the appropriate opportunity access. Then complete any custom fields that have been defined and added to the opportunity team page layout.

Managing Currencies

Manage Multiple Currencies

Your organization can set up the ability to use multiple currencies in opportunities, forecasts, quotes, reports, and other data.

1. Enable multiple currencies for your organization.
2. To designate your corporate currency, from Setup, enter *`Manage Currencies`* in the `Quick Find` box, then select **Manage Currencies**, and then click **Change Corporate**.
3. To activate more currencies for your organization, click **New** in the Active Currencies related list.
4. To use dated exchange rates, enable advanced currency management.
5. Set conversion rates for new currencies. See Edit Conversion Rates. If you have enabled advanced currency management, see Editing Dated Exchange Rates on page 224.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view currencies:
- "View Setup and Configuration"

To change currencies:
- "Customize Application"

Using Multiple Currencies

International organizations can use multiple currencies in opportunities, forecasts, reports, quotes, and other currency fields. The administrator sets the "corporate currency," which reflects the currency of the corporate headquarters. The administrator also maintains the list of active currencies and their conversion rates relative to the corporate currency. The active currencies represent the countries in which the organization does business. Only active currencies can be used in currency amount fields.

Each user has a personal currency, which is used as the default currency in quotas, forecasts depending on which forecasting version you use, opportunities, quotes, and reports. Users can also create opportunities and enter amounts using other active currencies.

All standard and custom object records with currency fields have a field that specifies the currency to use for all amount fields in that record. (Click **Edit** to display this editable `Currency` field on a record.) For example, you can set the `Account Currency` to "USD-U.S. Dollars" so that the `Annual Revenue` shows in dollars for one of your American accounts. All currency amounts are displayed in the default currency of the record. Administrators can choose whether to also display, in parentheses, the user's personal currency if it is different from the currency of the record. When you change the default currency of a record, currency amounts are not converted. They just display the new currency code.

Note: If your organization uses advanced currency management, the opportunity close date determines which conversion rate to use when displaying currency amounts.

Depending on the forecasting version you have, forecast currency amounts are converted to the user's personal currency. Additionally, for managers, their team's opportunities, forecasts, quotes, and other data are converted and rolled up to the manager's personal currency. The manager can also drill down to see the data in the native currency. All conversion and roll-ups happen automatically.

Amounts in reports are shown in their original currencies, but can be displayed in any active currency. You can change the currency used for report totals by selecting a currency from **Show** > **Currencies**. The default value is your personal currency. For any amount, you can choose to display the Converted column—for example, `Annual Revenue Converted`—which shows amounts in the currency you select.

Custom formula fields are not tied to any particular currency. If the result of a formula field is a currency amount, it displays in the currency of the associated record. This rule is also true for cross-object formulas that reference merge fields with different currencies, and formulas in workflow rules and approval processes. However, workflow rules and approval processes that use filters instead of formulas convert all currency values to the corporate currency.

If currency fields are referenced in Apex, you can't disable multiple currencies for your organization. For example, if Apex code references the `Account Currency` field (represented as `CurrencyIsoCode` in the code), you can't disable multiple currencies.

SEE ALSO:

Enable Multiple Currencies

Enable Multiple Currencies

EDITIONS

Available in: Salesforce Classic

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

To enable multiple currencies in your organization:

1. Familiarize yourself with the implications of enabling multiple currencies.
2. In Setup, enter *`Company Information`* in the `Quick Find` box, then select **Company Information** and click **Edit**. Ensure that your selected currency locale is the default currency that you want to use for current and future records. Enable **Allow Support to Activate Multiple Currencies**, and then save your changes.

   Note: This setting is used to verify the specific organization that's approved for multi-currency activation. It doesn't submit a request to Salesforce. Submit the request via your normal support process.

3. To enable multiple currencies, contact Salesforce. Be prepared to provide the following information.
   - The organization ID (production or sandbox)
   - Confirmation that you understand that your current currency locale will become the default currency stamp for current and future records (USD, EUR, GBP, and so on)
   - Confirmation that you understand that multiple currencies can't be disabled once enabled
   - Confirmation that you're a system administrator authorized on behalf of your organization to request multi-currency enablement
   - Confirmation that you consent to the lockout of this organization for a certain period, depending on your organization's data usage volume

   Note: For large organizations, multiple currencies are sometimes enabled over the weekend to avoid performance issues during the work week.

SEE ALSO:

Implications of Enabling Multiple Currencies

Manage Multiple Currencies

About Advanced Currency Management

Implications of Enabling Multiple Currencies

EDITIONS

Available in: Salesforce Classic

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

Enabling multiple currencies introduces permanent changes in your organization. Before proceeding, be aware of these implications to ensure a smooth transition for your organization.

- After enabled, multiple currencies can't be disabled for your organization.
- Work with your Salesforce representative to determine the best time for multi-currency enablement. The enablement process temporarily locks your organization, preventing all integration processing and user logins. The lockout duration depends on the data space used by your organization.
- Upon enablement, existing records are stamped with a default currency code that you provide in your enablement request. For example, if your organization contains records using USD and EUR, switch them all to the same default currency before enablement. Support for this type of conversion is also available as a Salesforce paid implementation service.
- Standard and custom objects, such as Account, Lead, Case, Opportunities, Opportunity Products, Opportunity Product Schedules, and Campaign Opportunities, have currency fields that support multiple currencies. Reports related to these objects and fields also support multiple currencies. By default, page layouts for these objects have multi-currency-compatible fields in which you can specify the currency for the record. Typically, these fields are available only when creating a record or editing an existing record. The selected currency is used for the primary amount field.
- After enablement, the primary currency displays as usual and, optionally, a secondary currency amount appears in parentheses. The primary currency is typically the default corporate currency, unless it's overridden at the record level. The amount shown in parentheses is the user's personal default currency, calculated based on the conversion rate settings defined in your organization. To control whether the converted currency amount appears, enable or disable parenthetical currency conversion from the Manage Currencies page.
- In reports, the primary currency reflects either the default corporate currency or the currency selected for the record. The secondary currency reflects the personal default currency of the user running the report, or the currency specified in the report criteria.
- Users can specify a personal default currency on their personal information page. If parenthetical currency conversion is enabled, the personal default currency displays as the secondary currency amount (converted amount). Changing the personal default currency updates the converted amount in real time.
- After a currency is added to an organization's list of supported currencies, it can't be deleted from the administrator's list of currencies, even when it's deactivated. The presence of inactive currencies in the administrator's list is a cosmetic issue that doesn't affect end users. A deactivated currency isn't visible to end users, but remains visible to administrators. Salesforce recommends that you keep this issue in mind during testing and use only those currencies that you eventually plan to use in your organization.
- After enablement, all currency fields display the ISO code of the currency before the amount. For example, $100 displays as USD 100.

  Note: If you have only one currency in your multi-currency organization, you can set a preference to display currency symbols instead of ISO codes. To display currency symbols, search Setup for `User Interface`, and then select **Show currency symbols instead of ISO codes** in the Currency Display Settings section of the User Interface settings page. If you later enable more currencies in your organization, ISO codes display and this preference is no longer available. This preference applies only in the standard Salesforce user interface.

- By default, all converted amounts in your organization rely on the current conversion rates defined for your organization. Conversion rates must be set and updated manually. Changing the exchange rate automatically updates converted amounts on all records, including on closed opportunities.

  You can opt to use dated exchange rates by using advanced currency management to track historical exchange rates. Advanced currency management allows you to maintain a list of exchange rates by date range. Converted currency amounts on opportunities display based on the specified Close Date, regardless of the opportunity stage. If the Close Date changes to a different exchange rate period, changing the Close Date impacts converted amounts.

Note: Dated exchange rates aren't used in forecasting, currency fields in other objects, or currency fields in other types of reports.

SEE ALSO:

Enable Multiple Currencies

Manage Multiple Currencies

About Advanced Currency Management

Activate and Deactivate Currencies

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view currencies:
- "View Setup and Configuration"

To change currencies:
- "Customize Application"

For orgs with multiple currencies, specify which currencies are supported by activating or deactivating currencies.

- **Active currencies** represent countries in which your org does business. Only active currencies can be entered in opportunities, forecasts, and other items. Once you activate a currency, you can never permanently delete it.
- **Inactive currencies** are currencies that your org no longer uses. You can have existing records that use inactive currencies, but you can't enter new amounts that use inactive currencies.

To activate new currencies:

1. From Setup, enter *`Manage Currencies`* in the `Quick Find` box, then select **Manage Currencies**.
2. Click **New** in the Active Currencies related list.
3. Select a currency. Currencies are alphabetized using their ISO currency code.
4. Enter the conversion rate relative to your corporate currency.
5. Specify the number of decimal places to display for amounts in this currency.
6. Click **Save**.

To activate a currency from the list of inactive currencies, click **Activate** next to the currency.

To deactivate a currency, click **Deactivate** next to the currency. You can't deactivate the corporate currency. Deactivating a currency does not alter amounts in items that use that currency. However, you can no longer enter new amounts using the inactive currency.

Note: Deactivating a currency that is set as a user's personal currency automatically resets the user's currency to the corporate currency.

SEE ALSO:

Manage Multiple Currencies

Edit Conversion Rates

About Advanced Currency Management

About Advanced Currency Management

Advanced currency management allows you to manage dated exchange rates within opportunities using Salesforce. Dated exchange rates allow you to map a conversion rate to a specific date range. For example, the exchange rate on January 1 was 1 USD to 1.39 AUD, but on February 1, it changed to 1 USD to 1.42 AUD. Your opportunities that closed between January 1 and February 1 use the first exchange rate (1 = 1.39), while opportunities that closed after February 1 used the second exchange rate (1 = 1.42).

Dated exchange rates are defined using a start date and a conversion rate. Each rate is in effect until either the end of time or the day before the next start date for that currency. The time between one start date and the next start date is called the exchange rate date range. These ranges can be as small as a day and as large as all of time.

To enable or disable advanced currency management, see Enabling or Disabling Advanced Currency Management on page 222.

When advanced currency management is first enabled, your existing exchange rates automatically become the first set of dated exchange rates. These rates will be valid for all time, until you define another set of exchange rates. For more information, see Editing Dated Exchange Rates on page 224.

If you disable advanced currency management, all currency conversions will use the static conversion rate. See Edit Conversion Rates on page 223.

Note: Although dated exchange rates aren't supported in Lightning Experience or Salesforce1, some limited functionality is available. Opportunities display the correct amount if the CloseDate field is on the page layout for opportunities. Because page layouts control who sees what on object records, only users who have this page layout assigned to them see the correct amount. Otherwise, the amount shown reflects the original amount before a dated exchange rate was applied.

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable advanced currency management:
- "Customize Application"

To view currencies:
- "View Setup and Configuration"

To change currencies:
- "Customize Application"

Advanced Currency Management Considerations

- Dated exchange rates are used for opportunities, opportunity products, opportunity product schedules, campaign opportunity fields, opportunity splits, and reports related to these objects and fields. Dated exchange rates are not used in forecasting, currency fields in other objects, or currency fields in other types of reports.
- Organizations with advanced currency management support roll-up summary fields between two advanced currency management objects. For example, roll-up summary fields are supported from an opportunity line object to its opportunity object, because both are advanced currency management enabled. However, if you enable advanced currency management, you can't create roll-up summary fields that calculate currency on the opportunity object rolling up to the account object, and you can't filter on the opportunity currency field on the account object. All existing currency-related roll-up summary fields on the opportunity object are disabled and their values are no longer calculated. If your organization enables advanced currency management, you should delete any currency roll-up summary fields using opportunities and accounts or opportunities and custom objects.
- Campaign opportunity fields use dated exchange rates when calculating the amount in the campaign currency, but are not used when converting those amounts to the user currency.
- Cross-object formulas always use the static conversion rate for currency conversion.

- If advanced currency management is enabled, you can't bind Visualforce pages that use `<apex:inputField>` or `<apex:outputField>` components to currency fields that support advanced currency management.

SEE ALSO:

Manage Multiple Currencies

Activate and Deactivate Currencies

Enabling or Disabling Advanced Currency Management

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To enable advanced currency management:

- "Customize Application"

To enable advanced currency management:

1. Enable multiple currencies for your organization. For more information, see Manage Multiple Currencies on page 217.
2. From Setup, enter *`Manage Currencies`* in the `Quick Find` box, then select **Manage Currencies**.
3. Click **Enable**.
4. When prompted, select `Yes, I want to enable Advanced Currency Management` and click **Enable**.

When advanced currency management is first enabled, your existing exchange rates automatically become the first set of dated exchange rates. These rates will be valid for all time, until you define another set of exchange rates.

To disable advanced currency management:

1. From Setup, enter *`Manage Currencies`* in the `Quick Find` box, then select **Manage Currencies**.
2. Click **Disable**.
3. When prompted, select `Yes, I want to disable Advanced Currency Management` and click **Disable**.

If you disable advanced currency management, all currency conversions will use the static conversion rate. See Edit Conversion Rates on page 223.

When advanced currency management is enabled, Visualforce `<apex:inputField>` and `<apex:outputField>` components cannot display currency fields.

SEE ALSO:

About Advanced Currency Management

Edit Conversion Rates

You can manage static exchange rates between your active and inactive currencies and the corporate currency by editing the conversion rates. These exchange rates apply to all currency fields used in your organization. In addition to these conversion rates, some organizations use dated exchange rates for opportunities and opportunity products.

1. Search Setup for Manage Currencies.
2. If you use advanced currency management, click **Manage Currencies**.
3. In the Active Currencies or Inactive Currencies list, click **Edit Rates**.
4. Enter the conversion rate between each currency and your corporate currency.
5. Click **Save**.

When you change the conversion rates, currency amounts are updated using the new rates. Previous conversion rates are not stored. All conversions within opportunities, forecasts, and other amounts use the current conversion rate.

If your organization uses advanced currency management, you can also manage dated exchange rates for currency fields on opportunities and opportunity products.

Note:

- You cannot track revenue gain or loss based on currency fluctuations.
- Changing conversion rates causes a mass recalculation of roll-up summary fields. This recalculation can take up to 30 minutes, depending on the number of records affected.
- You can also change a conversion rate via the API. However, if another roll-up summary recalculation for the same currency field is in progress, the age of that job affects the recalculation job that you triggered. Here's what happens when you request a currency rate change via the API, and a related job is in progress.
  - If the other recalculation for the same currency field was kicked off less than 24 hours ago, your currency rate change isn't saved. You can try again later or instead change the currency rate from Manage Currencies in Setup. Initiating the change from Setup stops the old job and triggers your recalculation to run.
  - If the other recalculation job was kicked off more than 24 hours ago, you can save your currency rate change and your job starts.

To check the status of your recalculation job, see the Background Jobs page in Setup.

SEE ALSO:

Manage Multiple Currencies

Activate and Deactivate Currencies

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view currencies:
- "View Setup and Configuration"

To change currencies:
- "Customize Application"

Editing Dated Exchange Rates

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view currencies:
- "View Setup and Configuration"

To change currencies:
- "Customize Application"

To add new dated exchange rates:

1. From Setup, enter `Manage Currencies` in the `Quick Find` box, then select **Manage Currencies**.
2. Click **Manage Dated Exchange Rates**.
3. Click **New Exchange Rates**.
4. Enter the date that the exchange rates go into effect.
5. Enter the exchange rates.

   Note: The exchange rates will default to the current exchange rate. If you do not want to set a new exchange rate for a currency, delete the exchange rate (leave the field blank).

6. Click **Save** to save the new dated exchange rates.

To view existing dated exchange rates:

1. From Setup, enter `Manage Currencies` in the `Quick Find` box, then select **Manage Currencies**.
2. Click **Manage Dated Exchange Rates**.
3. Select the date range you want to view either by entering the date and clicking **Go!**, or by selecting **Previous Range** or **Next Range**.

To delete a dated exchange rate for a particular currency:

1. From Setup, enter `Manage Currencies` in the `Quick Find` box, then select **Manage Currencies**.
2. Click **Manage Dated Exchange Rates**.
3. Click the name of the currency you want to edit.
4. Click **Del** for the date range you want to delete.

   If the date range you want is not displayed, enter it in the `Show all rates with start dates between` fields and click **Go!**.

To edit your dated exchange rates for a particular currency:

1. From Setup, enter `Manage Currencies` in the `Quick Find` box, then select **Manage Currencies**.
2. Click **Manage Dated Exchange Rates**.
3. Click the name of the currency you want to edit.
4. Click **Edit** for the date range you want to edit. If the date range you want is not displayed, enter it in the `Show all rates with start dates between` fields and click **Go!**.
5. Edit the exchange rate, setting it to the new value for the date range, and click **Save**.

SEE ALSO:

About Advanced Currency Management

Manage Multiple Currencies

Activate and Deactivate Currencies

Enabling and Customizing Quotes

Enable Quotes

Make it easy for your sales reps to show your customers the prices of the products and services that your company offers.

1. From Setup, enter `Quotes Settings` in the `Quick Find` box, then select **Quotes Settings**.
2. Select `Enable Quotes`.
3. Save your changes.
4. To display the Quotes related list on the standard opportunity page layout, select `Opportunity Layout`.
5. To add the Quotes related list to all opportunity page layouts that users have customized, select `Append to users' personal related list customization`.
6. Save your changes.

Note: You can't disable the Quotes feature if:

- Your records have any references to quotes, quote line items, or quote PDFs from any application customizations, including formula fields, triggers, workflow rules, and approval processes. Remove these references before you try to disable the feature.
- Any quote is synced with an opportunity. On each synced quote's detail page, choose to stop syncing before you try to disable the feature.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable or disable quotes:
- "Customize Application"

Quote Templates

Quote templates let you customize the way your sales reps quote your company's products and services. Sales reps can select standard or customized quote templates from their quote records, generate quote PDFs, and email them to customers.

EDITIONS

Available in: Salesforce Classic

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

IN THIS SECTION:

Considerations for Creating Quote Templates

Before you create a quote template, consider a few key points.

Create, Preview, and Activate Quote Templates

Define the look of your company's quote PDFs by creating templates that your sales reps can choose when they create quote PDFs.

Enhance Quote Templates

After you create a quote template, add features to enhance it.

Considerations for Creating Quote Templates

EDITIONS

Available in: Salesforce Classic

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

Before you create a quote template, consider a few key points.

- Quote PDFs don't support right-to-left languages. The text aligns to the left side of the page.
- Text formatting isn't available in the `Text/Image Field` for Unicode languages such as Arabic and Japanese. To make these languages visible in plain text, contact Salesforce and ask to enable the feature for foreign character support for rich text area fields in Quote PDFs.
- Advanced Currency Management isn't available with quotes.
- The maximum number of characters that you can use in the quotes template `Text/Image Field` is 32,000. This number includes the hidden HTML characters that are used to format text.
- Sometimes a field doesn't appear on the quote templates palette or on a PDF that's created from a template.
  - If the default value for the field exceeds 255 characters, quote templates can't include text areas or text fields.
  - If a user can't view or update a field because of field-level security settings, that field doesn't appear on PDFs that are created from a template, even if the template includes that field. Read-only fields appear on PDFs.
  - Fields that appear on a quote page layout but don't contain data for a given quote appear on the quote templates palette but not when a PDF is created.
  - Quote line item fields that don't contain data don't appear as columns in a list when a PDF is created, even if the template includes that field. For example, if no quote line items offer a discount, the `Discount` column doesn't appear, even if the list includes the `Discount` field.
  - If a related list isn't included on a quote page layout, it doesn't appear on the template palette or any PDFs for quotes that use that page layout.
  - If the currency of a product on an opportunity differs from the user's currency in a multicurrency org, currency fields for quotes and quote line items appear in both currencies. The product's currency is converted to the user's currency, and the converted amount appears in parentheses. Fields in quote custom reports appear in the report's currency. Currency fields include `Subtotal`, `Tax`, and `Grand Total`.
  - If you create a Developer or Developer Pro sandbox for your Salesforce org, templates that contain `Text/Image` fields can't be opened for editing within the sandbox.
- Fields within sections have different alignment than columns within lists, so if you place a totals section below a list, its field values won't align directly below the right-hand list values. For example, say your template includes a list of quote line items, including a Total Price column at the far right that shows the total for each line item. If you add a totals section beneath the list, and you include `Subtotal`, `Total Price`, and `Grand Total` fields, their values will show the total of all line items, but the amounts won't align directly below the list's Total Price column.

SEE ALSO:

Create, Preview, and Activate Quote Templates

Create, Preview, and Activate Quote Templates

Define the look of your company's quote PDFs by creating templates that your sales reps can choose when they create quote PDFs.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create quote templates:
- "Customize Application"

To view quote templates:
- "View Setup and Configuration"

1. From Setup, enter `Templates` in the `Quick Find` box, then select **Templates** under Quotes.
2. Click **New**, and then select a template, such as `Standard Template`, on which to base your new template.
3. Give your new template a name, and then click **Save**.
4. In the template editor, drag the elements that you want to the template, and then complete the details. To add:
   - One or more Quote fields or fields from related objects, use a section and add fields to it.
   - Text that you can edit and format, such as terms and conditions, use `Text/Image Field`.
   - An image, such as your company logo, use `Text/Image Field`.
   - A table of Quote fields or fields from a different object, such as Quote Line Item, use a list.
5. Click **Quick Save** to save your changes and continue working on the template.
6. Click **Save and Preview** to make sure that the quote PDFs that users create will look the way you want them to.

   Preview shows templates in system administrator profile view. The preview and the template show the rich text and images that you've added. Other data is simulated.

   Important: **Save and Preview** saves changes to your template, so after you preview, you can't undo them.
7. Click **Save** when you're finished.
8. Return to the Quote Templates page, and then click `Activate`.

SEE ALSO:

Enhance Quote Templates

Quote Template Fields

Enhance Quote Templates

After you create a quote template, add features to enhance it.

EDITIONS

Available in: Salesforce Classic

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

IN THIS SECTION:

Add Rich Text to a Quote Template

Include text that you can format, such as your company's address or terms and conditions, in your quote template's body, header, or footer.

Add a List to a Quote Template

Arrange and display fields from a quote line item or any other standard or custom object that has a lookup relationship to the quote object. The added list looks like a table, with field names appearing as columns.

Add an Image to a Quote Template

Show an image, such as your company logo, in your quote template's body, header, or footer.

Add a Totals Section to a Quote Template

Include subtotal and grand total amounts for your quote.

Add a Signature Block to a Quote Template

Create signature and date lines so that customers can easily sign off on their quotes.

Guidelines for Using the Quote Templates Editor

While you're creating and editing quote templates, refer to key guidelines for additional information.

Add Rich Text to a Quote Template

Include text that you can format, such as your company's address or terms and conditions, in your quote template's body, header, or footer.

1. Drag `Text/Image Field` into place in the header, the footer, or any section in the body.
2. Type or paste your text into the field.
3. Format the text as needed.
4. Click **OK**.

SEE ALSO:

Guidelines for Using the Quote Templates Editor

Add an Image to a Quote Template

Enhance Quote Templates

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create quote templates:
- "Customize Application"

To view quote templates:
- "View Setup and Configuration"

Add a List to a Quote Template

Arrange and display fields from a quote line item or any other standard or custom object that has a lookup relationship to the quote object. The added list looks like a table, with field names appearing as columns.

A list can include up to 10 fields.

Note: You can't add lists to the header or footer of your quote template.

1. Drag a list from the palette to the template.
2. Enter a title for the list. To suppress the title from appearing on the template or PDF, select **Hide Title**.
3. In the `Object` field, select the object whose fields you want to appear in the list.
4. Use the **Add** and **Remove** arrows to move columns from the Available Fields list to the Selected Fields list. Use the **Up** and **Down** arrows to change the order of the columns.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create quote templates:
- "Customize Application"

To view quote templates:
- "View Setup and Configuration"

5. Click **OK**.

SEE ALSO:

Guidelines for Using the Quote Templates Editor

Enhance Quote Templates

Add an Image to a Quote Template

Show an image, such as your company logo, in your quote template's body, header, or footer.

Before you begin, review key considerations.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create quote templates:
- "Customize Application"

To view quote templates:
- "View Setup and Configuration"

Insert an Uploaded Image

1. To use an image that's stored in Salesforce CRM Content, locate the image, and then download it to your local file directory.
2. Drag `Text/Image Field` into place in the header, the footer, or any section in the body.
3. Click the image icon, click **Choose File**, and then select the image in your file directory.
4. Click **Open** and then **Insert**.

   The image appears in the field. To resize it, drag the sizing handles, which show the image's height and width in pixels.

5. Click **OK**.
6. Click **Save and Preview** to see how the image will look in PDFs that are created from the template.
7. To suppress the title from appearing on the template or PDF, select **Hide Title** in Section Properties.

Insert an Image from a Salesforce Web Address

1. If you need to, upload the image to the Documents tab, or define a static resource.
2. Drag `Text/Image Field` into place in the header, the footer, or any section in the body.
3. To suppress the title from appearing on the template or PDF, select **Hide Title**.
4. Click **OK**.
5. On the Documents tab or the Static Resources page, open the image's detail page, click **View File**, and then copy its URL.
6. In the quote template editor, click 🔧 in the title bar of `Text/Image Field`.
7. Click the image icon, and then click the Web Address tab.
8. Paste the URL into the URL field, and then click **Insert**.

   The image appears in the field. You can resize it by dragging the sizing handles, which show the image's height and width in pixels.

9. Click **OK**.
10. Click **Save and Preview** to see how the image will look in PDFs that are created from the template.

Important: If the image is removed from the Documents tab or Static Resources page where it's stored, the template displays a message that the image isn't available. Restore the image, open the template, delete the error message image, and then paste the URL again.

SEE ALSO:

Guidelines for Using the Quote Templates Editor

Enhance Quote Templates

Add a Totals Section to a Quote Template

Include subtotal and grand total amounts for your quote.

1. Do either of the following.
   a. Select *`Standard Template`* when you create a template, and then modify the totals section as needed.
   b. Drag a section onto the layout of any template, and then drag total-related fields (such as `Subtotal` and `Grand Total`) to the right half of the section. If you're placing the section directly below a list, hide the title.
2. Click 🔧, and then select right field alignment.
3. Save your changes.

SEE ALSO:

Guidelines for Using the Quote Templates Editor

Enhance Quote Templates

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create quote templates:
- "Customize Application"

To view quote templates:
- "View Setup and Configuration"

Add a Signature Block to a Quote Template

Create signature and date lines so that customers can easily sign off on their quotes.

1. Drag `Text/Image Field` into the footer of your template. To right-align your signature block, or to create two signature blocks, use two columns.
2. Enter a label for each line that you want to create. For example, enter *`Signature`*, *`Name`*, *`Title`*, or *`Date`*.
3. To create a line where the customer can sign or write other information, press and hold the underscore key.
4. Click **OK**.
5. Save your changes.

SEE ALSO:

Guidelines for Using the Quote Templates Editor

Enhance Quote Templates

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create quote templates:
- "Customize Application"

To view quote templates:
- "View Setup and Configuration"

Guidelines for Using the Quote Templates Editor

While you're creating and editing quote templates, refer to key guidelines for additional information.

EDITIONS

Available in: Salesforce Classic

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

General Guidelines

- Click ▲ beneath the palette at the top to expand or collapse it.
- In the left column, select an object to display its fields on the palette.
- Use `Quick Find` to easily locate items on the palette.
- To add an element to the template, drag it from the palette to the layout below.
- To remove an element from the layout, drag it back to the palette, or hover over its title bar and click ⊖.
- For any section (including a header or footer), double-click its title bar or click 🔧 to:
  - Hide the section title.
  - Hide field labels. (Field names appear in gray in the quote template editor, but they don't appear on quote PDFs.)
  - Change the number of columns (one or two).
  - Adjust field alignment.
- To rename the template, click **Quote Template Properties**.
- To show field content without labels in quote template sections, headers, and footers, click 🔧, and then select the `Hide` checkbox.
- Use the `Blank Space` field to add vertical space anywhere on the template.

Guidelines for Using Headers and Footers

A header or footer is essentially a section. You can add fields to it and show or hide its title. You can't remove a header or footer or add more sections to it.

- In the quote template editor, select an object, and then drag the fields that you want to the header or footer.
- To use an image, such as your company logo, or include extended information, such as terms and conditions, use `Text/Image Field`.
- To change the number of columns in your header or footer, click 🔧, and then select the number (one or two) that you want.
  - To display an image that spans the width of a page, use a one-column header or footer.
  - For terms and conditions text, use a one-column footer.
- To change field alignment within a column, click 🔧, and then select left or right alignment.
- To hide field labels, click 🔧, and then select the `Hide` checkbox.

SEE ALSO:

Enhance Quote Templates

Quote Template Fields

If you're working with quote templates, review details about quote template fields.

EDITIONS

Available in: Salesforce Classic

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

Note: To help you understand the information that you'll get when you select fields for your template, the Template Field Name column in the following table provides additional information that doesn't appear on PDFs that are created from the template.

Object	Object Field	Template Field Name	PDF Field Name
User	`First Name, Last Name`	`Prepared By (Name)`	`Prepared By`
User	`Email`	`Prepared By (Email)`	`E-mail`
User	`Phone`	`Prepared By (Phone)`	`Phone`
User	`Fax`	`Prepared By (Fax)`	`Fax`
Company Information	`Address`	`Organization (Address)`	`Company Address`
Quote Documents	Hidden. The date when the PDF was generated and saved in the quote documents object.	`Quote PDF (Created Date)`	`Created Date`

SEE ALSO:

Create, Preview, and Activate Quote Templates

Considerations for Adding Images to Quote Templates

Before you add images to quote templates, consider a few key points.

EDITIONS

Available in: Salesforce Classic

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

- You can store images for uploading in your file system or in Salesforce CRM Content.
- If you store images on the Documents tab or the Static Resources page, you get a web address that you can use to insert the image.
- If you insert an image that's too large, it will be cropped when users create quote PDFs from the template. To prevent cropping, click **Save and Preview** after you insert an image, and then resize the image as needed.
- To insert an image from a *public* web address outside the Salesforce application (such as your company's website), contact Salesforce and ask to have the public URL whitelisted for your Salesforce org.

SEE ALSO:

Add an Image to a Quote Template

Quotes Fields

If you're troubleshooting quotes or working with custom fields, review the details about quote fields.

These tables list the fields that make up a quote. Your page layout, field-level security settings, and Salesforce edition determine what fields are visible and editable. (Field-level security is available in Enterprise, Unlimited, Performance, and Developer Editions.)

Note: If the currency of a product on an opportunity differs from the user's currency in a multicurrency org, currency fields for quotes and quote line items appear in both currencies. The product's currency is converted to the user's currency, and the converted amount appears in parentheses. Fields in quote custom reports appear in the report's currency. Currency fields include `Subtotal`, `Tax`, and `Grand Total`.

EDITIONS

Available in: Salesforce Classic

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

Field	Description
`Account Name`	The name of the account that the quote's opportunity is linked to. (Read only.)
`Additional To`	Another address field. By default not displayed on the page layout.
`Additional To Name`	The name of the person or company that's associated with the additional address.
`Bill To`	The billing address for the account that's associated with the quote.
`Bill To Name`	The name of the person or company that the quote is billed to.
`Contact Name`	The name of the contact that's associated with the quote. By default, this contact is the primary contact on the opportunity.
`Contract`	The contract that's associated with the quote.
`Created By`	The user who created the quote, including the creation date and time. (Read only.)
`Description`	The description of the quote, or notes to help you differentiate between quote versions.
`Discount`	The weighted average of all line item discounts on the quote. Can be any positive number up to 100. (Read only.)
`Email`	The email address of the contact who's associated with the quote. If available, automatically completed when you add a contact.
`Expiration Date`	The date when this quote is no longer valid.
`Fax`	The fax number for the contact who's associated with the quote. If available, automatically completed when you add a contact.
`Grand Total`	The total price of the quote plus shipping and taxes. (Read only.)
`Last Modified By`	The user who most recently changed the quote, including the modify date and time. (Read only.)
`Line Items`	The number of line items on the quote.
`Opportunity Name`	The name of the opportunity that's associated with the quote. (Read only.)

Field	Description
`Phone`	The phone number of the contact who's associated with the quote. If available, automatically completed when you add a contact.
`Quote Name`	The quote's name.
`Quote Number`	A system-generated number that identifies the quote. (Read only.)
`Quote To`	The address to send the quote to for approval, such as the address of a third-party agency that represents a buyer. By default not displayed on the page layout.
`Quote To Name`	The name of the entity (such as a person or business) that the quote is sent to for approval.
`Record Type`	The name of the field that determines what picklist values are available for the record. The record type can be associated with a sales process. Available in Enterprise, Unlimited, Performance, and Developer Editions.
`Shipping and Handling`	The total shipping and handling costs for the quote.
`Ship To`	The shipping address for the account that's associated with the quote.
`Ship To Name`	The name of the entity (such as a person or company) that the quote line items are shipped to.
`Status`	The current status of the quote. The standard options are: • —None— • Draft • Needs Review • In Review • Approved • Rejected • Presented • Accepted • Denied Your admin determines which status is the default for new quotes and which statuses allow you to email a quote PDF.
`Subtotal`	The total of the quote line items before discounts, taxes, and shipping are applied. (Read only.)
`Syncing`	Whether the quote syncs with its associated opportunity. (Read only.)
`Tax`	The total taxes for the quote.
`Total Price`	The total of the quote line items after discounts and before taxes and shipping. (Read only.)

Quote Line Item Fields

Field	Description
`Created By`	The user who created the line item, including creation date and time. (Read only.)
`Date`	The service date, effective date, or other date for the product.
`Discount`	The discount that you apply to the line item. You can enter a number with or without the percent symbol. You can use up to two decimal places.
`Last Modified By`	The user who most recently changed the line item, including the modify date and time. (Read only.)
`Line Description`	The description of the product in the line item.
`Line Item Number`	A system-generated number that identifies the line item. (Read only.)
`List Price`	The price of the product within the price book, including currency. (Read only.)
`Product`	The name of the line item product as listed in the price book. (Read only.)
`Product Code`	The internal code or product number that's used to identify the product.
`Quantity`	The number of units of this line item's product included in the quote. The value must be one or greater. If a quote is synced with an opportunity, this field is updated from the quote line item to the opportunity product. If you use forecasting for your opportunities, this field also appears in the Products list on the Opportunity Forecast Edit page, depending on which forecasting version you use.
`Quote Name`	The name of the quote that the line item is for.
`Sales Price`	The price that you want to use for the product. Initially, the sales price for a product on an opportunity or quote is the product's list price from the price book, but you can change it here. If a quote is synced with an opportunity, this field is updated from the quote line item to the opportunity product. If a quote is synced with an opportunity, this field is updated from the quote line item to the opportunity product. If you use forecasting for your opportunities, this field also appears in the Products list on the Opportunity Forecast Edit page, depending on which forecasting version you use.
`Schedule`	Whether the line item uses schedules in the opportunity. Default schedules aren't carried over from the opportunity when opportunity products are copied to a quote.
`Subtotal`	The line item's sales price multiplied by the quantity.
`Total Price`	The line item's sales price multiplied by the quantity and minus the discount.

Customizing Options for Contracts

Customizing Contract Settings

EDITIONS

Available in: Salesforce Classic

Contracts are available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Approvals are available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To change contract settings:

- "Customize Application"

Customize Salesforce to handle your internal contract management process. To access the contract settings page, from Setup, enter *`Contract Settings`* in the `Quick Find` box, then select **Contract Settings**. You can perform the following tasks in the Contract Settings page.

Enabling Contract Expiration Notices

Set an option to automatically send email notifications to account and contract owners when a contract expires. To activate these expiration notices:

1. Select the `Send contract expiration notice emails...` option.
2. Click **Save**.

Remove the check on this option and click **Save** to stop sending expiration notices.

Disabling Auto-Calculation of Contract End Dates

Your contracts may not have end dates or you may prefer to have users enter them manually. If so, disable auto-calculation of contract end dates:

1. Remove the check in the `Auto-calculate Contract End Date` option.
2. Click **Save**.
3. View your page layout and field-level security settings for `Contract End Date`, `Contract Start Date`, and `Contract Term` to ensure your users can read or edit them as needed.
   - To enable auto-calculation, check this option and click **Save**. If Salesforce auto-calculates `Contract End Date`, it does not display on the contracts edit page.

Note: If **Auto-calculate Contract End Date** is enabled but `Contract Start Date` or `Contract Term` is empty, `Contract End Date` will be blank.

Tracking History for all Statuses

The default is to track history for contracts with a status of either **In Approval Process** or **Activated**. To track history for contracts for all statuses:

1. Select the `Track history for all statuses` option.
2. Click **Save**.

SEE ALSO:

Customizing Order Settings

Customizing Options for Orders

Customizing Order Settings

Customize Salesforce to handle your internal order management process.

Specify the following order settings from the Order Settings page in Setup.

IN THIS SECTION:

Enable Orders

To let your users track and manage customer requests for products or services, enable orders for your organization.

Enable Reduction Orders

To let your users process returns or reductions on orders that have been activated, enable reduction orders for your organization.

Enable Negative Quantities for Order Products

To let your users add order products with quantities of less than zero, enable negative quantities for your organization.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify order settings:

- "Customize Application"

Enable Orders

To let your users track and manage customer requests for products or services, enable orders for your organization.

1. From Setup, enter `Order Settings` in the `Quick Find` box, then select **Order Settings**.
2. Select `Enable Orders` if it isn't already selected.
3. Click **Save**.
4. Select which page layouts should have an Orders related list, and save.
5. Use profiles or permission sets to assign user and object permissions to the appropriate users.

If you later disable orders, all of your existing order-related data will be hidden from view. If for some reason you need to access that data again, you can re-enable orders to view it.

SEE ALSO:

Customizing Order Settings

Enable Reduction Orders

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify order settings:

- "Customize Application"

Enable Reduction Orders

To let your users process returns or reductions on orders that have been activated, enable reduction orders for your organization.

Before you can enable this setting, orders must be enabled for your organization.

1. From Setup, enter *`Order Settings`* in the `Quick Find` box, then select **Order Settings**.
2. Select `Enable Orders` if it isn't already selected.
3. Select `Enable Reduction Orders`.
4. Click **Save**.
5. Using a profile or permission set, assign the necessary permissions to the appropriate users.

   To create reduction orders, users need the "Create Reduction Orders" user permission. To add order products to reduction orders, users need field-level access to these order product fields: `Start Date`, `End Date`, and `Original Order Product`.

Consider adding the Reduction Order Products related list to your page layouts for order products.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To modify order settings:
- "Customize Application"

If this setting is later disabled, the "Create Reduction Orders" permission is hidden from all profiles or permission sets but no data is hidden from view. Users won't be able to create or activate reduction orders, but they will still be able to view and edit existing ones. If you disable reduction orders, also disable any record types or page layouts specific to reduction orders. If you weren't using record types, remove fields specific to reduction orders from your page layouts. These include `Original Order` and `Reduction Order` on the Order object and `Original Order Product` and `Available Quantity` on the Order Product object, as well as any custom fields.

SEE ALSO:

Customizing Order Settings

Enable Negative Quantities for Order Products

To let your users add order products with quantities of less than zero, enable negative quantities for your organization.

Before you can enable this setting, orders must be enabled for your organization.

1. From Setup, enter *`Order Settings`* in the `Quick Find` box, then select **Order Settings**.
2. Select `Enable Orders` if it isn't already selected.
3. Select `Enable Negative Quantity`.
4. Click **Save**.

If this setting is later disabled, users won't be able to add order products with negative quantities or activate orders that have order products with negative quantities. However, users will still be able to view and edit existing order products that have negative quantities.

SEE ALSO:

Customizing Order Settings

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To modify order settings:
- "Customize Application"

Configuring Collaborative Forecasts

Considerations for Collaborative Forecasts Setup

USER PERMISSIONS	
To view Forecast Setup:	"View Setup and Configuration"
To edit Forecast Settings:	"Customize Application"
To enable Forecasts users:	"Manage Internal Users" AND "Customize Application"
To manage quotas:	"Customize Application" AND "Manage Quotas"
To upload quota data to Salesforce:	"Manage Quotas" AND "View All Forecasts"

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

When you set up Collaborative Forecasts, you choose one or more forecast types, enable forecast users, define your forecast hierarchy, and specify other forecast settings.

Important:

- This information applies to Collaborative Forecasts and not to Customizable Forecasts.
- For Forecasts features to function correctly, don't disable the new user interface theme in Salesforce Classic. In addition, original Territory Management must not be enabled. Enterprise Territory Management may be enabled, but forecast rollups are based on the role hierarchy and not the territory hierarchy.
- For best viewing results, keep the `Tab Bar Organizer` enabled when using Collaborative Forecasts.

If you're migrating to Collaborative Forecasts, see Considerations for Migrating from Customizable Forecasting to Collaborative Forecasts. To set up the forecasts feature, you need to:

- Enable one or more forecast types. You can have up to 4 forecast types.
- Select the fields that appear in the opportunity pane for each forecast type.
- Enable quotas if you want to make this functionality available.
- Enable forecasts adjustments for your company and for specific user profiles to make this functionality available.
- Choose whether to use individual forecast category rollups on page 250 or enable cumulative forecast rollups.
- Define your forecast range. You can select the period and default range. Standard and custom fiscal years are supported.
- Customize your forecast categories if your company uses specific terminology.
- Set a forecast currency if your company uses multiple currencies. You can select either your company's corporate currency or the forecast owner's personal currency.
- Enable users who need to use forecasts.

- Set up your forecasts hierarchy to determine how forecasts roll up within your company and who can view and adjust them. To do this, from Setup, enter *Forecasts Hierarchy* in the `Quick Find` box, then select **Forecasts Hierarchy**. The forecast hierarchy is based entirely on the role hierarchy, but also specifies which users are forecast managers.
- Make sure the Forecasts tab is visible to forecasting users.

SEE ALSO:

Define Forecasts Settings

Disable Collaborative Forecasts Functionality

Define Forecasts Settings

USER PERMISSIONS

To view Forecast Setup:	"View Setup and Configuration"
To edit Forecast Settings:	"Customize Application"
To enable Forecasts users:	"Manage Internal Users" AND "Customize Application"
To manage quotas:	"Customize Application" AND "Manage Quotas"
To upload quota data to Salesforce:	"Manage Quotas" AND "View All Forecasts"

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Choose the types of forecasts you want and the details that appear on the Forecasts tab so that your sales reps can see the revenue and quantity projections from their sales pipeline.

Important:

- This information applies to Collaborative Forecasts and not to Customizable Forecasts.
- For Forecasts features to function correctly, don't disable the new user interface theme in Salesforce Classic. In addition, original Territory Management must not be enabled. Enterprise Territory Management may be enabled, but forecast rollups are based on the role hierarchy and not the territory hierarchy.
- For best viewing results, keep the `Tab Bar Organizer` enabled when using Collaborative Forecasts.

If your sales reps already use Customizable Forecasts, but want to use Collaborative Forecasts, contact your Salesforce representative.

In addition, Salesforce recommends that you review the documentation prior to setting up Collaborative Forecasts. If you later change certain settings, you can lose some data.

1. From Setup, enter *Forecasts Settings* in the `Quick Find` box, then select **Forecasts Settings**. If forecasts is not already enabled, select `Enable Forecasts`.

2. If you do not yet have any forecast types enabled, click **Add a Forecast Type**. If you want to enable an additional forecast type, click **Add another forecast type**.
3. Select the forecast type that you want to add. Depending on your other configurations, you can choose Opportunities, Opportunity Splits, Overlay Splits, Product Families, or a custom opportunity currency field.
4. Select the forecast measurement you want to use—Revenue or Quantity. If you want forecasts for both, add separate forecast types for each.

   Not every forecast type supports both measurements. For example, Opportunity Splits forecasts only work with revenue.
5. Select the fields that appear in the opportunity pane of a forecast page.

   You can choose a different set of fields for each forecast type.
6. Click **OK**.
7. You can enable forecasts adjustments for your company and for specific users.*
8. Optionally, enable cumulative forecast rollups.
9. Under Configure the Default Forecast Display, select a Forecast Period, either monthly or quarterly.* Standard and custom fiscal years are supported.
10. Under Configure the Default Forecast Display, use the drop-down lists to select a beginning period and the number of periods you want to display. This setting becomes the default for all Collaborative Forecasts users until they change it for themselves on the Forecasts tab.
11. If you need to, customize your Forecast Categories.
12. If your company uses multiple currencies, select the currency in which your users will forecast.
13. You can enable quotas for your company.
14. Click **Save**.

Now you can enable users who need to use forecasts and set up your forecasts hierarchy to determine how forecasts roll up, and who can view and adjust them.

* You can return to the Forecasts Settings page to make changes. However, making changes can affect your data.

- If you disable adjustments, adjustment data is purged.
- If you change your forecast period, both quota and adjustment data is purged.
- If you remove a forecast type, both quota and adjustment data is purged for that forecast type.
- If you change the forecast measurement for a forecast type from revenue to quantity or from quantity to revenue, both quota and adjustment data is purged for that forecast type.

SEE ALSO:

Considerations for Collaborative Forecasts Setup

Disable Collaborative Forecasts Functionality

Enabling Users for Forecasts

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
2. For each user you want to enable, click **Edit**.
3. Under General Information, select `Allow Forecasting`.
4. Click **Save**.

Enabled users are available in the forecasts hierarchy.

You can also enable additional users or disable users you've already enabled when you configure your forecast hierarchy.

SEE ALSO:

Enable Partner Portal Users to Add Collaborative Forecasts Opportunities

Considerations for Collaborative Forecasts Setup

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Forecasts users:

- "Manage Users"

  AND

  "Customize Application"

Enable Partner Portal Users to Add Collaborative Forecasts Opportunities

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Before beginning, make sure that you've:

- Enabled partner portals for your organization and created a partner portal.
- Created a partner profile and assigned it to your partner portal.
- Enabled an account as a partner and enabled partner portal login for a contact of that account.

If your organization works with partners, you can include the figures from partner user opportunities in users' forecasts. Follow these steps to add partner portal users to the forecast hierarchy.

1. From Setup, enter `Users` in the `Quick Find` box, then select **Users** and select the partner portal contact you created.
2. Make sure that the Active and Allow Forecasting checkboxes are selected.
3. Enable the partner portal user in the forecast hierarchy and make sure the person is assigned to an active forecast manager.

Opportunities that a partner portal user creates can roll up to the forecast of the account owner; note that the account owner must be the person's forecast manager in the forecast hierarchy for the opportunities to roll up into the forecast. For example, say Gordon Johnson:

- Owns a partner account called Acme
- Has an Acme contact named Anne Smith
- Anne is a partner portal user
- Anne reports to Gordon in the forecasts hierarchy

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Forecasts users:

- "Manage Internal Users"

  AND

  "Customize Application"

To assign partner profiles to partner portals:

- "Customize Application"

If Anne adds opportunities in her portal, Gordon sees those opportunities in his forecast; because Gordon is Anne's forecast manager, Gordon can adjust forecast amounts based on her opportunities and see how she's tracking against her quota. However, it's important to note that partner portal users don't have access to the Collaborative Forecasts tab or any of its functionality.

SEE ALSO:

Considerations for Collaborative Forecasts Setup

Set Up Your Forecast Hierarchy

Your forecast hierarchy lists all forecast users and determines how their forecasts roll up through your organization. Keep your forecast hierarchy up-to-date to ensure that forecast managers see all subordinates' forecast amounts.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

When you assign a user as a forecast manager, all forecasts and adjustments from the manager's subordinates in the hierarchy roll up into his or her forecasts. It's important to always assign a forecast manager to the top level of the forecast hierarchy.

1. From Setup, enter *`Forecasts Hierarchy`* in the `Quick Find` box, then select **Forecasts Hierarchy**. Click **Expand All** to see the roles available in your organization.
2. Click **Enable Users** and click **Add** and **Remove** to move users between the Available Users list and the Enabled Users list. If you previously enabled a user from Setup by entering *`Users`* in the `Quick Find` box, then selecting **Users** and editing a user page to allow forecasting, the name already appears in the Enabled Users list.
3. If you need to select a forecast manager for each manager role in the hierarchy, click **Edit Manager** next to the role, then select a name from the `Forecast Manager` drop-down list.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Forecasts users:
- "Manage Users"

  AND

  "Customize Application"

Note: Be sure each sales manager with subordinates is designated as a forecast manager in your forecast hierarchy. This ensures that the forecast visibility rolls up to every level of the hierarchy.

If you want users to be able to adjust forecasts, enable adjustments on page 249 next.

SEE ALSO:

Enabling Forecasts Adjustments

Enabling Users for Forecasts

Enable Quotas in Forecasts

USER PERMISSIONS	
To view Forecast Setup:	"View Setup and Configuration"
To edit Forecast Settings:	"Customize Application"
To enable Forecasts users:	"Manage Internal Users" AND "Customize Application"
To manage quotas:	"Customize Application" AND "Manage Quotas"
To upload quota data to Salesforce:	"Manage Quotas" AND "View All Forecasts"

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in: **Professional** Edition with the "API Enabled" permission

Organizations with API access can upload quotas for Collaborative Forecasts users and display them alongside users' forecast amounts. To simply enable quotas for your organization, API access is not needed.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

A quota is the sales goal assigned to a user on a monthly or quarterly basis. A manager's quota equals the amount the manager and team are expected to generate together. The quota rollup is done manually by users and managers, and either revenue or quantity data can be used. If your organization has more than one type of forecast enabled, each forecast type maintains its own separate quota information. Follow these steps to enable quotas for Collaborative Forecasts in your organization.

1. From Setup, enter *`Forecasts Settings`* in the `Quick Find` box, then select **Forecasts Settings**.
2. Under Quotas, select `Show Quotas`.
3. Click **Save**.

Note: If you disable Collaborative Forecasts, quotas are also disabled. Additionally, when you change your data source or disable revenue or quantity forecasts, related quotas are purged.

SEE ALSO:

Load Quota Data for Forecasts

Considerations for Collaborative Forecasts Setup

Load Quota Data for Forecasts

USER PERMISSIONS	
To view Forecast Setup:	"View Setup and Configuration"
To edit Forecast Settings:	"Customize Application"
To enable Forecasts users:	"Manage Internal Users" AND "Customize Application"
To manage quotas:	"Customize Application" AND "Manage Quotas"
To upload quota data to Salesforce:	"Manage Quotas" AND "View All Forecasts"

EDITIONS
Available in: Salesforce Classic
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions Available in: **Professional** Edition with the "API Enabled" permission

Load quota data for forecasts with the Data Loader or the API.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

To upload quotas for users in your organization, you can use either the Data Loader application or the Salesforce APIs. The Data Loader provides a simple point-and-click method for adding, inspecting, and editing data in your organization. The APIs provide additional flexibility but require you to write code. To use either method, your organization must have API access enabled. See Data Loader for more details about Data Loader.

Add Quotas with the Data Loader

Before you upload quotas, consider which version of the Data Loader you are using. For Data Loader v.30 and later, you'll need to specify the forecast type of each quota you plan to upload.

If you are using Data Loader v.30 or later:	If you are using Data Loader v.29 or earlier:
1. Query the User object to get the IDs of your users.	1. Query the User object for your users' IDs.
2. Make note of the names and IDs of the users for whom you want to upload quotas.	2. Make note of the names and IDs of the users for whom you want to upload quotas.
3. Query the ForecastingType object to get the IDs of your forecast types.	3. Prepare a .csv file with user names, IDs, and quotas (either amount or quantity), and the start date of each quota's forecast period. If you use both revenue and quantity forecasts, specify the quotas for each on separate rows of your .csv file.
4. Make note of the IDs of the forecast types your organization is using.	4. Upload your quotas .csv file using the Data Loader.

If you are using Data Loader v.30 or later:	If you are using Data Loader v.29 or earlier:
5. Prepare a .csv file with user names, user IDs, forecasting type names, Forecasting Type IDs, quotas (either amount or quantity), and the start date of each quota's forecast period.	
6. Upload your quotas .csv file using the Data Loader.	

1. Query the User object for your users' IDs.

   Use the Data Loader to retrieve your users' IDs.

   a. From Setup, enter *`Data Loader`* in the `Quick Find` box, then select **Data Loader**.
   b. Download and install the Data Loader application.
   c. Launch the Data Loader.
   d. Click **Export**.
   e. Enter your user name and password and click **Log in**.
   f. Click **Next**.
   g. Select the User object from the list.
   h. Choose a file name and destination for the exported data.
   i. Click **Next**.
   j. Select the `Id` and `Name` fields.
   k. Click **Finish** and then click **Yes**.
   l. Click **View Extraction**.
   m. Click **Open in external program**.
   n. Save the file in the .csv format. You'll add user names and IDs to your quotas spreadsheet before uploading it.

2. If you are using Data Loader v.30 or later, query the ForecastingType object to get the IDs of your forecast types.

   a. If you haven't already, from Setup, enter *`Data Loader`* in the `Quick Find` box, then select **Data Loader**, then download and install the Data Loader application.
   b. Launch the Data Loader.
   c. Click **Export**.
   d. Enter your user name and password and click **Log in**.
   e. Click **Next**.
   f. Click **Show all Salesforce objects**.
   g. Select the Forecasting Type object from the list.
   h. Choose a file name and destination for the exported data.
   i. Click **Next**.
   j. Select the `Id` and `DeveloperName` fields.
   k. Click **Finish** and then click **Yes**.
   l. Click **View Extraction**.

m. Click **Open in external program**.

n. Save the file in the .csv format.

o. Note the `DeveloperName` and `Id` values for each of your active forecast types. Your organization may not be using all of the forecast types that appear in the results. See the list below if you're not sure which forecast type a specific `DeveloperName` refers to.

- `OpportunityRevenue` : Opportunities - Revenue
- `OpportunityQuantity` : Opportunities - Quantity
- `OpportunitySplitRevenue` : Opportunity Revenue Splits - Revenue
- `OpportunityOverlayRevenue` : Opportunity Overlay Splits - Revenue
- `OpportunityLineItemRevenue` : Product Families - Revenue
- `OpportunityLineItemQuantity` : Product Families - Quantity
- The name of a custom opportunity split type that has been enabled as a forecast type. Custom split types are based on currency fields, which can only contain revenue amounts.

p. Add columns for `DeveloperName` and `Id` to your quota spreadsheet and add the name and ID of the forecast type of your quotas to each row. The name is not necessary for uploading quotas, but will help you know which forecast type you are working with in each row.

3. Prepare your quota spreadsheet for upload.

- If you are using Data Loader v.30 or later, create a .csv file with columns for User Name, User ID, Forecast Type Name, Forecast Type ID, Quota Amount, Quota Quantity, Currency Code, and forecast period Start Date [YYYY-MM-DD].
- If you are using Data Loader v.29 or earlier, create a .csv file with columns for User Name, User ID, Quota Amount, Quota Quantity, Currency Code, and forecast period Start Date [YYYY-MM-DD]. If you use both revenue and quantity forecasts, specify the quotas for them on separate rows of your .csv file.

You don't actually need the User Name or Forecast Type Name columns, but including them makes it much easier for you to understand the contents of your .csv file.

User Name	User ID	Forecast Type Name (for Data Loader v.30 or later)	Forecast Type ID (for Data Loader v.30 or later)	Quota Amount	Quota Quantity	Currency Code	Start Date
Kevin Bailey	00599000000Hofh	OpportunityRevenue	0DbD00000001eQBKAY	250000		USD	2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityRevenue	0DbD00000001eQBKAY	250000		USD	2012–04–01
Kevin Bailey	00599000000Hofh	OpportunityRevenue	0DbD00000001eQBKAY	250000		USD	2012–05–01
Kevin Bailey	00599000000Hofh	OpportunityQuantity	0DbD00000001eQAKAY		500		2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityQuantity	0DbD00000001eQAKAY		500		2012–04–01
Kevin Bailey	00599000000Hofh	OpportunityQuantity	0DbD00000001eQAKAY		500		2012–05–01

If your forecast `Data Source` is product families, include a column for Product Family as well.

User Name	User ID	Forecast Type Name (for Data Loader v.30 or later)	Forecast Type ID (for Data Loader v.30 or later)	Product Family	Quota Amount	Quota Quantity	Currency Code	Start Date
Kevin Bailey	00599000000Hofh	OpportunityLineItemRevenue	0DbD00000001eQ9KAI	Hardware	250000		USD	2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityLineItemRevenue	0DbD00000001eQ9KAI	Software	150000		USD	2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityLineItemRevenue	0DbD00000001eQ9KAI	Services	50000		USD	2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityLineItemQuantity	0DbD00000001eQ8KAI	Hardware		500		2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityLineItemQuantity	0DbD00000001eQ8KAI	Software		300		2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityLineItemQuantity	0DbD00000001eQ8KAI	Services		100		2012–03–01

4. Use the Data Loader to upload your quota information to Salesforce.
   a. If you haven’t already, launch the Data Loader.
   b. Click **Insert**.
   c. Log in with your user name and password.
   d. Click **Next**.
   e. Click **Show All Salesforce Objects**.
   f. Select the Forecasting Quota object from the list.
   g. Click **Browse** and choose the .csv file you want to upload.
   h. Click **Next**.
   i. Click **OK** in the Data Selection dialog box that opens.
   j. Click **Create or Edit a Map**.
   k. Map these columns to fields in the ForecastingQuota object as shown in the table.

Column headers in CSV file	ForecastingQuota fields
User ID	`QuotaOwnerID`
Quota Amount	`QuotaAmount`
Quota Quantity	`QuotaQuantity`
Currency Code	`CurrencyIsoCode`
Start Date	`StartDate`
Product Family (needed only when the forecast data source is Product Families)	`ProductFamily`
Forecast Type ID (needed only for Data Loader v.30 or later)	`ForecastingTypeID`

   l. Click **OK**.
   m. Click **Next**.

n. Click **Browse** and choose the directory where you want to save the log file containing messages about the success or failure of the upload.

o. Click **Finish**.

p. Click **Yes** to proceed with the upload.

q. Click **OK**.

As a best practice, load quota data in the quota owner's personal currency. Note that you can still upload quota data using the API even if `Show Quotas` is disabled. If your Data Loader time zone setting is ahead of quota owners' time zones, the month can be off by one. To avoid this problem, use a date greater than or equal to the third day of each month when inserting quotas.

Uploading Quotas with the API

When uploading quota information with the API, be sure to use the correct API version, depending on the type of quota data you are working with. If your organization has more than one type of forecast enabled, each forecast type maintains its own separate quota information.

When importing...	Use API version...
Revenue quotas for opportunity-based forecasts	25.0 or later
Quantity quotas for opportunity-based forecasts	28.0 or later
Revenue quotas for opportunity splits-based forecasts	29.0 or later
Revenue or quantity quotas for product family-based forecasts	29.0 or later
Quotas in organizations with more than one forecast type enabled	30.0 or later

Enabling Forecasts Adjustments

Administrators can enable managers to adjust subordinates' forecasts, all forecast users to adjust their own forecasts, or both.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Before enabling adjustments, make sure you've set up your forecast hierarchy.

1. From Setup, enter *`Forecasts Settings`* in the `Quick Find` box, then select **Forecasts Settings**.
2. If you want to allow forecast managers to adjust their subordinates' forecast amounts, under Enable Forecast Adjustments, select `Enable Manager Adjustments`.
3. If you want to allow all forecast users to adjust their own forecast amounts, under Enable Forecast Adjustments, select `Enable Owner Adjustments`

   Note: If your organization uses product family forecasts, you can't adjust your own product family forecast amounts.

4. Click **Save**.
5. From Setup, enter *`Profiles`* in the `Quick Find` box, then select **Profiles**.
6. Find a profile for which you want adjustments enabled.
7. If you're using the enhanced profile user interface, click **App Permissions** and click **Edit**.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Forecasts users:
- "Manage Users"

  AND

  "Customize Application"

8. Select `Override Forecasts` and click **Save**.

If you have more than one type of forecast enabled, each forecast type maintains its own separate adjustments.

SEE ALSO:

Considerations for Collaborative Forecasts Setup

Define Your Company's Forecast Date Range

Disabling Forecasts Adjustments

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Forecasts users:

- "Manage Users"

  AND

  "Customize Application"

Turn off forecast adjustments if you no longer want forecast managers to adjust subordinates' forecast amounts or forecast owners to adjust their own forecasts.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Warning: Disabling forecasts adjustments purges existing adjustments for all forecast types. Before disabling adjustments, see Adjustments Purges. Since disabling certain functionality can result in purged quota and adjustment data, consider exporting your data before disabling anything. When you complete your setting changes, you can import the data back into Salesforce.

1. From Setup, enter *`Forecasts Settings`* in the `Quick Find` box, then select **Forecasts Settings**.
2. To prevent forecast managers from adjusting subordinates' forecast amounts, under Enable Forecast Adjustments, deselect `Enable Manager Adjustments`.
3. To prevent all forecast users from adjusting their own forecast amounts, under Enable Forecast Adjustments, deselect `Enable Owner Adjustments`.
4. Click **Save**. You don't need to update user permissions because adjustments are now disabled for your entire organization.

Example: Say you have forecast managers who adjusted forecast amounts for some direct reports. After you disable adjustments for your organization, the next time the managers view their respective forecast rollups, no adjustments will appear.

Cumulative Forecast Rollups Overview

As an administrator, you can choose between two methods of rolling up opportunities into forecasts for your sales teams.

- Individual forecast category rollups, which combine the opportunities from each individual forecast category into separate forecast amounts for each category.
- Cumulative forecast rollups, which combine opportunities from more than one forecast category into cumulative forecast amounts.

The default rollup setting for organizations is individual forecast category rollups. If you choose Cumulative Forecast Rollups in Setup, the way opportunities roll up to forecast amounts is different. The column names on the Forecasts tab are also different. See the differences for yourself.

Category rollup method	Column name in the Forecasts tab	Opportunities that roll up to it
Individual	Pipeline	Pipeline
	Best Case	Best Case

Category rollup method	Column name in the Forecasts tab	Opportunities that roll up to it
	Commit	Commit
	Closed	Closed
Cumulative	Open Pipeline	• Pipeline • Best Case • Commit
	Best Case Forecast	• Best Case • Commit • Closed
	Commit Forecast	• Commit • Closed
	Closed Only	Closed

Advantages of Cumulative Forecast Rollups

With individual forecast category rollups, each total and subtotal represents opportunities from only one of the individual forecast categories. This type of rollup means that if forecast users want to know the total that they're going to actually bring for the month or quarter, they need to add the Best Case, Commit, and Closed forecast amounts together themselves.

Example: *Individual* forecast rollup				
Forecast amounts	Closed	Commit	Best Case	Pipeline
	$50	$100	$150	$200
Opportunities	Closed	Commit	Best Case	Pipeline
	$50	• $50 • $50	• $50 • $50 • $50	• $50 • $50 • $50 • $50

With Cumulative Forecast Rollups, the forecast columns show cumulative amounts from the opportunities in the named forecast category, as well as subsequent categories in your sales funnel. This view makes it easier for sales teams to see the total numbers they're likely to bring in, saving them from combining the category totals themselves.

For example, this table shows the cumulative forecast rollup amounts when there are four Pipeline, three Best Case, two Commit, and one Closed opportunity, each worth $50.

Example: *Cumulative* forecast rollup				
Forecast amounts	Closed Only	Commit Forecast	Best Case Forecast	Open Pipeline

Example: ***Cumulative*** **forecast rollup**				
	$50	$150	$300	$450
Opportunities	Closed	Commit	Best Case	Pipeline
	$50	• $50 • $50	• $50 • $50 • $50	• $50 • $50 • $50 • $50

Note: Forecast Historical Trending can't be used in organizations that use Cumulative Forecast Rollups.

Enable Cumulative Forecast Rollups for Sales Reps and Managers

Your organization can use either Cumulative Forecast Rollup columns or individual forecast category columns.

Be aware that changing the forecast column display purges all adjustments to Commit and Best Case forecast amounts, but not quota data.

1. From Setup, enter `Forecasts Settings` in the `Quick Find` box, then select **Forecasts Settings**.
2. Enable Cumulative Forecast Rollups.

USER PERMISSIONS

To view Forecast Setup:
- "View Setup and Configuration"

To edit Forecast Settings:
- "Customize Application"

Selecting a Forecast Currency

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Before selecting a forecast currency, review information in Working With Multiple Currencies in Forecasts.

1. From Setup, enter `Forecasts Settings` in the `Quick Find` box, then select **Forecasts Settings**.
2. Under Forecast Currency, choose a forecast currency option.
3. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Forecasts users:
- "Manage Users"

  AND

  "Customize Application"

Forecast Types Overview

Give users the flexibility of having up to four types of forecasts, so they can predict sales from multiple perspectives.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Here are the types of forecasts you can let your users choose from.

Forecast Type	How is the rollup calculated?
Opportunities - Revenue	The rollup is based on the opportunity Amount field.
Opportunities - Quantity	The rollup is based on the opportunity Quantity field.
Product Families - Revenue	The rollup is based on the opportunity Amount field, and forecast amounts are separated by product family. To use a Product Family forecast, your organization must also use Opportunity Products and Product Families.
Product Families - Quantity	The rollup is based on the opportunity Quantity field, and forecast amounts are separated by product family. To use a Product Family forecast, your organization must also use Opportunity Products and Product Families.
Opportunity Splits - Revenue	The rollup is based on the opportunity Amount field and each sales team member's split percentage. For Opportunity Splits - Revenue forecasts, the split percentages for each opportunity must total 100%. To use opportunity splits forecasts, Opportunity Teams, Opportunity Splits, and the Revenue split type must be enabled.
Overlay Splits - Revenue	The rollup is based on the opportunity Amount field and each overlay sales team member's split percentage. For Overlay Splits - Revenue forecasts, the split percentages do not need to total 100%. To use overlay splits forecasts, Opportunity Teams, Opportunity Splits, and the Overlay split type must be enabled.
Custom Opportunity Currency Field - Revenue	The rollup is based on the amount in the custom opportunity currency field that you specify. To use custom opportunity currency field forecasts, Opportunity Teams and Opportunity Splits must be enabled. A custom split type for the field must also be enabled, even if you don't intent to split credit for the field amount.

Forecast Type	How is the rollup calculated?
Expected Revenue - Revenue	The rollup is based on the amount in the opportunity Expected Revenue field. To forecast on the Expected Revenue field, Opportunity Teams and Opportunity Splits must be enabled. A custom split type for the field must also be enabled, even if you don't intent to split credit for the field amount.

Opportunities

Use an opportunity revenue forecast if you want to forecast on the amount field of opportunities. Use an opportunity quantity forecast of you want to forecast on the quantity field of opportunities.

Product Families

Use a product family forecast if your organization groups its products and services into families and needs to forecast based on those families. With product families, keep in mind the following.

- The Amount column appears in the opportunity list on the Forecast page.
- You can forecast on revenue, or quantity, or both.
- Forecast users will be able to view individual product family forecasts for each sales rep below them in the forecast hierarchy.
- Your organization must use Opportunity Products and Product Families.
- Users should populate the Product Family field on each product record. Forecasts for products without a Product Family value appear in a forecast row titled Products Not Categorized. (If an opportunity lacks line items, the opportunity amount or quantity also appears in this row.)
- Adjustments can be made to the forecasts for a sales rep's product family forecasts, but not directly to their total forecast for all product families.
- You can set separate product family quotas for each sales rep, but not a single quota for each sales rep.

Opportunity Splits

Use an opportunity splits revenue forecast if your sales organization uses team selling and opportunity splits. With opportunity splits, keep in mind the following.

- The Forecasted Amount and Split % columns appear in the opportunity list on the Forecast page.
- You can forecast on revenue, but not on quantity.
- Your organization must have Team Selling, Opportunity Splits, and the Revenue split type enabled.

Overlay Splits

Use overlay splits to track revenue from sales team members who help close opportunities, but are not directly responsible for them.

- The overlay splits on a specific opportunity do not have to total 100%.
- You can forecast on revenue, but not on quantity.
- Your organization must have Team Selling, Opportunity Splits, and the Overlay split type enabled.

Custom Opportunity Currency Fields

If your organization uses any custom currency fields on opportunities, you can forecast on the amounts in those fields.

- Because the field must be a custom currency field, you can forecast on revenue, but not quantity.
- You can forecast on the custom field whether or not it includes opportunity splits.
- Regardless of whether the field uses splits, your organization must have Team Selling, Opportunity Splits, and a custom split type enabled for the field.

Expected Revenue

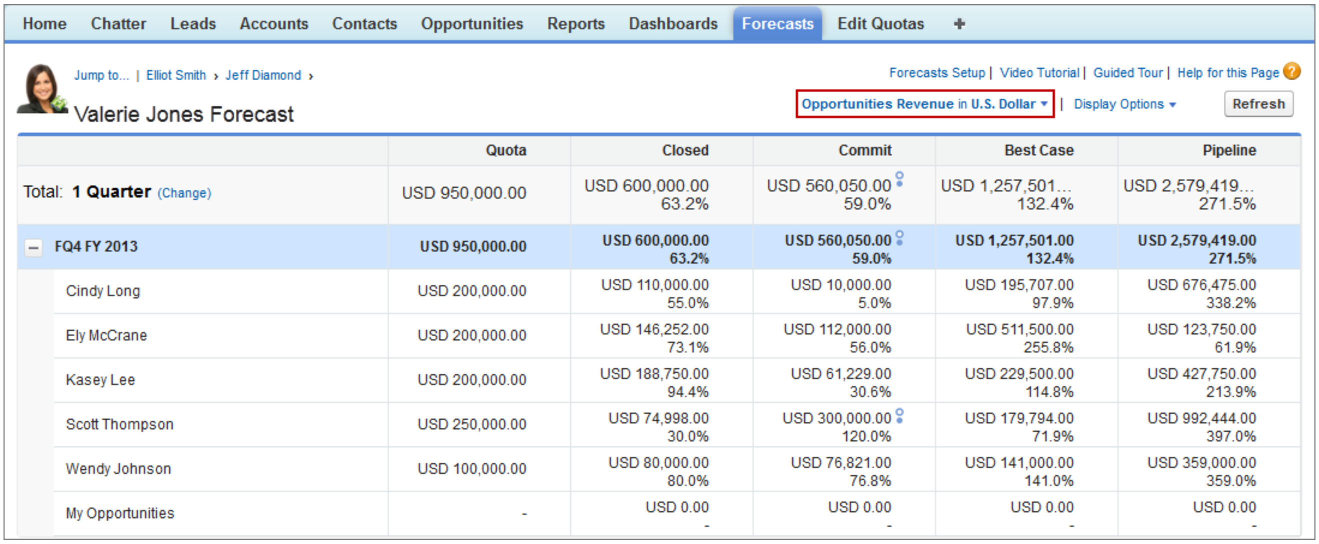
The Expected Revenue field on opportunities is useful if there is often a difference between the value of the Amount field and the actual revenue brought in by the opportunity. If your sales team can anticipate this difference, they may want to use the Expected Revenue field, and forecast on it.

- You can forecast on revenue, but not quantity.
- You can forecast on the Expected Revenue field whether or not you use opportunity splits with it.
- Regardless of whether you use splits with the Expected Revenue field, your organization must have Team Selling, Opportunity Splits, and a custom split type enabled for it.

When you enable more than one type of forecast, Custom Forecast Views lets you customize the opportunity information that's displayed for each forecast.

Here's an example—your sales team forecasts revenue from both opportunities and product families. You'll enable both opportunity and product family forecasts based on revenue.

Here you can see the Opportunities Revenue forecast page, which shows revenue totals for each sales rep in each forecast rollup.


Home
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Contacts
Opportunities
Reports
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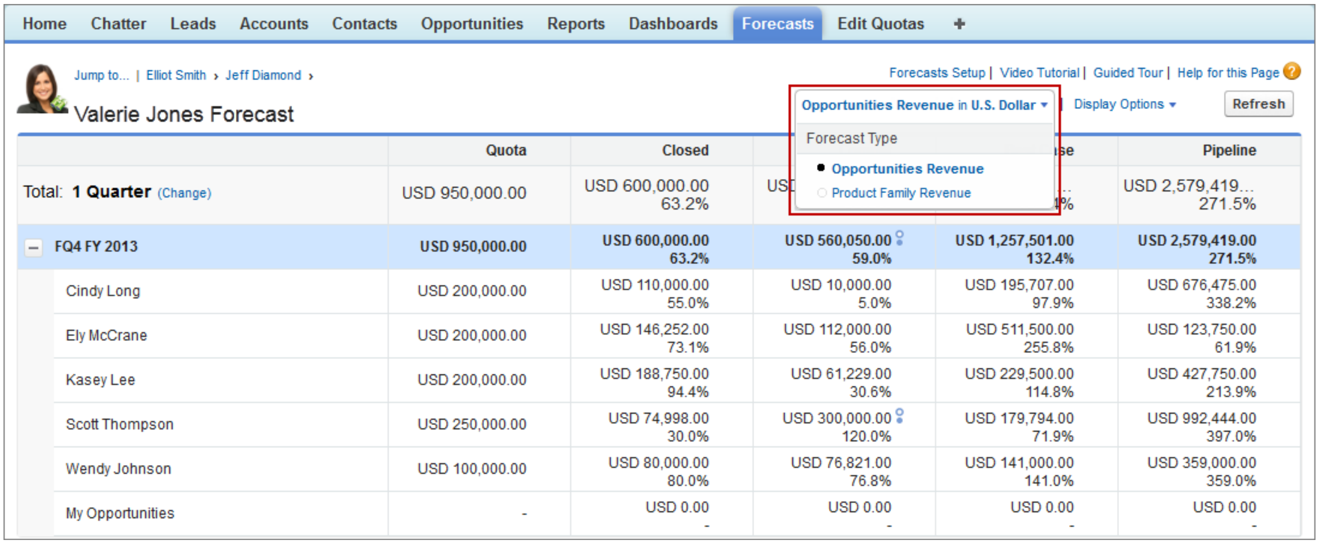
Forecasts
Edit Quotas
+
Jump to... | Elliot Smith › Jeff Diamond ›
Valerie Jones Forecast
Forecasts Setup | Video Tutorial | Guided Tour | Help for this Page
Opportunities Revenue in U.S. Dollar
Display Options
Refresh

	Quota	Closed	Commit	Best Case	Pipeline
Total: **1 Quarter** (Change)	USD 950,000.00	USD 600,000.00 63.2%	USD 560,050.00 59.0%	USD 1,257,501... 132.4%	USD 2,579,419... 271.5%
FQ4 FY 2013	**USD 950,000.00**	**USD 600,000.00 63.2%**	**USD 560,050.00 59.0%**	**USD 1,257,501.00 132.4%**	**USD 2,579,419.00 271.5%**
Cindy Long	USD 200,000.00	USD 110,000.00 55.0%	USD 10,000.00 5.0%	USD 195,707.00 97.9%	USD 676,475.00 338.2%
Ely McCrane	USD 200,000.00	USD 146,252.00 73.1%	USD 112,000.00 56.0%	USD 511,500.00 255.8%	USD 123,750.00 61.9%
Kasey Lee	USD 200,000.00	USD 188,750.00 94.4%	USD 61,229.00 30.6%	USD 229,500.00 114.8%	USD 427,750.00 213.9%
Scott Thompson	USD 250,000.00	USD 74,998.00 30.0%	USD 300,000.00 120.0%	USD 179,794.00 71.9%	USD 992,444.00 397.0%
Wendy Johnson	USD 100,000.00	USD 80,000.00 80.0%	USD 76,821.00 76.8%	USD 141,000.00 141.0%	USD 359,000.00 359.0%
My Opportunities	-	USD 0.00 -	USD 0.00 -	USD 0.00 -	USD 0.00 -

Each user can change the forecast view from one forecast type to another using the forecast type menu, which we see here.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Display Options
Refresh

Valerie Jones Forecast

Opportunities Revenue in **U.S. Dollar**

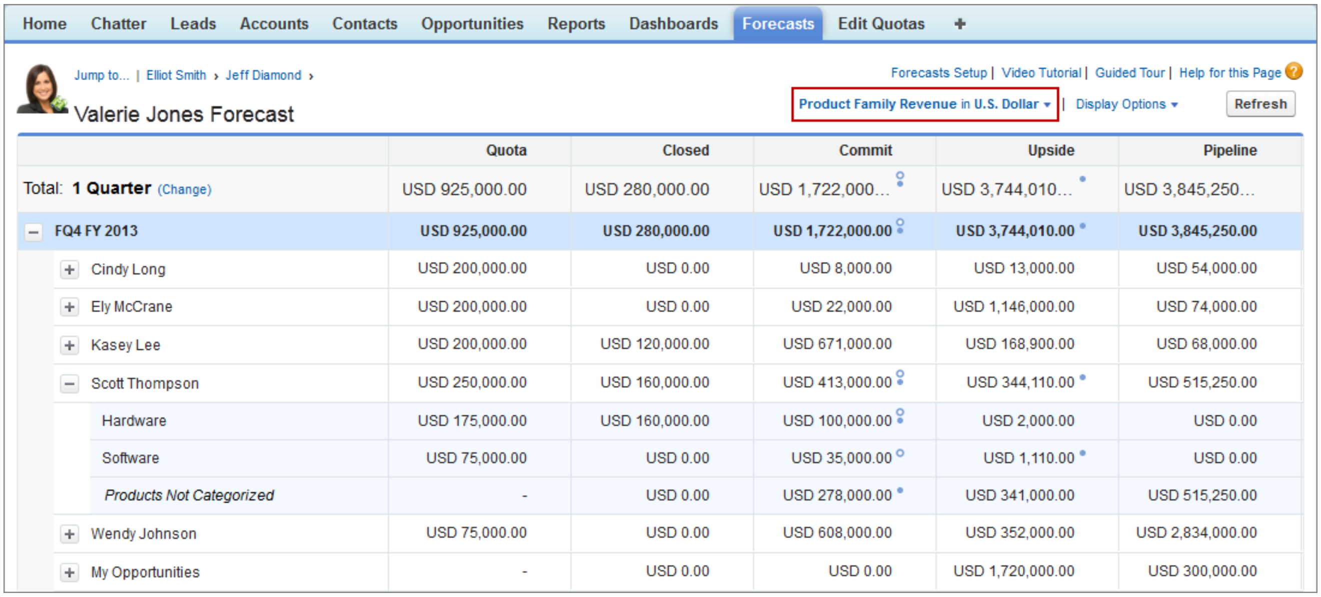
Forecast Type

● Opportunities Revenue

○ Product Family Revenue

	Quota	Closed		se	Pipeline
Total: **1 Quarter** (Change)	USD 950,000.00	USD 600,000.00 63.2%	US	… %	USD 2,579,419… 271.5%
FQ4 FY 2013	**USD 950,000.00**	**USD 600,000.00 63.2%**	**USD 560,050.00 59.0%**	**USD 1,257,501.00 132.4%**	**USD 2,579,419.00 271.5%**
Cindy Long	USD 200,000.00	USD 110,000.00 55.0%	USD 10,000.00 5.0%	USD 195,707.00 97.9%	USD 676,475.00 338.2%
Ely McCrane	USD 200,000.00	USD 146,252.00 73.1%	USD 112,000.00 56.0%	USD 511,500.00 255.8%	USD 123,750.00 61.9%
Kasey Lee	USD 200,000.00	USD 188,750.00 94.4%	USD 61,229.00 30.6%	USD 229,500.00 114.8%	USD 427,750.00 213.9%
Scott Thompson	USD 250,000.00	USD 74,998.00 30.0%	USD 300,000.00 120.0%	USD 179,794.00 71.9%	USD 992,444.00 397.0%
Wendy Johnson	USD 100,000.00	USD 80,000.00 80.0%	USD 76,821.00 76.8%	USD 141,000.00 141.0%	USD 359,000.00 359.0%
My Opportunities	-	USD 0.00 -	USD 0.00 -	USD 0.00 -	USD 0.00 -

And when users change the forecast type to Product Family Revenue, they can see each sales rep's totals by product family.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Display Options
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Valerie Jones Forecast

Product Family Revenue in **U.S. Dollar**

	Quota	Closed	Commit	Upside	Pipeline
Total: **1 Quarter** (Change)	USD 925,000.00	USD 280,000.00	USD 1,722,000…	USD 3,744,010…	USD 3,845,250…
FQ4 FY 2013	**USD 925,000.00**	**USD 280,000.00**	**USD 1,722,000.00**	**USD 3,744,010.00**	**USD 3,845,250.00**
+ Cindy Long	USD 200,000.00	USD 0.00	USD 8,000.00	USD 13,000.00	USD 54,000.00
+ Ely McCrane	USD 200,000.00	USD 0.00	USD 22,000.00	USD 1,146,000.00	USD 74,000.00
+ Kasey Lee	USD 200,000.00	USD 120,000.00	USD 671,000.00	USD 168,900.00	USD 68,000.00
− Scott Thompson	USD 250,000.00	USD 160,000.00	USD 413,000.00	USD 344,110.00	USD 515,250.00
Hardware	USD 175,000.00	USD 160,000.00	USD 100,000.00	USD 2,000.00	USD 0.00
Software	USD 75,000.00	USD 0.00	USD 35,000.00	USD 1,110.00	USD 0.00
Products Not Categorized	-	USD 0.00	USD 278,000.00	USD 341,000.00	USD 515,250.00
+ Wendy Johnson	USD 75,000.00	USD 0.00	USD 608,000.00	USD 352,000.00	USD 2,834,000.00
+ My Opportunities	-	USD 0.00	USD 0.00	USD 1,720,000.00	USD 300,000.00

Enable Forecast Types for Collaborative Forecasts

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

A forecast type is a forecast configured to use a specific type of data. The opportunity `Amount` field, opportunity splits, overlay splits, custom opportunity fields, or product families can be used. Each forecast type also specifies a measurement—either revenue or quantity. With opportunities and product families, you can set up forecast types for both quantity and revenue. With opportunity splits the only choice is revenue. Before you add forecast types, be sure you understand the details of each.

1. From Setup, enter *`Forecasts Settings`* in the `Quick Find` box, then select **Forecasts Settings**.
2. If your organization:
   - Doesn't yet have any forecast types enabled, click **Add a Forecast Type**.
   - Already has at least one forecast type enabled, click **Add another forecast type**.
3. From the Forecast Type menu, choose the data source you want to use for the forecast.
4. Choose the Forecast Measurement you want to use: Revenue or Quantity. If you want both, add separate forecast types for each.
5. Choose the columns you want to display in the related opportunities list on the Forecast tab for the forecast type.
   If your forecast data source is opportunities or product families, the Amount field appears by default. If your data source is opportunity splits, the Forecasted Amount and Split % fields appear by default. You can change the selected fields for each forecast type even after it has been enabled. Depending on whether your forecast type uses the revenue or quantity measurement, consider adding `Amount` or `Quantity` to the pane.
6. Click **OK** and then **Save**.

Repeat this procedure for each forecast type you want to add. When you enable a forecast type, the initial calculation of the new forecast can take some time, depending on the number of opportunities, users, and product families in your organization.

Warning: If you disable a forecast type, all related quota and adjustment information is purged.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable a forecast type:
- "Customize Application"

SEE ALSO:

Considerations for Collaborative Forecasts Setup

Selecting Fields that Appear in the Collaborative Forecasts Opportunity Pane

Enable Revenue Splits Forecasts for Sales Managers

Help your sales teams track revenue from opportunities with multiple sales reps when you add Revenue Splits Forecasts to your organization.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Before you enable Revenue Splits Forecasts, make sure you've enabled:

- Collaborative Forecasts
- Team Selling and Opportunity Splits
- The Revenue opportunity split type

With those features enabled, you're ready to enable Overlay Splits Forecasts.

1. From Setup, enter `Forecasts Settings` in the `Quick Find` box, then select **Forecasts Settings**.
2. If your organization:
   - Doesn't yet have any forecast types enabled, click **Add a Forecast Type**.
   - Already has at least 1 forecast type enabled, click **Add another forecast type**. You can enable up to 4 forecast types.
3. From the Forecast Type menu, choose **Opportunity Revenue Splits**. Revenue is the only forecast measurement available for overlay splits.
4. Choose the columns you want to display in the related opportunities list on the Forecast tab for the overlay forecast. To make it easy for forecast users to see the split amounts on each opportunity, include the Split column.
5. Click **OK** and then **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Performance**, **Unlimited**, **Enterprise**, and **Developer** Editions

USER PERMISSIONS

To view Forecast Setup:
- "View Setup and Configuration"

To edit Forecast Settings:
- "Customize Application"

Enable Overlay Splits Forecasts for Sales Managers

Help your sales teams track revenue from overlay sales roles when you add Overlay Forecasts to your organization.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Before you enable Overlay Forecasts, make sure you've enabled:

- Collaborative Forecasts
- Team Selling and Opportunity Splits
- The Overlay opportunity split type

With those features enabled, you're ready to enable Overlay Splits Forecasts.

1. From Setup, enter `Forecasts Settings` in the `Quick Find` box, then select **Forecasts Settings**.
2. If your organization:
   - Doesn't yet have any forecast types enabled, click **Add a Forecast Type**.
   - Already has at least one forecast type enabled, click **Add another forecast type**. You can enable up to four forecast types.
3. From the Forecast Type menu, choose **Opportunity Overlay Splits**. Revenue is the only forecast measurement available for overlay splits.

EDITIONS

Available in: Salesforce Classic

Available in: **Performance**, **Unlimited**, **Enterprise**, and **Developer** Editions

USER PERMISSIONS

To view Forecast Setup:
- "View Setup and Configuration"

To edit Forecast Settings:
- "Customize Application"

4. Choose the columns you want to display in the related opportunities list on the Forecast tab for the overlay forecast. Include the Split column to make it easy for forecast users to see the split amounts on each opportunity.
5. Click **OK** and then **Save**.

Enable Custom Field Forecasts for Sales Managers

To enable a custom field forecast, first enable a custom split type for the field, and then add a forecast for it.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

For each custom opportunity field your sales teams want to forecast on, first enable a custom split type—even if the field doesn't include splits. When a sales rep creates an opportunity, the rep automatically receives a 100% split for any 100% validated custom split type you enable. So even if you don't intend to split the custom field, the forecast rollup always includes 100% of the amount in the custom field.

Before you enable custom field forecasts, make sure you've enabled:

- Collaborative Forecasts
- At least one custom opportunity currency field
- Team Selling and Opportunity Splits
- A custom opportunity split type based on the custom field (For details on enabling split types, see Enable Opportunity Splits and Split Types on page 213.)

With those features enabled, you're ready to enable a custom field forecast.

1. From Setup, enter `Forecasts Settings` in the `Quick Find` box, then select **Forecasts Settings**.
2. If your organization:
   - Doesn't yet have any forecast types enabled, click **Add a Forecast Type**.
   - Already has at least one forecast type enabled, click **Add Another Forecast Type**. Enable up to four forecast types.
3. From the Forecast Type menu, choose the name of the custom opportunity split type you created based on your custom opportunity field. Revenue is the only forecast measurement available for custom field forecasts.
4. Choose the columns you want to display in the related opportunities list on the Forecast tab for the custom field forecast. Include the Split column to make it easy for forecast users to see the split amounts on each opportunity.
5. Click **OK** and then **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Performance**, **Unlimited**, **Enterprise**, and **Developer** Editions

USER PERMISSIONS

To enable opportunity split types:
- "Customize Application"

To view Forecast Setup:
- "View Setup and Configuration"

To edit Forecast Settings:
- "Customize Application"

Define Your Company's Forecast Date Range

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Forecasts users:

- "Manage Users"

  AND

  "Customize Application"

The Collaborative Forecasts rollup table displays forecast amounts for individual months or quarters and a range of months or quarters, depending on your Collaborative Forecasts settings. Six months or four quarters is the default.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

If you use custom fiscal years, your custom periods or quarters are displayed. Users can forecast up to 12 months or eight quarters in the future or past. If your forecast range includes the current month or quarter, the Forecasts page displays the current month or quarter by default. If not, then the first month or quarter of the range is selected by default.

The forecast date range becomes the default for all Collaborative Forecasts users. Users can use this default or they can set a different date range display for their own forecasts. Once users change their individual forecast date range displays, administrators can't override them. However, when changing the *period* display from monthly to quarterly or quarterly to monthly, the change is reflected in all users' forecasts.

Warning: If you change the period setting from monthly to quarterly or quarterly to monthly, or you change the standard fiscal year, all adjustments and quotas are purged. If you enable custom fiscal years, creating the first custom fiscal year deletes any quotas and adjustments in the corresponding and subsequent standard fiscal years. These changes trigger a forecast recalculation that can take significant time, depending on the quantity of your data.

1. From Setup, enter `Forecasts Settings` in the `Quick Find` box, then select **Forecasts Settings**.
2. Under Configure the Default Forecast Display, use the drop-down lists to select a beginning period and the number of periods you want to display.
3. Click **Save**.

SEE ALSO:

Considerations for Collaborative Forecasts Setup

Selecting Fields that Appear in the Collaborative Forecasts Opportunity Pane

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Tip: If you add an opportunity field to the opportunity pane and it's not visible to Forecasts users, check the field-level security setting for the specific user profile and field. If the forecast is based on that field, the Forecasted Amount column shows the value of the field or the value of the field's split that contributes to the forecast, regardless of field-level security.

When a user selects a forecast amount in the rollup table, the list of opportunities that roll up to that amount appears below the table. Administrators select up to 15 standard and custom fields that appear in the opportunity pane, for each enabled forecast type. Users see the fields selected based on their field level security settings. `Opportunity Name` is a required field. Additionally, we recommend adding `Forecast Category` to the pane.

When selecting fields, keep in mind the fields used in the forecast rollup. An opportunity-quantity forecast rolls up based on the opportunity's `Quantity` field, while opportunity-revenue forecasts roll up based on the opportunity's `Amount` field. For opportunity splits-revenue forecasts, the rollup is based on the opportunity's `Amount` field and the split % assigned to the sales rep. For custom opportunity field forecasts, the rollup is based on the custom field amount. For product families-revenue forecasts, the rollup is based on the sum of the `Total Price` field for all opportunity line items in that product family, while product family-quantity forecasts roll up based on the `Quantity` field for all opportunity line items in that product family. For opportunities without opportunity line items or with line items that don't have a product family specified, the totals roll up into the Products Not Categorized row on the Forecasts page. Depending on whether your forecast type uses the revenue or quantity measurement, consider adding `Amount` or `Quantity` to the pane.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize the opportunity pane:
- "Customize Application"

To view setup and configuration:
- "View Setup and Configuration"

If your forecast data source is opportunities or product families, the Amount field appears by default. If your data source is opportunity splits, the Forecasted Amount and Split % fields appear by default. You can change the selected fields for each forecast type even after it has been enabled.

1. From Setup, enter *`Forecasts Settings`* in the `Quick Find` box, then select **Forecasts Settings**.
2. Click the name of the forecast type whose opportunity fields you want to edit.
3. Under Select fields to display in the list of related opportunities, select fields and click **Add** and **Remove** to move them between the Available Columns list and the Selected Columns list. To determine field order in the layout, select fields and click **Up**, **Down**, **Top**, or **Bottom**.
4. Click **OK**.

SEE ALSO:

Considerations for Collaborative Forecasts Setup

Customize Forecasts Categories

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

A forecast category is the category within the sales cycle that an opportunity is assigned to based on its opportunity stage. The standard forecast categories are Pipeline, Best Case, Commit, Omitted, and Closed. You can customize forecast category names for your organization.

1. From the management settings for opportunities, go to Fields.
2. Click `Forecast Category`.
3. Click **Edit** for any value you want to edit in the Forecasts Category Picklist Values.
4. Enter a forecast category name.
5. Click **Save**.

New forecast category names appear on opportunity records and forecasts.

SEE ALSO:

Considerations for Collaborative Forecasts Setup

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Forecasts users:

- "Manage Users"

  AND

  "Customize Application"

Disable Collaborative Forecasts Functionality

To disable Collaborative Forecasts, first contact Salesforce.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Before disabling Collaborative Forecasts or any of its functionality, be sure you understand how your forecast data will be affected.

Tip: Since disabling certain functionality can result in purged quota and adjustment data, consider exporting your data before disabling anything. When you complete your setting changes, you can import the data back into Salesforce. Note that if you change your period setting from monthly to quarterly or quarterly to monthly, you *cannot* import your quota or adjustments data back into Salesforce because the existing values will not align with your new periods.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

If you disable...	These items are purged...
Collaborative Forecasts	Adjustments Note that your forecast hierarchy stays in place.
A forecast type	Quotas and adjustments for that forecast type
Adjustments	Adjustments
The monthly period setting to use quarterly periods OR The quarterly period setting to use monthly periods	Quotas and adjustments

When adjustments are purged from forecasts, the underlying data on which the forecasts are based remains untouched.

SEE ALSO:

Define Forecasts Settings

Configuring Customizable Forecasts

Setting Up Customizable Forecasting

EDITIONS

Available in: Salesforce Classic

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

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

Sales forecasts represent the best estimate of how much revenue you can generate. They give your managers and executives a view of your overall business no matter how dispersed your sales teams are.

Because forecasting is so universal, customizable forecasting is a flexible solution for even the most advanced requirements. Get started using customizable forecasting in Setup by entering *`Forecasts (Customizable)`* in the `Quick Find` box, then selecting **Forecasts (Customizable)**:

- Click **Edit Forecast settings for your company** to customize the default settings for your organization. See Define Customizable Forecast Settings.
- Click **Batch submit forecasts for your users** to set up batch submission. See Submit Customizable Forecasts in Batches.
- Click **Set up the forecasting hierarchy for your company** to set up your initial forecast hierarchy. Refer to Set Up Your Forecast Hierarchy.

SEE ALSO:

Submit Customizable Forecasts in Batches

Using Product Families

Define Customizable Forecast Settings

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To define forecast settings:
- "Customize Application"

Once you enable Customizable Forecasts for your organization, you need specify the settings that are most appropriate to how you run your business.

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

Define the following settings for your organization:

- **Forecast Data Aggregation** determines the type of data that is displayed on forecasts.
- **Forecast Summary Default View** determines the default product family, date start, date range, and forecast numbers for default forecasts.
- **Forecast Data Sharing** determines whether forecast data can be shared.

To set forecast options:

1. From Setup, enter *`Forecasts`* in the `Quick Find` box, then select **Forecasts Settings**.
2. Select `Forecast Revenue` if you want forecasts to include revenue amount. If you disable this setting, you lose all revenue overrides on your forecasts.

3. Select `Forecast Quantity` if you want forecasts to include quantity totals. If you disable this setting, you lose all quantity overrides on your forecasts.
4. Choose a `Forecast Period`. If you do not have custom fiscal years enabled, choose monthly or quarterly depending on your organization's forecasting cycle. The month or quarter start date is based on Greenwich Mean Time (GMT). If you have enabled custom fiscal years, you can choose to forecast by fiscal period or by fiscal quarter. The forecast period you choose determines the time increment your organization uses for quotas and forecasts. If you choose monthly, you can still see totals by quarters but, if you choose quarterly, monthly forecast totals are not available. If you change this setting, you lose all overrides and forecasts, including all forecast history.
5. Choose a `Forecast Date` that determines how opportunity amounts contribute to forecasts:
   - If you want the entire opportunity amount to contribute to the forecast period for that date, choose `Opportunity Close Date`. If your organization does not use products, this option is the only one available.
   - If you want the amount of the product on the opportunity to contribute to the forecast period that corresponds with the `Product Date`, choose `Product Date`. When no products exist on an opportunity or the product date is blank, Salesforce uses the `Opportunity Close Date` in the user's forecast instead.
   - If you want the individual revenue schedule amounts to contribute to the forecast periods that correspond with the schedule dates, choose `Schedule Date`. If a product does not have a revenue schedule, Salesforce uses the `Product Date` in the user's forecast instead.
6. Choose a `Forecast Type`:
   - Choose `Use Overall Forecast` if your organization does not use products. Your users have one forecast and one quota for each period. If your organization does not use products, this option is the only one available.
   - Choose `Use Product Families` if your users have one quota and one forecast for each product family. See Using Product Families.
7. Choose a default view for your users. This setting determines what forecast product family, date start, date range, and forecast totals to display for users when they first click the Forecasts tab. Users can change their view but the default remains the same for all users.
8. Enable or disable forecast sharing by selecting or deselecting `Enable Forecast Sharing`.
9. Click **Save**.

   If you have enabled forecast sharing, you are prompted to choose who can share existing forecast views. The options are:
   - `Require Administrator assistance for forecast sharing` - Only administrators can share existing forecast data.
   - `Forecast managers can share their own forecast data` - Administrators can share existing forecast data, and existing forecast managers can also share their own views.

   Note: This choice applies to existing forecasting views only; it is not a default setting for your organization. Each time you edit or assign a forecast manager in the role hierarchy, define who can share that view.

   If you have chosen to disable forecast sharing, you are prompted to confirm your choice.

   Customizable Forecasting includes five standard report types. You can't create custom report types with Customizable Forecasting.

SEE ALSO:

Setting Up Customizable Forecasting

Manually Sharing a Forecast

Set Your Fiscal Year for Customizable Forecasting

Set Your Fiscal Year for Customizable Forecasting

Your fiscal year determines your monthly or quarterly forecasting cycle, the month it starts, and whether the `Fiscal Year` is named for the starting or ending year. For example, if your fiscal year starts in April 2015 and ends in March 2016, your fiscal year setting can be either 2015 or 2016.

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

To set your fiscal year for customizable forecasting:

1. Archive your data. We recommend running your weekly or monthly data export before setting the fiscal year, because changing the setting affects your opportunity and forecast data.
2. From Setup, enter *`Fiscal Year`* in the `Quick Find` box, then select **Fiscal Year**.
3. Choose a `Forecast Period` of monthly or quarterly depending on your forecasting cycle. The month or quarter start date is based on Greenwich Mean Time (GMT).

   The forecast period you choose determines the time increment your company uses for quotas and forecasts. If you choose monthly, you can still see totals by quarters but, if you choose quarterly, monthly forecast totals are not available.
4. Choose a `Fiscal Year Start Month` that represents the beginning of your fiscal year.
5. Select a `Fiscal year is based on` option that represents how your company refers to a fiscal year. For example, if your fiscal year starts in April 2015 and ends in March 2016 and is called *Fiscal Year 2016*, choose `The ending month`. The last month determines how your company refers to that fiscal year.
6. If you want to change the fiscal year settings of forecasts created before you enabled customizable forecasts, select `Apply to all forecasts and quotas`. This option changes your historical forecast data.
7. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set fiscal year:
- "Customize Application"

SEE ALSO:

Setting Up Customizable Forecasting

Set Up Your Forecast Hierarchy

Your forecast hierarchy lists all forecast users and determines how their forecasts roll up through your organization. Keep your forecast hierarchy up-to-date to ensure that forecast managers see all subordinates' forecast amounts.

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

Your forecast is based on the role hierarchy by default, or the territory hierarchy if your organization has territory management.

When customizable forecasting is enabled for your organization, it automatically generates a forecast hierarchy based on your organization's role hierarchy. The forecast hierarchy becomes based on your territory hierarchy only when you enable territory management. To customize your forecast hierarchy:

- Make sure that all the appropriate users are in your forecast hierarchy. If any are not and should be, see Enable Users for Customizable Forecasting.
- Make sure that the appropriate users are the assigned forecast manager whenever there is more than one user in a role or territory in your forecast hierarchy. Each user at the bottom of your

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up forecast hierarchy:
- "Customize Application"

forecast hierarchy can be a forecast manager. However, above that, a single user must be chosen as the forecast manager for forecasts to roll up to that user. See Assigning Forecast Managers in Your Forecast Hierarchy.

- Share forecast manager views with other users. See Manually Sharing a Forecast.

Be sure each sales manager with subordinates is designated as a forecast manager in your forecast hierarchy. This ensures that the forecast visibility rolls up to every level of the hierarchy.

If `Nonforecasting` appears next to a role or territory in the forecast hierarchy, it means that a forecast manager has not been assigned to that role or territory.

Note: When you remove a user from the forecast hierarchy or the role hierarchy, all their quota and override data is permanently deleted.

SEE ALSO:

Setting Up Customizable Forecasting

Set Up Your Forecast Hierarchy

Manually Sharing a Forecast

Enable Users for Customizable Forecasting

To give users access to sales forecasts, add them to the forecast hierarchy and give them the Allow Forecasting permission.

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

To enable users for customizable forecasting if your organization does not use territory management:

1. From Setup, enter *`Forecasts Hierarchy`* in the `Quick Find` box, then select **Forecasts Hierarchy**.
2. To view a list of users assigned to a level, click **Enable Users** next to a role at that level.
3. To enable the user for customizable forecasting, select a user and click **Add**. To disable a user, select the user and click **Remove**.
4. Click **Save**.

Note: When you remove a user from the forecast hierarchy or the role hierarchy, all their quota and override data is permanently deleted.

To enable a user for customizable forecasting if your organization uses territory management:

1. From Setup, enter *`Users`* in the `Quick Find` box, then select **Users**.
2. Click **Edit** next to the user's name.
3. Select **Allow Forecasting**.
4. Click **Save**.
5. Add the user to a territory.

Customizable Forecasting includes five standard report types. You can’t create custom report types with Customizable Forecasting.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up forecast hierarchy:
- “Customize Application”

Note: To view a list of users for a territory, select the territory name in the territory hierarchy or run a territory report. For more information on territory reports, see Territory Reports.

If you add multiple users to a role or territory, assign only one as the forecast manager for that role or territory. See Assigning Forecast Managers in Your Forecast Hierarchy

SEE ALSO:

- Setting Up Customizable Forecasting
- Setting Up Customizable Forecasting
- Enable Territory Management
- Manually Sharing a Forecast

Assigning Forecast Managers in Your Forecast Hierarchy

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up forecast hierarchy:
- "Customize Application"

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

After users are enabled for customizable forecasting, assign a user as a forecast manager for each role in your forecast hierarchy. Assigning someone as a forecast manager means that all forecasts from users below that user in the forecast hierarchy roll up to that person. For example, an executive and executive assistant may have the same role, but the executive is the assigned forecast manager in the forecast hierarchy because all subordinates' forecasts roll up to the executive. Both the executive and executive assistant can submit forecasts, but forecasts of other users do not roll up to the executive assistant.

If a role in the forecast hierarchy has no forecast manager, that role and all its subordinate roles are not included in your forecasts.

If `Nonforecasting` appears next to a role or territory in the forecast hierarchy, it means that a forecast manager has not been assigned to that role or territory.

1. From Setup, enter *`Forecasts (Customizable)`* in the `Quick Find` box, then select **Forecasts Hierarchy**.
2. Click **Assign Manager** or **Edit Manager** next to a role to assign a user as the forecast manager of that role.

   Roles without roles below them cannot have forecast managers unless your organization has territory management, which supports forecast managers at all levels.

3. Choose a user to be assigned as the forecast manager of the selected role. If no users are available for the role, enable the appropriate user; see Enable Users for Customizable Forecasting.
4. If forecast sharing is enabled, choose the sharing settings:
   - Choose `Require Administrator assistance for forecast sharing` to limit forecast sharing for this view to administrators. This is the default option.
   - Choose `Forecast managers can share their own forecast views` to allow the administrator or the forecast manager to share this view.

5. Click **Save**.

SEE ALSO:

Setting Up Customizable Forecasting

Set Up Your Forecast Hierarchy

Manually Sharing a Forecast

Enabling Customizable Forecasting

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

Enabling customizable forecasting for your organization allows your forecast users to view and submit their customizable forecasts from the Forecasts tab based on your customizable forecast settings. Customizable Forecasting includes five standard report types. You can't create custom report types with Customizable Forecasting.

1. From Setup, enter *`Forecasts Hierarchy`* in the `Quick Find` box, then select **Forecasts Hierarchy**.
2. Click **Enable Customizable Forecasting**. If this option is not available, customizable forecasting is already enabled for your organization. After you enable customizable forecasting, three new user permissions are available:

Permission	Description
Override Forecasts	Allows users to override their own forecasts and forecasts for users below them in the forecast hierarchy. All standard profiles except Read Only receive this permission.
Edit Personal Quota	Allows users to change their individual quotas. All standard profiles except Read Only receive this permission. Users with the "Manage Users" permission can always edit any quota. Users can always edit the quotas of users that report directly to them.
View All Forecasts	Allows users to view any forecast regardless of their place in the forecast hierarchy. The System Administrator profile includes this permission.

3. Choose the appropriate opportunity page layouts that you want to include the new Opportunity Forecasts related list. Optionally, choose the `Append...` option to add this related list to page layouts even if users have customized them.
4. Click **Save**.
5. Enable or disable these permissions where necessary..

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable customizable forecasts:

- "Customize Application"

Note: With customizable forecasts, your forecasts still depend on how your `Opportunity Stage` picklist values map to Forecast Categories.

SEE ALSO:

Setting Up Customizable Forecasting

Enable Territory Management

Manually Sharing a Forecast

Manually Sharing a Forecast

EDITIONS

Available in: Salesforce Classic

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

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

Your administrator defines your organization's forecasting hierarchy, which determines which users can view the forecast data. However, your administrator can manually extend sharing privileges for forecast data, and you may be able to manually extend sharing privileges for your own forecast data as well. Manual forecast sharing can only increase access to forecast data; it cannot restrict access for users who already have access. To manually share a forecast, you must be an administrator or a forecast manager who has been given access to share your forecast data.

To see which users can view your forecast or to share your forecast data, do one of the following:

- From Setup, enter *`Forecasts Hierarchy`* in the `Quick Find` box, then select **Forecasts Hierarchy**, then click **Share** next to the view you want to share.
- Click **Sharing** on the forecast home page to share your own forecast data.

The User and Group Sharing list shows you all the users who currently have access to this forecast data. It also details the level of access they have, whether they can submit a forecast, and the reason they have that access. The reasons a user might have access to forecast data are:

Reason	Description
Administrator	The user is an administrator, or has the “Modify All Data” permission.
Delegated Forecast Manager	A user has access to forecast data that was granted via the **Sharing** button on the forecast.
Forecast Manager	A user has access due to being a forecast manager in the forecast hierarchy.
Owner	The owner can always see his or her own forecast data.
View All Forecasts Permission	The user has the “View All Forecasts” permission.

On the Forecast Sharing Detail page, you can do any of the following:

- To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views.To edit or delete any view you created, select it from the `View` drop-down list and click **Edit**.
- Click **Add** to grant other users or groups access to the forecast data.

  Note: Manual sharing extends to the opportunity data that makes up the forecast. If a user has permission to override forecast data, then the user also has permission to override the opportunity forecast data.

- Click **Expand List** to view all users that have access to the forecast data.
- For manual sharing rules that you created, click **Edit** or **Del** next to an item in the list to edit or delete the access level.

SEE ALSO:

Setting Up Customizable Forecasting

Submit Customizable Forecasts in Batches

Submitting forecasts takes a snapshot of forecast data and makes that data available in forecast history and reports. Save time by submitting multiple forecast at once.

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

To submit multiple forecasts at once:

1. From Setup, enter `Batch Submit` in the `Quick Find` box, then select **Batch Submit Forecasts**.
2. Choose the appropriate forecast period.
3. Select the users that have forecasts you want to submit and click **Add** to add them to the list of `Selected Users for Batch Submit`. Select more than one at a time using **CTRL**+click.
4. Click **Submit**.
5. Click **OK**.

Users can also submit their forecasts individually by clicking **Submit** from their forecast.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To submit forecasts in batches:
- "Modify All Data"

SEE ALSO:

Setting Up Customizable Forecasting

Enabling Business Networks for Collaboration Across Organizations

Enable Salesforce to Salesforce

EDITIONS

Available in: Salesforce Classic

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Salesforce to Salesforce:

- "Modify All Data"

> Warning: Enabling Salesforce to Salesforce is not reversible, however, you control the information you share and the connections you share with. You can stop sharing or modify sharing settings at any time. By enabling Salesforce to Salesforce, you agree to allow salesforce.com to process updates to information in your organization that is shared with other organizations. Salesforce to Salesforce allows you to share your data with third-party recipients, and those recipients may in turn use Salesforce to Salesforce to share your data with further third-party recipients unknown to you. You are responsible for ensuring that appropriate contractual or other legal arrangements are in place between you and your recipients to limit those recipients' use and disclosure of your shared data.

To enable Salesforce to Salesforce:

1. From Setup, enter `Salesforce to Salesforce Settings` in the `Quick Find` box, then select **Salesforce to Salesforce Settings**.
2. Click **Edit**.
3. Select `Enable`.
4. Click **Save**.

When you enable Salesforce to Salesforce, a new user named "Connection User" is created. This user does not count towards the number of used licenses for your organization, and is not included in any user management view.

When your business partner updates a shared record, the `Last Modified By` field on the record in your organization displays `Connection User`, allowing you to easily track all changes made by your business partners.

The Connection User is automatically assigned to the Partner Network profile. The Partner Network profile cannot be modified and is not included in any profile management view.

After Salesforce to Salesforce is enabled:

1. Create a permission set with the "Manage Connections" permission enabled and the Connection tab set to `Visible`, and assign the permission set to users who will be working with Salesforce to Salesforce connections.

   We also recommend giving the "Manage Queues" user permission to all users with the "Manage Connections" user permission. This lets users create and manage queues for connections without needing assistance from an administrator.

2. Configure Salesforce to Salesforce settings, such as communication templates for sending invitations to your business partners.
3. Add the External Sharing related list to page layouts for the appropriate profiles.

   > Note: This related list can be made available to all users, not just users with the "Manage Connections" permission.

4. Optionally, create custom list views on the External Sharing related list and give access to the appropriate users, so that they can view and accept shared records.
5. Optionally add the Received Connection Name and Sent Connection Name columns to the related lists on the page layouts of the desired objects.
6. Create and manage connections with your business partners.

Configure Salesforce to Salesforce

You can configure Salesforce to Salesforce to use communication templates for interacting with your business partners. In addition, you can configure the email address and name used on the templates. To configure any of these settings:

1. From Setup, enter *`Salesforce to Salesforce Settings`* in the `Quick Find` box, then select **Salesforce to Salesforce Settings**.
2. Click **Edit** and modify the following settings:

Setting	Description
`From Email Address`	The email address from which all Salesforce to Salesforce communication templates are sent, for example, "partner@acme.com." Salesforce sends the emails automatically, but they appear to your contacts as if they were sent from this email address. If a contact responds to a communication template, the response is sent to this address.
`From Email Name`	The name that will be associated with the "From" Email Address, for example, "Acme Channel Manager".
`Invitation Template`	Used to send invitations.
`Deactivation Template`	Used to notify a business partner that you have deactivated the connection.
`Accept Invitation Template`	Used to notify a business partner that you have accepted an invitation.
`Reject Invitation Template`	Used to notify a business partner that you have not accepted an invitation.
`Update Connection Profile Template`	Used to notify business partners of changes to an active connection profile.

3. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To configure Salesforce to Salesforce:
- "Modify All Data"

Setting Up Salesforce-Integrated Email

Email Editions and Permissions

Salesforce email and templates are available in several editions. Enable the feature and manage permissions and access at the organization level and for administrators and end users.

EDITIONS

Available in: Salesforce Lightning Experience

Developer, Enterprise, Professional, Performance, and Unlimited editions

Organization Level	Permissions and Access Requirements
Use Email in Lightning Experience:	• Lightning Experience enabled. • Send Email action added to Lightning Actions on page layouts for objects that support Lightning Email.
Send all types of outbound email:	`Access to Send Email` access level set to *`All email`*.
Send attachments:	• Content Deliveries enabled to upload files larger than 3 MB. If Content Delivery is not enabled, users cannot upload files larger than 3 MB. • Salesforce Files enabled to send files. If Salesforce Files is not enabled, you can only send attachments.
View sent emails as tasks:	Shared Activities enabled. If Shared Activities is not enabled and a user sends email to multiple contacts, Salesforce creates duplicate closed tasks: one for each of those contacts.

Administrator	Permissions and Access Requirements
Create an email template:	"Send Email" permission.
Attach a file to a template or email:	Access to the file you're attaching.
Delete a template created by someone else:	"View All Data" permission.
Send email:	Before sending email for the first time, all administrators must verify their email addresses. Just follow the prompt.

User	Preferences and Permissions Required
Create an email template:	"Send Email" permission.
Add merge fields to a template or email:	Access to the fields on the applicable object.
Attach a file to a template or email:	Access to the file you're attaching.

User	Preferences and Permissions Required
Delete a template you created:	None.
Send email:	• "Send Email" permission. • Before sending email for the first time, all administrators and users must verify their email addresses. Just follow the prompt.

SEE ALSO:

Configure the Email Action in the Activity Composer in Lightning Experience

Setting Up Email Relaying

Email relaying is using an email server to send email that did not originate on the email server. Companies set up email relaying to:

- Route all email through their own email servers to avoid the appearance of email spoofing by Salesforce. Email spoofing is the forging of email headers to make messages appear as if they came from someone other than the original sender.
- Store copies of all email as required by government regulations in various industries.
- Apply existing content filters that scan messages for data and content that is not approved to be sent out through company email.
- Run outbound email through antivirus software before sending it to customers.
- Append data such as company-wide disclaimers at the bottom of email messages.

You can set up email relaying for Salesforce-generated email by configuring Salesforce to automatically route email through your company's Simple Mail Transfer Protocol (SMTP) server. Contact Salesforce to enable email relaying for your organization.

Warning: If you plan to activate both bounce management and email relaying, check with your email administrator to ensure that your organization's email server allows the relaying of email sent from Salesforce; otherwise, the email you send from Salesforce may not get delivered. For more information on bounce management, see Configure Deliverability Settings on page 277.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To configure email relaying:
- "Modify All Data"

To set up email relaying:

1. From Setup, enter *`Email Relay Activation`* in the `Quick Find` box, then select **Email Relay Activation**.
2. Configure the following settings:

Setting	Description
`Email Host`	The host name or IP address of your company's SMTP server. Obtain this information from your email administrator. Important: If you plan to use Transport Layer Security (TLS) with this connection, enter the host name instead of the IP address. TLS requires the host name for verifying certificates.

Setting	Description

	For host names, use the following format:
	`<mail server>.<domain>.<domain extension>`
	For example:
	`mail.acme.com`

`Port`	The port number of your company's SMTP server. Obtain this information from your email administrator. Email relaying is supported on port numbers 25, 587, 10025, and 11025.
`TLS Setting`	Specifies whether Salesforce uses TLS for SMTP sessions. Select one of the following options: • `Preferred` (default): If the remote server offers TLS, Salesforce upgrades the current SMTP session to use TLS. If TLS is unavailable, Salesforce continues the session without TLS. • `Required`: Salesforce continues the session only if the remote server offers TLS. If TLS is unavailable, Salesforce terminates the session without delivering the email. • `Preferred Verify`: If the remote server offers TLS, Salesforce upgrades the current SMTP session to use TLS. Before the session initiates, Salesforce verifies the certificate is signed by a valid certificate authority, and that the common name presented in the certificate matches the domain or mail exchange of the current connection. If TLS is available but the certificate is not signed or the common name does not match, Salesforce disconnects the session and does not deliver the email. If TLS is unavailable, Salesforce continues the session without TLS. • `Required Verify`: Salesforce continues the session only if the remote server offers TLS, the certificate is signed by a valid certificate authority, and the common name presented in the certificate matches the domain or mail exchange to which Salesforce is connected. If any of these criteria are not met, Salesforce terminates the session without delivering the email.
`Restrict Relay to Domains`	Specifies whether to restrict the email relaying functionality to certain domains. If you select this option, enter the names of those domains separated by commas in the text field below. (The asterisk (`*`) wildcard is allowed; for example, `*.subdomains.com` matches john@aco.subdomains.com and john@bco.subdomains.com (but not john@subdomains.com)). This causes Salesforce to route email to your company's SMTP server only if the email is addressed to one of the listed domains. If you select the checkbox but do not

Setting	Description
	list any domains, Salesforce routes all email to your company's SMTP server.
`Active`	Enables email relaying for your organization. If you deselect this checkbox, Salesforce keeps the email relay configuration but does not route email to your company's email server.

3. Click **Save**.

Salesforce recommends sending a test message each time you change the email relay configuration.

SEE ALSO:

Testing Email Deliverability

Enabling Compliance BCC Emails

Configure Deliverability Settings

Organization-Wide Addresses

Enable Email to Salesforce

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To enable or disable Email to Salesforce:

- "Modify All Data"

Let your users add email to Salesforce records. Email to Salesforce lets users assign emails to leads, contacts, and opportunities, or to other specific records in Salesforce. That way, it's easy to track sales-related communications.

1. From your personal settings, enter `Email to Salesforce` in the `Quick Find` box, then select **My Email to Salesforce**.
2. Click **Edit**.
3. Select the **Active** checkbox.
4. Optionally, select the `Advanced Email Security Settings` checkbox to configure Email to Salesforce to verify the legitimacy of the sending server before processing a message. Email to Salesforce uses the following authentication protocols to verify the sender's legitimacy:
   - SPF
   - SenderId
   - DomainKeys

   If the sending server passes at least one of these protocols and does not fail any protocols, Email to Salesforce accepts the email. If the server fails a protocol or does not support any of the protocols, Email to Salesforce ignores the email.

   Tip: Before you select `Advanced Email Security Settings`, ensure that the senders you expect to use Email to Salesforce support at least one of the listed authentication protocols.
5. Click **Save**.
6. Optionally, click **Send Notification Email** to notify users that Email to Salesforce is activated, or click **Skip This Step**.

After enabling Email to Salesforce, Salesforce creates a unique Email to Salesforce address for each user. To view their unique Email to Salesforce address and customize their settings, users can go to the My Email to Salesforce page in their personal settings. For more information, see How Does Email to Salesforce Work?.

Enabling Compliance BCC Emails

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable or disable compliance BCC email:
- "Customize Application"

If your organization evaluates all outbound email messages for compliance, you can enable compliance BCC emails to automatically send a hidden copy of each outbound email message to an email address you specify. Enabling compliance BCC emails prevents users from editing the BCC field on any email and disables their `Automatic Bcc` setting under My Email Settings.

To enable compliance BCC emails for your organization:

1. From Setup, enter *`Compliance BCC Email`* in the `Quick Find` box, then select **Compliance BCC Email**.
2. Select the `Enable` checkbox.
3. Enter your compliance email address.
4. Click **Save**.

Note: The BCC email is automatically sent to the address you specify for any emails your users send, excluding system emails such as password reset or import completion notifications.

Configure Deliverability Settings

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To configure email deliverability:
- "Customize Application"

To improve the deliverability of email you send from Salesforce, configure your organization's email deliverability settings. Email deliverability is the likelihood of a company's or individual's email reaching its intended recipient. This likelihood is adversely affected by:

Bounced email

Email that is addressed to an invalid recipient and returned to the sender. If a sender sends several email messages that bounce, the email server might slow or block the delivery of all email from that sender.

Noncompliant email

Email that does not comply with a recipient's email security framework, such as the Sender Policy Framework (SPF), which verifies that the `From` address in an email message is not forged.

Warning: If you plan to activate both bounce management and email relaying, check with your email administrator to ensure that your organization's email server allows the relaying of email sent from Salesforce; otherwise, the email you send from Salesforce may not get delivered. For information on email relaying, see Setting Up Email Relaying on page 274.

To configure the email deliverability settings for your organization:

1. From Setup, enter *`Deliverability`* in the `Quick Find` box, then select **Deliverability**.
2. To control the type of email your organization sends, change the `Access level` in the Access to Send Email section. You may not be able to edit the Access level if Salesforce has restricted your organization's ability to change this setting.
   - `No access`: Prevents all outbound email to and from users.
   - `System email only`: Allows only automatically generated emails, such as new user and password reset emails.
   - `All email`: Allows all types of outbound email. Default for new, non-sandbox organizations.

   Tip: The `System email only` setting is especially useful for controlling email sent from sandboxes so that testing and development work doesn't send test emails to your users.

   - Newly created sandboxes default to `System email only`.

- Sandboxes created before Spring '13 default to `All email`.

3. Select the `Activate bounce management` checkbox to help ensure that the email addresses you have for your contacts, leads, and person accounts are correct, and that the email your users send to those addresses is not impeded due to excessive email bounces.

   When bounce management is activated and a user sends an email to a contact, lead, or person account with an invalid email address, Salesforce displays an alert next to that email address and prevents users from sending email to the address until it is updated or confirmed. Also, the email bounces to Salesforce instead of the sender's personal email account.

   Tip: Use the Bounced Contacts and Bounced Leads standard reports to view a list of email all addresses that have bounced email. The report includes the reason the email was bounced, the date the bounce occurred, and the contact, lead, or person account that bounced the email.

4. Select the `Show bounce alert next to all instances of the email address` checkbox to configure Salesforce to search all lead, contact, and person account records for instances of any email address that bounces an email and to display a bounce alert next to each instance. If you do not select this option, Salesforce only displays the bounce alert on the record from which the email was originally sent.
5. Select the `Return bounced email to sender` checkbox to configure Salesforce to send a copy of the bounced email header to the sender. If you do not select this option, only Salesforce receives the bounced email header. In either case, for security purposes Salesforce does not return the body of the bounced email to the sender. This option applies to all users in your organization and cannot be enabled per user or per email.
6. Select the `Enable compliance with standard email security mechanisms` checkbox to automatically modify the envelope `From` address of every email you send from Salesforce to comply with email security frameworks that your recipients might implement, such as SPF.

   Many recipient email systems enforce SPF to verify whether an email is legitimate. SPF checks the envelope `From` address of an inbound email to verify legitimacy. If this feature is enabled, Salesforce changes the envelope `From` address to a Salesforce email address to verify the sender's legitimacy. The header `From` address remains set to the sender's email address.

   Note: For more information on SPF, see www.openspf.org.

7. Select the `Enable Sender ID compliance` checkbox to comply with the Sender ID framework. This will automatically populate the `Sender` field in the envelope of every email you send from Salesforce with `no-reply@Salesforce`. This enables receiving mail servers using the Sender ID email authentication protocol to verify the sender of an email by examining the `Sender` and `From` headers of an inbound email through a DNS lookup. All replies will still be delivered to the sender's email address. If you do not select this checkbox, the `Sender` field is set to `null` and email delivery fails when a recipient email system performs a Sender ID check.

   Note:

   - We recommend enabling Sender ID compliance only if you have recipients using the Sender ID email authentication protocol, which isn't widely used.
   - If you enable Sender ID compliance, the recipient's email client (not Salesforce) may append the phrase "Sent on behalf of" to the `From` field of email received from Salesforce.
   - For more information on Sender ID, see www.microsoft.com/mscorp/safety/technologies/senderid/default.mspx.

8. If you want Salesforce to send users a status email when their mass emails are complete, select `Notify sender when mass email completes`.
9. To specify how Salesforce uses the Transport Layer Security (TLS) protocol for secure email communication for SMTP sessions, choose one of the following:

- `Preferred` (default): If the remote server offers TLS, Salesforce upgrades the current SMTP session to use TLS. If TLS is unavailable, Salesforce continues the session without TLS.
- `Required`: Salesforce continues the session only if the remote server offers TLS. If TLS is unavailable, Salesforce terminates the session without delivering the email.
- `Preferred Verify`: If the remote server offers TLS, Salesforce upgrades the current SMTP session to use TLS. Before the session initiates, Salesforce verifies the certificate is signed by a valid certificate authority, and that the common name presented in the certificate matches the domain or mail exchange of the current connection. If TLS is available but the certificate is not signed or the common name does not match, Salesforce disconnects the session and does not deliver the email. If TLS is unavailable, Salesforce continues the session without TLS.
- `Required Verify`: Salesforce continues the session only if the remote server offers TLS, the certificate is signed by a valid certificate authority, and the common name presented in the certificate matches the domain or mail exchange to which Salesforce is connected. If any of these criteria are not met, Salesforce terminates the session without delivering the email.

Note: If you select a setting other than `Preferred` (the default setting), select `Restrict TLS to these domains` and specify a comma-separated domain list. The asterisk (`*`) wildcard is allowed; for example, `*.subdomains.com` matches john@aco.subdomains.com and john@bco.subdomains.com (but not john@subdomains.com). If you don't specify domains, Salesforce uses the TLS setting you specify for all outbound emails, which may result in emails not being delivered.

10. Click **Save**.

SEE ALSO:

Enabling Compliance BCC Emails

Setting Up Email Relaying

Testing Email Deliverability

Organization-Wide Addresses

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To configure organization-wide addresses:
- "Modify All Data"

If your organization requires users to share a common email alias, you can define a list of *organization-wide addresses* for each user profile. Organization-wide addresses define a common email address that a user profile can use. When sending email from Salesforce, users with these profiles can choose a different `From` address than the email address they have defined. Replies are delivered to the organization-wide address.

For example, assume your organization has several users under a single Support Profile. A Support Profile can be associated with an email address called `support@acme.com` and a `Display Name` of `Acme Support`. When Support Profile users send an outbound email through Salesforce, they can choose to have their `From` address appear as `support@acme.com` instead of their own Salesforce email address.

After an organization-wide address is verified, it is available as a `From` address when sending an email or an email alert.

To display the list of defined organization-wide addresses, from Setup, enter `Organization-Wide Addresses` in the `Quick Find` box, then select **Organization-Wide Addresses**. From this page you can:

- Click **Add** to create a new organization-wide address.
- Click **Edit** to change any of the fields associated with the alias:
  - `Display Name` is the word or phrase users who receive your email will see as the sender of the email.
  - `Email Address` is the email address that is used when sending an outbound email.

  - `Allowed Profiles` lists the profiles which use the email address as an alias.
  - `Status` shows the current stage of verification. When you add a new organization-wide address, it must be verified as a valid email address before becoming available for use. If you have not received your verification email, click **Resend** to have another one sent.
- Click **Del** to remove the alias.

> Note: You cannot use an organization-wide address to send a mass email or a Stay-in-Touch request. You cannot delete or change an organization-wide email address if it is used by an email alert. Organization-wide addresses can't be used in scheduled reports, scheduling dashboards for refresh, sending mail merge emails, and sending meeting requests to contacts and leads.

SEE ALSO:

Managing Organization-Wide Email Footers

Defining Organization-Wide Addresses

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To configure organization-wide addresses:

- "Modify All Data"

To define an organization-wide address for a user profile:

1. From Setup, enter *`Organization-Wide Addresses`* in the `Quick Find` box, then select **Organization-Wide Addresses**.
2. Click **Add**.
3. Enter a **Display Name**. The display name identifies how your name appears on outbound emails. The maximum length is 300 characters.
4. Enter the **Email Address** you would like to use as an alias. This can be any standard email address. The maximum length is 270 characters.
5. Select `Allow All Profiles to Use this From Address` if you want every user profile in your organization to be able to use the new `From` address. Otherwise, select `Allow Only Selected Profiles to Use this From Address` to choose from existing user profiles.
6. Click **Save** to save your changes, or **Save and New** to define another organization-wide address. A verification email is sent to the new email address which includes a link that you click to complete the verification process. The `From` address will not be available for use until you access the email and click this link. Click **Cancel** to return to the previous page without saving.

> Note: Organization-wide addresses can't be used in scheduled reports, scheduling dashboards for refresh, sending mail merge emails, and sending meeting requests to contacts and leads.

To use an organization-wide address, send an email or set up an email alert, and choose your organization-wide address from the drop-down list.

Managing Organization-Wide Email Footers

You can create personalized footers or disclaimers that appear at the bottom of all outgoing email messages sent from Salesforce or the API. You can create a separate email footer for each encoding and choose default footers for single and mass email. The defaults are used when no footer matches an outgoing email's encoding.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create and edit email footers:
- "Modify All Data"

Creating Email Footers

1. From Setup, enter `Email Footers` in the `Quick Find` box, then select **Email Footers**.
2. Click **New**.
3. Enter a name.
4. Choose if you want the footer to be available for single emails, mass emails, or both.
5. Select the email encoding. The email encoding determines which emails the footer appears on. For each encoding you can have one active single email footer and one active mass email footer.
6. Enter the text of the footer.

Note: Footers are text only; HTML tags aren't rendered. Maximum is 32 KB.

Editing Email Footers

1. From Setup, enter `Email Footers` in the `Quick Find` box, then select **Email Footers**.
2. To edit an email footer, either click **Edit** next to a footer or on the footer detail page.
3. Edit the footer information and click **Save**.

Choosing Default Email Footers

You can choose one default footer for single email and one for mass email. These defaults are used when no footer matches an outgoing email's encoding.

1. From Setup, enter `Email Footers` in the `Quick Find` box, then select **Email Footers**.
2. Using `Default for Single Mail` and `Default for Mass Mail`, select default footers.
3. Click **Save**.

Note: If you don't click **Save**, your default footer choice is lost when you leave the page.

Deactivating Email Footers

You can deactivate an email footer without deleting it.

1. From Setup, enter `Email Footers` in the `Quick Find` box, then select **Email Footers**.
2. Uncheck the `Single` and `Mass` checkboxes next to the footer.
3. Click **Save**.

Testing Email Deliverability

Salesforce sends email from many different IP addresses. The number of addresses depends on your data center and appears on the Test Deliverability page. If your organization blocks any of these IP addresses, users might not receive all email sent from Salesforce. You can check whether your organization is receiving email from every Salesforce IP address.

1. From Setup, enter `Test Deliverability` in the `Quick Find` box, then select **Test Deliverability**.
2. Enter your business email address.
3. Click **Send**. Salesforce sends a test message from all IP addresses to your business email address. Each test message specifies the IP address from which it was sent.
4. To make sure that you received all test messages, check your business email account.

If you didn't receive all the test messages, your organization's email administrator must whitelist the Salesforce IP ranges on your organization's email server. Whitelisting an IP address allows the email server to receive email from an IP address that is otherwise blocked. For a current list of Salesforce IP ranges, see What are the Salesforce IP Addresses to whitelist?.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To test email deliverability:
- "Modify All Data"

Salesforce maintains separate IP addresses for inbound and outbound email. The IP addresses used for outbound email don't accept inbound email connections.

SEE ALSO:

Configure Deliverability Settings

Enabling Compliance BCC Emails

Deleting Email Attachments Sent as Links

You can find and delete attachments sent as links. Recipients who subsequently click on the attachment link see a message asking them to contact the email sender to view the attachment. You can search only within your organization's email retention period (typically 30 days, but contact Salesforce Support for your organization's details).

To find and delete email attachments sent as links:

1. From Setup, enter `Attachments` in the `Quick Find` box, then select **Delete Attachments Sent as Links**.
2. Enter either of these.
    - File name (optional), username, and date range:
        - Optionally, attachment file name, including the file extension (for example, `ThisYearResults.pdf`). You can use wildcards (for example, `ThisYearRes` would find `ThisYearResults.pdf`).
        - Sender's username
        - Date range during which the email was sent
    - Attachment URL: Click the attachment link (`.html`) in the email to open it in a browser, and copy and paste the URL.
3. Click **Search**.
    - Search results show up to 100 matching entries.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To delete email attachments sent as links:
- "Modify All Data"

- If the attachment was sent using mass email, search results show one entry for every 100 emails sent—delete one of these entries to delete the attachment.

4. In Search Results, click **Del** next to the attachment you want to delete. Recipients who subsequently click on the attachment link see a message asking them to contact the email sender to view the attachment.

   Note: You cannot recover deleted attachments from the Recycle Bin.

Monitoring the Mass Email Queue

EDITIONS

Available in: Salesforce Classic

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To view your mass email or cancel your pending mass email:
- "Mass Email"

To view all mass email or cancel pending mass email in your organization:
- "Modify All Data"

Use the mass email queue to view the status of scheduled mass emails and cancel mass emails if necessary.

You can view the mass emails that you've scheduled on the Mass Emails page in your personal settings. If you have permission to view all mass emails in your organization, from Setup, enter *`Mass Emails`* in the `Quick Find` box, then select **Mass Emails**.

From these pages, you can:

- Click **Cancel** to cancel a pending mass email.
- Click **Stop** to stop a mass email that Salesforce is in the process of sending.
- Click **Del** to delete the record of a sent or canceled mass email from the queue.
- Click the name of the mass email to view details about an individual mass email.

The mass email queue shows the number of recipients that the mass email was addressed to and sent to. These numbers may differ because:

- The mass email would cause your organization to exceed its daily mass email limit. Salesforce does not send the message to any of the intended recipients in this case.
- One or more selected recipients opted out of receiving mass email after the mass email was scheduled but before it was processed.
- One or more selected recipient email addresses were removed from the contact or lead after the mass email was scheduled but before it was processed.
- The user who sent the mass email was deactivated after the mass email was scheduled but before it was processed. Salesforce does not send mass emails scheduled by a user who is deactivated.

Create a DKIM Key

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

Manage DKIM Keys
- Customize Application

Use the DKIM (DomainKeys Identified Mail) key feature to enable Salesforce to sign outbound emails sent on your organization's behalf. A valid signature provides recipients confidence that the email was handled by a third party such as Salesforce in a way authorized by your organization.

When you create a DKIM key, Salesforce generates a public and private key pair. You must publish the public key in the DNS, which tells recipients that you, as the owner of the domain, have authorized the use of this key to sign your mail. Salesforce uses the private key to create DKIM signature headers on your outgoing email. Then, recipients of the mail, can compare the signature header with the public key in the DNS to determine that the mail was signed with an authorized key. If your domain also publishes a Domain-based Message Authentication, Reporting and Conformance (DMARC) policy, recipients can use the DKIM signature to verify that the mail conforms to DMARC.

To create a new key:

1. From Setup, enter `DKIM Keys` in the `Quick Find` box, then select **DKIM Keys**.
2. Click **Create New Key**.
3. For Selector, enter a unique name.
4. Enter your Domain name.
5. Select the type of Domain Match you'd like to use.
6. Click **Save**.

- The key defaults to Inactive state. Make sure you add the public key to the DNS record before activating the key. DKIM signing is active whenever you have an active DKIM key.
- You can't have more than one active DKIM key per domain name. You might have multiple active DKIM keys if your organization sends mail from more than a single domain or if you use `subdomains` under your organizational domain and have specified domain matching at the `subdomain` level.
- When you insert or update a domain key, it's possible that the change affects existing DKIM keys. For example, if you've set `DomainMatch` to `DomainAndSubdomains` for the example.com domain, and you then set `DomainMatch` to `SubdomainsOnly` for the mail.example.com domain, either key could be used. Here's how we resolve conflicts in the case when domain keys overlap.
  1. If two keys are equally specific about matching for the same domain, the new key replaces and deactivates the existing key.
  2. If a new key is more specific about matching than an existing key, the new key is used and the existing key is modified to no longer apply to the case covered by the new key. For example, because `DomainOnly` and `SubdomainsOnly` are more specific than `DomainAndSubdomains`, a new `DomainOnly` key would change the `DomainMatch` for an existing `DomainAndSubdomains` key to become `SubdomainsOnly`.
  3. If multiple keys have different domains that match the sending domain, the key with the longest domain name is used. In case of a tie, the most specific key is used.

For information about DKIM, see http://dkim.org

Import a DKIM Key

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To manage DKIM Keys
- Customize Application

Use the DKIM (DomainKeys Identified Mail) key feature to enable Salesforce to sign outbound emails sent on your organization's behalf.

Some companies have multiple Salesforce organizations, and users in those organizations share a domain name in their email address. Therefore, companies that want Salesforce to sign the email sent by those users sometimes want to share DKIM keys. You can do that using this page.

First, create the key and ensure it's working for one organization. To import and use it in another organization, copy the selector name, domain name, and public and private key data from the working key. You can get this data from the detail page for the key you want to import. After you've copied the key data, log in to the target organization and follow these steps to import the key.

1. From Setup, enter `DKIM Keys` in the `Quick Find` box, then select **DKIM Keys**.
2. Click **Import a Key**.
3. Enter the same selector name you copied from the original organization.
4. Enter the same domain name you copied from the original organization.
5. Paste in the public and private key data you copied into their respective fields.
6. Select the type of Domain Match you'd like to use. Most likely you'll use the same value that was selected for the key in the original organization.

7. Click **Save**.

Because the public and private key data worked for the original organization, you can typically activate the key in the target organization immediately.

Note: The private key data is an encrypted form of the private key data that's used to sign emails. It's decrypted internally when signing emails. Therefore, it can be used only within Salesforce. For example, you can't take the public and private key data and plug it into an external mail system.

Working with Mail Merge Templates

Managing Mail Merge Templates

Mail merge templates define the content of a form letter or other mail merge document. They include variables called merge fields where data from your records—for example a contact's name and address—displays in the generated document.

As an administrator, you're responsible for building mail merge templates in Microsoft Word and uploading them to Salesforce to make them available for your users. See the following topics:

- Create Mail Merge Templates explains how to build a new mail merge template from a blank Word document.
- Modify Existing Mail Merge Templates explains how to download sample templates and modify them to meet your unique business needs.
- Uploading Mail Merge Templates to Salesforce explains how to upload completed mail merge templates to Salesforce.

Tip: Download sample mail merge templates to help you get started.

SEE ALSO:

Considerations for Using Merge Fields in Mail Merge Templates

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To upload mail merge templates:
- "Manage Public Templates"

To edit mail merge templates:
- "Manage Public Templates"

Create Visualforce Email Templates

You can create email templates for use in Visualforce pages.

EDITIONS

Available in: Salesforce Classic

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Mass email not available in: **Personal**, **Contact Manager**, and **Group** Editions

USER PERMISSIONS

To create or change Visualforce email templates:
- "Customize Application"

To create or change public email template folders:
- "Manage Public Templates"

1. Do one of the following:
    - If you have permission to edit public templates, from Setup, enter *`Email Templates`* in the `Quick Find` box, then select **Email Templates**.
    - If you don't have permission to edit public templates, go to your personal settings. Enter *`Templates`* in the `Quick Find` box, then select **Email Templates** or **My Templates**—whichever one appears.
2. Click **New Template**.
3. Choose `Visualforce` and click **Next**.

    You can't send a mass email using a Visualforce email template.
4. Choose a folder in which to store the template.
5. To make the template available for use, select the `Available For Use` checkbox.
6. Enter a name in `Email Template Name`.
7. If necessary, change the `Template Unique Name`. This unique name refers to the component when you use the Force.com API. In managed packages, this unique name prevents naming conflicts in package installations. This name can contain only underscores and alphanumeric characters, and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. With the `Template Unique Name` field, you can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.
8. If desired, choose a different character set from the `Encoding` drop-down list.
9. Enter a description for the template. Both template name and description are for your internal use only.
10. Enter a subject line for your template in `Email Subject`.
11. In the `Recipient Type` drop-down list, select the type of recipient to receive email created from the template.
12. If desired, in the `Related To Type` drop-down list, select the object from which the template retrieves merge field data.
13. Click **Save**.
14. On the Viewing Email Templates page, click **Edit Template**.
15. Enter markup text for your Visualforce email template.

    Note: If you are including an image, we recommend uploading it to the Documents tab to reference the copy of the image on our server. For example:

    ```
    <apex:image id="Logo" value="https://na7.salesforce.com/servlet/servlet.ImageServer?
    id=015D0000000Dpwc&oid=00DD0000000FHaG&lastMod=127057656800"
    height="64" width="64"/>
    ```
16. To specify the version of Visualforce and the API used with this email template, click **Version Settings**. If you've installed managed packages from the AppExchange, you can also specify which version of each managed package to use with this email template. Generally, use the default value for all versions, to associate the email template with the most recent version of Visualforce, the API, and each managed package. To maintain specific behavior, you can specify an older version of Visualforce and the API. To access components or functionality that differ from the most recent package version, you can specify an older version of a managed package.

17. To view the details of the template, click **Save**. To continue editing your template, click **Quick Save**. Your Visualforce markup must be valid before you can save your template.

    Note: The maximum size of a Visualforce email template is 1 MB.

    You can't send a mass email using a Visualforce email template. The `{!Receiving_User.field_name}` and `{!Sending_User.field_name}` merge fields work only for mass email and are unavailable in Visualforce email templates.

Tip:

- View a sample of the template populated with data from records you choose and send a test email by clicking **Send Test and Verify Merge Fields**. If the email template includes encrypted data, remember that the data is displayed as encrypted within the generated email and in the Visualforce template page. For security reasons, it isn't displayed in plain text.
- To translate Visualforce email templates based on recipients' or related objects' languages, use the `<messaging:emailTemplate>` tag's `language` attribute (valid values: Salesforce supported language keys, for example, "en-US"). The language attribute accepts merge fields from the email template's `recipientType` and `relatedToType` attributes. You create custom language fields for use in the merge fields. The Translation Workbench is required to translate email templates.

SEE ALSO:

Create HTML Email Templates

Create Custom HTML Email Templates

Create Custom HTML Email Templates

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions

Mass email not available in: **Personal**, **Contact Manager**, and **Group** Editions

HTML and Visualforce email templates not available in: **Personal** Edition

USER PERMISSIONS

To create or change custom HTML email templates:
- "Edit HTML Templates"

To create or change public email template folders:
- "Manage Public Templates"

You can create custom HTML email templates without using letterhead. If you don't know HTML, you can paste HTML code into your template.

1. Do one of the following:
    - If you have permission to edit public templates, from Setup, enter `Email Templates` in the `Quick Find` box, then select **Email Templates**.
    - If you don't have permission to edit public templates, go to your personal settings. Enter `Templates` in the `Quick Find` box, then select **Email Templates** or **My Templates**—whichever one appears.
2. Click **New Template**.
3. Choose `Custom (without using Letterhead)` and click **Next**.
4. Choose a folder in which to store the template.
5. To make the template available for use, select the `Available For Use` checkbox.
6. Enter a name in `Email Template Name`.
7. If necessary, change the `Template Unique Name`. This unique name refers to the component when you use the Force.com API. In managed packages, this unique name prevents naming conflicts in package installations. This name can contain only underscores and alphanumeric characters, and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. With the `Template Unique Name` field, you can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.

8. If desired, choose a different character set from the `Encoding` drop-down list.
9. Enter a `Description` for the template. Both template name and the description are for your internal use only. The description is used as the title of any email activities you log when sending mass email.
10. Click **Next**.
11. Enter a `Subject` for the message.
12. Enter the HTML source text for the message. Include all the HTML tags.

    Note: If you are including an image, we recommend uploading it to the Documents tab. Then you can reference the copy of the image on our server. For example:

    ```
    <img src="https://na2.salesforce.com/servlet/servlet.ImageServer?
    id=015D0000000Dpwc&oid=00DD0000000FHaG&lastMod=1270576568000" alt="Company Logo"
    height="64" width="64"/>
    ```

13. If desired, enter merge fields in the template subject and body. When you send an email, these fields are replaced with information from your lead, contact, account, opportunity, case, or solution.
14. Click **Next**.
15. If desired, enter the text-only version of your email or click **Copy text from HTML version** to paste the text from your HTML version without the HTML tags automatically. The text-only version is available to recipients who can't view HTML emails.

    Warning: We recommend that you leave the text-only version blank. If you leave it blank, Salesforce automatically creates the text-only content based on the current HTML version. If you enter content manually, subsequent edits to the HTML version aren't reflected in the text-only version.

16. Click **Save**.

Tip: View a sample of the template populated with data from records you choose and send a test email by clicking **Send Test and Verify Merge Fields**.

Note: You can't modify the content of a custom HTML template when you select it for use in an email.

SEE ALSO:

Create HTML Email Templates

Create Visualforce Email Templates

Create HTML Email Templates

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions

Mass email not available in: **Personal**, **Contact Manager**, and **Group** Editions

HTML and Visualforce email templates not available in: **Personal** Edition

USER PERMISSIONS

To create or change HTML email templates:
- "Edit HTML Templates"

To create or change public email template folders:
- "Manage Public Templates"

You can create HTML email templates using letterhead. You can't change the letterhead or the layout in an existing template. To create an HTML email template, you must have at least one active letterhead.

To create an HTML email template:

1. Do one of the following:
   - If you have permission to edit public templates, from Setup, enter *`Email Templates`* in the `Quick Find` box, then select **Email Templates**.
   - If you don't have permission to edit public templates, go to your personal settings. Enter *`Templates`* in the `Quick Find` box, then select **Email Templates** or **My Templates**—whichever one appears.
2. Click **New Template**.
3. Choose `HTML (using Letterhead)` and click **Next**.
4. Choose a folder in which to store the template.
5. To make the template available for use, select the `Available For Use` checkbox.
6. Enter an `Email Template Name`.
7. If necessary, change the `Template Unique Name`. This unique name refers to the component when you use the Force.com API. In managed packages, this unique name prevents naming conflicts in package installations. This name can contain only underscores and alphanumeric characters, and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. With the `Template Unique Name` field, you can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.
8. Select a `Letterhead`. The letterhead determines the logo, page color, and text settings of your email. In an existing template, you can't change this field. To use a different letterhead after you've created a template, create another template.
9. Select the `Email Layout`. The email layout determines the columns and page layout of the message text. To see samples, click **View Email Layout Options**. In an existing template, you can't change this field. To use a different email layout after you've created a template, create another template.
10. If desired, choose a different character set from the `Encoding` drop-down list.
11. Enter a `Description` of the template. Both template name and description are for your internal use only. The description is used as the title of any email activities you log when sending mass email.
12. Click **Next**.
13. Enter a subject for the email you send.
14. Enter the text of the message by clicking any section and entering text. To prevent anyone using the template from editing a section, click the padlock icon.
15. Change the style of your text by selecting the text and using the format toolbar.
16. If desired, enter merge fields in the template subject and body. When you send an email, these fields are replaced with information from your lead, contact, account, opportunity, case, or solution.
17. Click **Next**.
18. If desired, enter the text-only version of your email or click **Copy text from HTML version** to paste the text from your HTML version without the HTML tags automatically. The text-only version is available to recipients who can't view HTML emails.

Warning: We recommend that you leave the text-only version blank. If you leave it blank, Salesforce automatically creates the text-only content based on the current HTML version. If you enter content manually, subsequent edits to the HTML version aren't reflected in the text-only version.

19. Click **Save**.

Tip: View a sample of the template populated with data from records you choose and send a test email by clicking **Send Test and Verify Merge Fields**.

SEE ALSO:

Create Custom HTML Email Templates

Create Visualforce Email Templates

Considerations for Using Merge Fields in Email Templates

A merge field is a field you can put in an email, an email template, a mail merge template, a custom link, or a formula to incorporate values from a record. You can use merge fields in the subject and body of custom HTML templates. When using merge fields, it's a good idea to understand how they work and what to expect in your merged emails.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions

Mass email not available in: **Personal**, **Contact Manager**, and **Group** Editions

HTML and Visualforce email templates not available in: **Personal** Edition

Guidelines for Syntax and Formatting

The syntax consists of an open curly brace and exclamation point, followed by the object name, a period, the field name, and a closing curly brace. For example, if you want to include the account number of your recipient, you could enter `ID: {!Account.AccountNumber}`, and your recipient's email displays `ID: 001234567890123`.

A merge field's syntax can vary depending on where you're using the field. To make sure you're using the correct syntax, select merge fields from the drop-down list in the editor where you're using the merge field. Most merge fields for email templates correspond directly with email template fields.

Important:

- If two or more custom objects have matching names or labels, only one of the objects appears when you select from available merge fields. Make sure that all custom objects have unique names and labels so that you can select merge fields from any of the objects.

Guidelines for Using Merge Fields

General

- Don't use a hyperlink formula field in the subject of an email template or in the body of a text email template.
- In email templates, you can add substitute text to any merge field. Substitute text appears in a sent email if the merge record does not contain data for that field. To add substitute text, place a comma after the field name and enter the text before the closing bracket, for example: `Dear {!Contact.FirstName, Valued Customer}`. When you save the template, the merge field appears in the template as `Dear {!BLANKVALUE(Contact.FirstName, "Valued Customer")}`. In this example, if there is no information in the `First Name` field of the contact record, the email you create with your template begins with "Dear Valued Customer".
- The `{!Receiving_User.field_name}` and `{!Sending_User.field_name}` merge fields work only for mass email and are unavailable in Visualforce email templates.

- User fields are also known as `Sending User` fields for administrators and users with the "Manage Users" permission. Use them in email templates when referencing the person sending the email.
- Administrators and users with the "Manage Users" permission can use Receiving User merge fields for email templates to reference the recipient of the email.
- The `Created Date` and `Last Modified Date` fields display only the date, not the date and time.
- If your template contains a merge field for which there is no data in a particular record, that field does not appear in the email you send. To find blank fields, modify your recipient list view to search for the merge fields you are using in your template, and enter the criterion "<field> equals," leaving the third field blank. Edit those records that have blank fields before you send your emails.

Accounts

When account merge fields are included in an email template and this template is selected after a contact is added to the email `To` field, the account merge fields are populated from the contact's account, not the case's account.

Approvals

- Approval process merge fields can be used in email templates, but not mail merge templates.
- Except for `{!ApprovalRequest.Comments}`, approval merge fields named `{!ApprovalRequest.field_name}` in email templates return values only in approval assignment emails and email alerts for approval processes. When used in other emails—including email alerts for workflow rules—the approval merge fields return `null`.
- The `{!ApprovalRequest.Comments}` merge field returns only the most recently entered comment in emails for an approval step that requires unanimous approval from multiple approvers.
- When creating an approval process, the current user or creator of the process can specify a submitter. If you use custom email templates with merge fields, you need to account for the possibility that the current user and the submitter aren't the same user. For example, you may need to change current user references of `{!User.<field_name>}` to a specified submitter reference `{!ApprovalRequestingUser.<field_name>}`.

Campaigns

- Campaign and campaign member merge fields can be used in email templates, but not mail merge templates.
- Campaign member merge fields cannot be used with other types of merge fields in the same email template. For example, if you create an email template using a campaign member merge field and you want to include the title of the recipient, use `{!CampaignMember.Title}` instead of `{!Lead.Title}` or `{!Contact.Title}`.

Cases

If you have enabled Email-to-Case or On-Demand Email-to-Case, you can create email templates that support agents can use to respond to case emails. These templates can include merge fields that display information from the original email in the response.

Connection Finder

Custom email templates must contain the survey URL. `{!Contact.PartnerSurveyURL}` is available as a contact merge field when creating templates.

Contacts

- In Salesforce Classic, templates with Contact merge fields can be used to generate mail merge documents for leads. Likewise, templates with Lead fields can be used to generate mail merge documents for contacts.
- You can use custom Contact or Lead fields for merging in Salesforce Classic and Lightning Experience, but only for documents for the object the custom fields come from. For example, a custom Lead field can only be used for templates for leads.

Opportunities

Merge fields for products on opportunities are only available to organizations that have enabled products and can only be used in mail merge templates, but not email templates.

Workflow

To use merge fields from user records in email templates, select from the following merge field types:

- User Fields—Use these merge fields to represent the sending user. Merge fields named `{!User.field_name}` return values from the user record of the person who created or updated the record that triggered the workflow rule.
- Workflow Target User Fields—Use these merge fields only in email templates for workflow rules on the User object. Merge fields named `{!Target_User.field_name}` return values from the user record that was created or updated to trigger the workflow rule.

This release contains a beta version of workflow on the User object that is production quality but has known limitations. To provide feedback and suggestions, go to IdeaExchange.

Merge Fields for Visualforce Email Templates

A merge field is a field you can put in an email template, mail merge template, custom link, or formula to incorporate values from a record.

EDITIONS

Available in: Salesforce Classic

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Mass email not available in: **Personal**, **Contact Manager**, and **Group** Editions

Syntax and Formatting

Merge fields for Visualforce email templates use the same expression language as formulas:

```
{!Object_Name.Field_Name}
```

For example, you can start your email template with `Hello, {!Contact.FirstName}`. When you send the template, each recipient will see their first name in place of the merge field. If your recipient’s first name is John, he will see `Hello, John!` when he opens the email.

Tips

- You can’t send a mass email using a Visualforce email template. `{!Receiving_User.field_name}` and `{!Sending_User.field_name}` are used for mass email and aren’t available for Visualforce email templates.
- To translate Visualforce email templates based on recipients’ or related objects’ languages, use the `<messaging:emailTemplate>` tag’s language attribute. Valid values are Salesforce-supported language keys, such as “en-us” for English (US). The language attribute accepts merge fields from the email template’s `recipientType` and `relatedToType` attributes. You create custom language fields for use in the merge fields. The Translation Workbench is required to translate email templates.

SEE ALSO:

Create Visualforce Email Templates

Considerations for Using Merge Fields in Mail Merge Templates

A merge field is a field you can put in an email, an email template, a mail merge template, a custom link, or a formula to incorporate values from a record. When using merge fields, it's a good idea to understand how they work and what to expect in your merged documents.

EDITIONS

This feature is available in both Salesforce Classic

Available in all editions

Guidelines for Syntax and Formatting

Mail merge templates are created by uploading documents to Salesforce from your desktop. The syntax for these merge fields is *`OBJECT_FIELD_NAME`* or *`FIELD_NAME`*. Merge fields for mail merge templates must:

- Be unique
- Contain only letters, numbers, and the underscore (_) character
- Not exceed 40 characters

For example: `AccountNumber`. To make sure that you're using the correct syntax, use Connect for Office to insert merge fields into your mail merge template.

Merge Field Compatibility

- In Salesforce Classic, templates with Contact merge fields can be used to generate mail merge documents for leads. Likewise, templates with Lead fields can be used to generate mail merge documents for contacts.
- You can use custom Contact or Lead fields for merging in Salesforce Classic and Lightning Experience, but only for documents for the object the custom fields come from. For example, a custom Lead field can only be used for templates for leads.
- In Salesforce Classic, for Opportunity mail merges, you can use Contact merge fields to merge additional information about a related contact.
- Salesforce Classic, merge fields for products on opportunities are only available to organizations that have enabled products. Merge fields for products on opportunities are not available in Lightning Experience.
- n Salesforce Classic, Approval Process merge fields can be used in email templates, but not mail merge templates. Merge fields for Approval Process are not available in Lightning Experience.
- Campaign and campaign member merge fields cannot be used in mail merge templates.

Managing Version Settings for Visualforce Email Templates

To aid backwards-compatibility, each Visualforce email template is saved with version settings for the specified version of Visualforce and the API. If the Visualforce email template references installed managed packages, the version settings for each managed package referenced by the Visualforce component are saved too. This ensures that as Visualforce, the API and the components in managed packages evolve in subsequent versions, a Visualforce email template is still bound to versions with specific, known behavior.

A package version is a number that identifies the set of components uploaded in a package. The version number has the format *`majorNumber.minorNumber.patchNumber`* (for example, 2.1.3). The major and minor numbers increase to a chosen value during every major release. The *`patchNumber`* is generated and updated only for a patch release. Publishers can use package versions to evolve the components in their managed packages gracefully by releasing subsequent package versions without breaking existing customer integrations using the package.

EDITIONS

Available in: Salesforce Classic

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Mass email not available in: **Personal**, **Contact Manager**, and **Group** Editions

USER PERMISSIONS

To set version settings for Visualforce email templates:

- "Customize Application"

To set the Salesforce API and Visualforce version for an existing Visualforce email template:

1. Do one of the following:
    - If you have permission to edit public templates, from Setup, enter *`Email Templates`* in the `Quick Find` box, then select **Email Templates**.
    - If you don't have permission to edit public templates, go to your personal settings. Enter *`Templates`* in the `Quick Find` box, then select **Email Templates** or **My Templates**—whichever one appears.
2. Click the `Email Template Name` for the Visualforce email template.
3. Click **Edit Template** and then click **Version Settings**.
4. Select the `Version` of the Salesforce API. This is also the version of Visualforce used with this template.
5. Click **Save**.

To configure the package version settings for a Visualforce email template:

1. Do one of the following:
    - If you have permission to edit public templates, from Setup, enter *`Email Templates`* in the `Quick Find` box, then select **Email Templates**.
    - If you don't have permission to edit public templates, go to your personal settings. Enter *`Templates`* in the `Quick Find` box, then select **Email Templates** or **My Templates**—whichever one appears.
2. Click the `Email Template Name` for the Visualforce email template.
3. Click **Edit Template** and then click **Version Settings**.
4. Select a `Version` for each managed package referenced by the Visualforce email template. This version of the managed package will continue to be used by the Visualforce email template if later versions of the managed package are installed, unless you manually update the version setting. To add an installed managed package to the settings list, select a package from the list of available packages. The list is only displayed if you have an installed managed package that is not already associated with the Visualforce email template.
5. Click **Save**.

Note the following when working with package version settings:

- If you save a Visualforce email template that references a managed package without specifying a version of the managed package, the Visualforce email template is associated with the latest installed version of the managed package by default.

- You cannot **Remove** a Visualforce email template's version setting for a managed package if the package is referenced by the Visualforce email template.

SEE ALSO:

Create Visualforce Email Templates
Create HTML Email Templates
Create Custom HTML Email Templates

Managing Cloud-Based Email Integration

Administering Salesforce App for Outlook

Salesforce App for Outlook

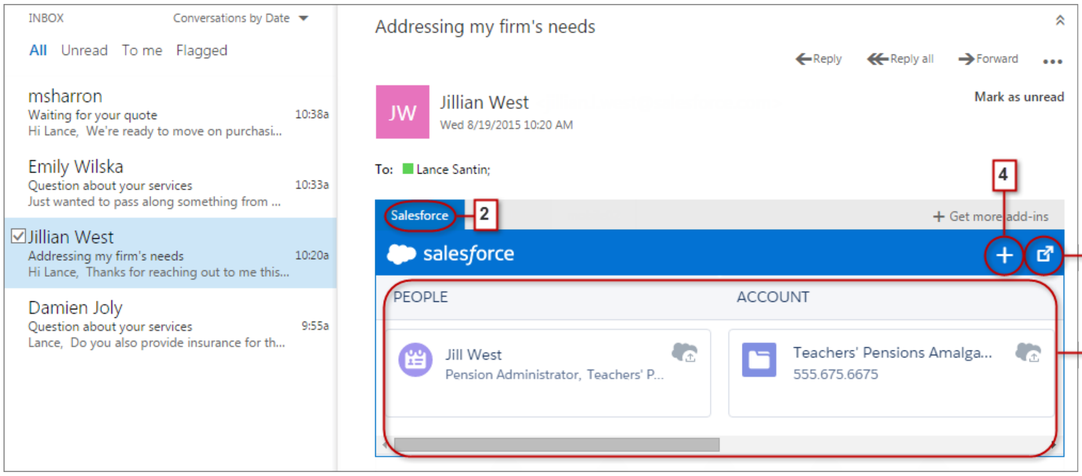
Get your sales teams to stay on top of important sales opportunities. Using Microsoft® Outlook® Web App (OWA), Outlook 2016, or Outlook 2013, along with Microsoft Office 365™, sales teams can manage their sales more efficiently. Your sales reps can add email and attachments to Salesforce records. Also, they can create Salesforce records using global actions—directly in their email applications.

First, you enable Salesforce App for Outlook, and then your sales team members complete their short setup procedures. After that, teammates select an email in their email applications (1) and then select `Salesforce` (2). That's when they see related contacts, leads, and users. They can also see related accounts, opportunities, and cases (3).

EDITIONS

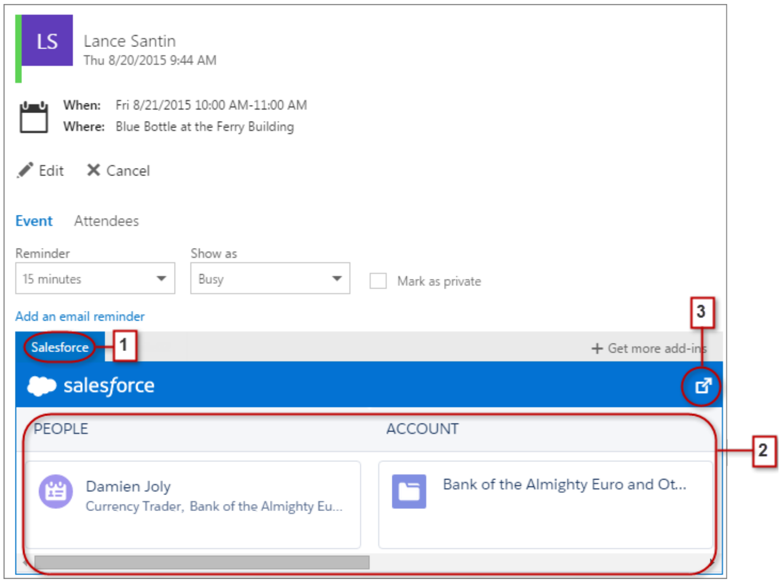
Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions


INBOX
Conversations by Date
All
Unread
To me
Flagged
msharron
Waiting for your quote
Hi Lance, We're ready to move on purchasi...
10:38a
Emily Wilska
Question about your services
Just wanted to pass along something from ...
10:33a
☑Jillian West
Addressing my firm's needs
Hi Lance, Thanks for reaching out to me this...
10:20a
Damien Joly
Question about your services
Lance, Do you also provide insurance for th...
9:55a
Addressing my firm's needs
Reply
Reply all
Forward
JW
Jillian West
Wed 8/19/2015 10:20 AM
Mark as unread
To: Lance Santin;
Salesforce
2
+ Get more add-ins
4
salesforce
5
PEOPLE
ACCOUNT
Jill West
Pension Administrator, Teachers' P...
Teachers' Pensions Amalga...
555.675.6675
3

Sales reps can select the record to see more details about it in their email application. Or they can get complete details about the record or the email added to it directly in Salesforce (4).

As an attendee to events in Microsoft calendars, your reps see relevant Salesforce records. First, your reps open an event in their Microsoft email application. Then, they select Salesforce (1).



Relevant Salesforce records appear (2). And like when reps work with emails, your reps can select a record to see more details in their email application. Or, they can get complete details about the record directly in Salesforce (3).

Event organizers can see a different view of relevant Salesforce records. After organizers open an event, they select **Add-ins** > **Salesforce**. Relevant records appear in the right pane.

Set Up Sales Teams to Experience Salesforce in Microsoft® Email Applications

Help your sales teams see and create Salesforce records with global actions directly in Outlook Web App (OWA), Outlook 2016, and Outlook 2013.

1. From Salesforce Setup, enter `App for Outlook Settings` in the `Quick Find` box, then select **App for Outlook Settings**.

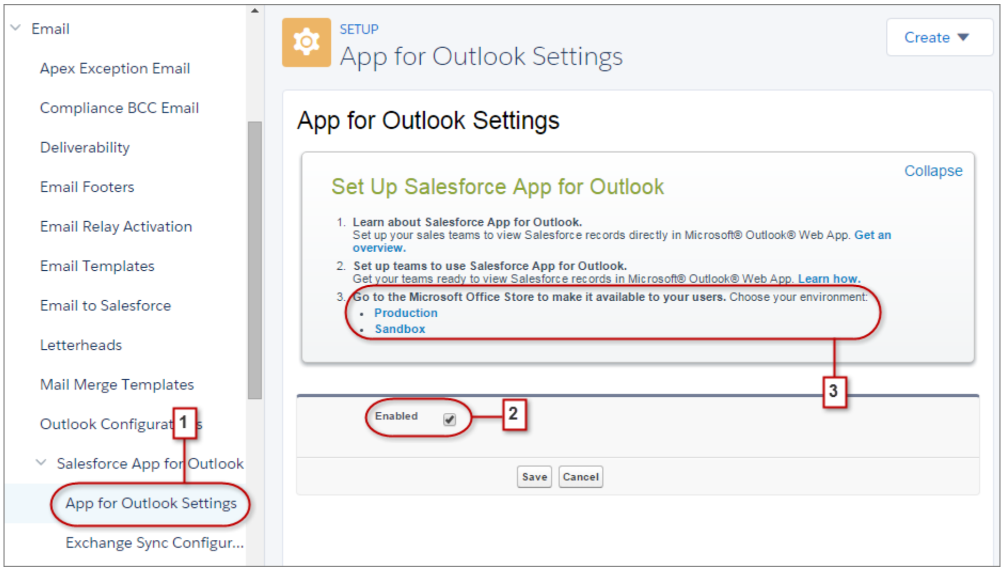
EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Salesforce App for Outlook
- "Customize Application"



App for Outlook Settings

Set Up Salesforce App for Outlook

1. **Learn about Salesforce App for Outlook.** Set up your sales teams to view Salesforce records directly in Microsoft® Outlook® Web App. Get an overview.
2. **Set up teams to use Salesforce App for Outlook.** Get your teams ready to view Salesforce records in Microsoft® Outlook® Web App. Learn how.
3. **Go to the Microsoft Office Store to make it available to your users.** Choose your environment:
   - Production
   - Sandbox

Enabled ☑

2. Enable the app. If you're using My Domain, enter your custom domain in **Exchange Metadata URL**. Save your changes.

After the whitelist and mapping sections appear, there's no need for you to change them.

3. Choose the environment in which you're setting up Salesforce App for Outlook.

Tip: Help your sales teams help themselves! From the Microsoft Office Store, make Salesforce App for Outlook available for your sales teams to install. That way, you spend less time installing the app for fewer teammates.

Administering Exchange Sync (Beta)

Exchange Sync (Beta) Syncs your Microsoft® Items

Help users keep their contacts and events in sync between your Microsoft® Exchange server and Salesforce without installing and maintaining software.

Note: Exchange Sync is currently available as a beta feature, which means it's a high-quality feature with known limitations. Check out our Exchange Sync Implementation Guide to set up the feature at your company.

When you set up your users' contacts and events to sync between your company's email system and Salesforce, you help your users increase their productivity, because there's no need for them to duplicate their work between the two systems.

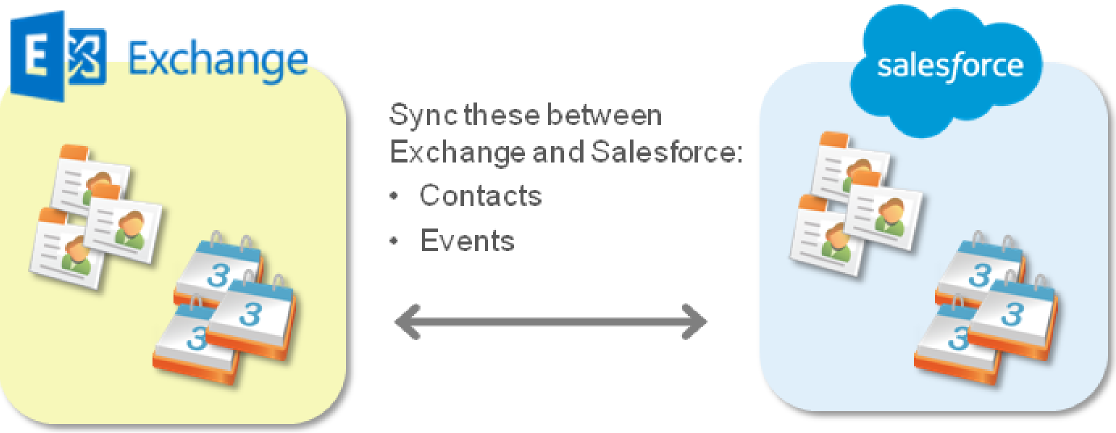
You decide whether your users sync both contacts and events by defining sync settings in Salesforce. You can also determine whether users' records sync between your Exchange servers and Salesforce in both directions, or just one.

Your users can sync records they create and maintain either at their desks or on their mobile devices.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



At this time, Exchange Sync doesn't:

- Sync recurring events
- Sync invitees included in events
- Let users delete records from both systems in one action

However, your users can manage these actions as they always have—by manually updating recurring events, adding event invitees, and deleting records in both systems.

Exchange Sync System Requirements

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Before setting up your users to sync contacts and events with Exchange Sync, make sure your Microsoft® Exchange-based server meets these system requirements.

Your company must be running	With these settings enabled
Exchange Server 2010 - Service Pack 3	• Exchange Web Services (EWS) on an SSL connection • Exchange Autodiscover Service • Basic authentication on both your Exchange server and your Autodiscover service
Exchange Server 2013 - Service Pack 1	
Exchange Online, Office 365® - Enterprise Editions	

See the Big Picture for Setting Up Exchange Sync

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To prepare your Exchange server to communicate with Salesforce:

- Administrative access to your company's Microsoft® Exchange server

Set up Exchange Sync at your organization so your users can sync contacts and events between your company's Microsoft® Exchange server and Salesforce. You'll complete several steps to prepare the systems to communicate, both on your Exchange server and in Salesforce.

Complete these steps to set up Exchange Sync for your organization.

1. Prepare your Exchange server for Exchange Sync by enabling a few settings.
2. Set up an Exchange service account so your server can communicate with Exchange Sync.
3. Run the Microsoft® Remote Connectivity Analyzer using Exchange Sync parameters to test that you set up your Exchange server correctly.
4. Set up Salesforce to communicate with Exchange by enabling Exchange Sync and providing your service account credentials in Salesforce.
5. Prepare your users to manage calendar events they don't want to sync.
6. Define your users' sync settings in Exchange Sync configurations.
7. Prepare your users to manage email contacts they want to sync.

SEE ALSO:

Exchange Sync (Beta) Syncs your Microsoft® Items

https://success.salesforce.com/_ui/core/chatter/groups/GroupProfilePage?g=0F9300000009M90CAE

Prepare Your Microsoft® Exchange Server for Exchange Sync

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The first step in setting up Exchange Sync is to enable several settings on your Exchange server, including Exchange Web Services, Exchange Autodiscover Service, and Basic authentication.

These instructions vary depending on the version of Microsoft® Exchange your company uses. For more support, visit Microsoft's support website, search for the keywords mentioned here, and follow the instructions intended for your Exchange version.

Complete the following steps on your Exchange server.

1. Enable Exchange Web Services (EWS) on an SSL connection.
   - Make sure your Exchange server has a signed certificate from one of the Salesforce-approved Certificate Authorities.
   - If your organization has configured a firewall, allow an inbound connection to your Exchange client access server on ports 80 and 443.
2. Enable Exchange Autodiscover Service.
3. Enable Basic authentication on both your Exchange server and your Autodiscover service. If you need to run additional authentication methods (such as Microsoft NTLM), there is no need to disable those methods; you can run Exchange Sync without conflict.

Now you're ready to set up an Exchange service account.

Set up a Microsoft® Exchange Service Account to Communicate with Exchange Sync

After you've enabled Exchange Web Services and Exchange Autodiscover Service on your Exchange server, you'll create a service account with impersonation rights for the mailbox of each Exchange Sync user.

Before setting up an Exchange Service account, make sure you've enabled the appropriate Exchange server settings to set up Exchange Sync.

To set up an Exchange service account, you'll complete these steps on your Exchange server.

Watch a Demo:

- Salesforce Exchange Sync Setup in Office 365 via Point and Click
- Salesforce Exchange Sync Setup in Exchange via the Command Line

Note: For more support, visit Microsoft®'s support website, search for the keywords mentioned here, and follow the instructions intended for your Exchange version.

1. Create an Exchange user with a mailbox that will act as the service account. You'll use this email address for this mailbox to configure Exchange impersonation for the service account.
2. Using Exchange Management Shell, enter the commands that enable service account impersonation for your version of Exchange. If you receive a pipeline error message, wait a few minutes and re-enter the command to let your server process the requests.
   - If you're using Exchange 2010 or 2013:

   a. Enable the Active Directory extended permission for `ms-Exch-EPI-Impersonation` on all Client Access servers.

   ```
   Get-ExchangeServer | where {$_IsClientAccessServer -eq $TRUE} | ForEach-Object
   {Add-ADPermission -Identity $_.distinguishedname -User (Get-User -Identity
   <EnterExchangeSyncServiceAccountEmailAddress> | select-object).identity
   -extendedRight ms-Exch-EPI-Impersonation}
   ```

   b. Enable the Active Directory extended rights for `ms-Exch-EPI-May-Impersonate` to let your service account impersonate all accounts on your Exchange server. You'll set a filter later that lets you limit the users the service account syncs with Salesforce.

   ```
   Get-MailboxDatabase | ForEach-Object {Add-ADPermission -Identity $_.distinguishedname
    -User <EnterExchangeSyncServiceAccountAddress> -ExtendedRights
   ms-Exch-EPI-May-Impersonate}
   ```

   - If you're using Exchange Online offered by Microsoft Office 365™:

   a. Enable customization on your Exchange server.

   ```
   Enable-OrganizationCustomization
   ```

3. Using Exchange Management Shell, enter these commands to configure your service account to impersonate the group of users who'll sync with Exchange Sync.

   a. Create a management scope to define a filter that groups together the Exchange users who'll sync with Exchange Sync. For example, if you want only your sales representatives to sync, and their Exchange mailboxes all have the same value *`Sales`* for the filterable property *`Department`*, you'd enter *`Department -eq 'Sales'`* in place of *`<ChooseRecipientFilter>`*.

   ```
   New-ManagementScope -Name:<ChooseExchangeSyncScopeName>
   -RecipientRestrictionFilter:{<ChooseRecipientFilter>}
   ```

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up a service account to communicate with Exchange Sync:

- Administrative access to your company's Exchange server

b. Create a management role assignment that restricts the service account to impersonate only the users you defined in the management scope.

```
New-ManagementRoleAssignment -Name:<ChooseExchangeSyncRoleAssignmentName>
-Role:ApplicationImpersonation -User:<EnterExchangeSyncServiceAccountAddress>
-CustomRecipientWriteScope:<EnterExchangeSyncScopeName>
```

After you've set up your service account, run the Microsoft® Remote Connectivity Analyzer using Exchange Sync parameters to make sure you've set up your server for Exchange Sync. We recommend that you wait a few minutes after completing these tasks to let your Exchange server process the changes you've made. Otherwise, the Remote Connectivity Analyzer may show a failed test summary, even though you've configured setup correctly.

Run the Microsoft® Remote Connectivity Analyzer Using Exchange Sync Parameters

If your Exchange Sync users can't sync their items, make sure your Exchange administrator has set up your server correctly by running the Remote Connectivity Analyzer—Microsoft®'s free, web-based tool—to test your connection and troubleshoot setup issues.

Before you run the Remote Connectivity Analyzer, make sure that you've enabled the appropriate Exchange server settings and then set up an Exchange service account. We recommend that you wait a few minutes after completing those tasks to let your Exchange server process the changes you've made. Otherwise, the Remote Connectivity Analyzer may show a failed test summary, even though you've configured setup correctly.

1. Visit Microsoft's website and search for the Remote Connectivity Analyzer.
2. On the `Exchange Server`tab, select the**Service Account Access (Developers)**.
3. Click **Next**.
4. Complete the test fields:

For this Test Field	Type this parameter
`Target mailbox email address`	The Exchange email address of an Exchange Sync user for whom you'd like to test sync connectivity
`Service Account User Name (Domain\User Name or UPN)`	The service account domain\user name or UPN you've set up for Exchange Sync
`Service Account Password`	The service account password you've set up for Exchange Sync

5. Select `Use Autodiscover to detect server settings`.
6. Select `Test predefined folder`.
7. Choose `Contacts` if you'd like to test sync connectivity for this user's contacts, or `Calendar` for this user's events.
8. Check `Use Exchange Impersonation`.
9. In the `Impersonated User` field, type the same Exchange email address you specified for `Target mailbox email address`.
10. For `Impersonated user identifier`, select `SMTP Address`.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To get the necessary parameters to run the test:

- Administrative access to your company's Microsoft® Exchange server

11. Check the `I understand that I must use the credentials of a working account...` acknowledgment.
12. Type the analyzer verification code and click **verify**.
13. At the top of the page, click **Perform Test**.
    Running the test usually takes less than 30 seconds. When the test is complete, the analyzer displays a summary evaluating the sync connectivity for the Exchange user you've specified.
14. Take action based on the test results.
    - If the test summary displays "Connectivity Test Successful" or "Connectivity Test Successful with Warnings," it's likely that you've set up your service account correctly, and you're ready to provide your service account credentials to Salesforce.
    - If the test summary displays "Connectivity Test Failed," review the test details to troubleshoot setup issues. You might want to return to instructions on how to set up Exchange Sync correctly.
    - If you still are unable to set up Exchange Sync, or if you complete setup successfully but your users are still unable to sync their records, run the test again, and save the test details as HTML. You can provide these details to Salesforce Customer Support to evaluate your setup if you need to file a case.

Set up Salesforce to Communicate with Microsoft® Exchange

After running the Remote Connectivity Analyzer, you'll log in to Salesforce to enable Exchange Sync and provide the service account credentials you created in Exchange. This task lets Exchange and Salesforce communicate.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Exchange Sync setup in Salesforce:
- "View Setup and Configuration"

1. From Salesforce Setup, enter *`Exchange Sync`* in the `Quick Find` box, then select **Exchange Sync Setup**.
2. Under Enable Exchange Sync, click **Edit**.
3. Check `Enable Exchange Sync` and click **Save**.
4. Type the service account user name you created in Exchange, including your company's domain and top-level domain. For example, if you created the Exchange user *`svcacct`* to act as your user account mailbox, *`yourcompany`* is your company's domain name, and *`.com`* is your company's top-level domain, you would provide your user name in either of these formats:
    - *`svcacct@yourcompany.com`*
    - *`yourcompany.com\svcacct`*

    Depending on how your company has set up your network configuration, you might be required to test both formats to successfully set up Exchange Sync.
5. Enter your service account password.
6. Click **Save**.

Next you'll tell your users it's time to choose which calendar events they want to prevent from syncing.

Tell Users How to Prevent Calendar Events from Syncing to Salesforce

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Tell your Exchange Sync users how to manage which of their Exchange calendar events sync with Salesforce. We recommend users prepare their calendars before you add users to Exchange Sync configurations and begin the sync process, but users can manage which events sync at anytime.

If you set up users to sync events from Salesforce to Exchange only, you can skip this step and begin to define sync settings for your users.

Users might not want to sync some calendar events—like personal events—with Salesforce.

In the next setup step, you define user sync settings in Exchange Sync configurations, which starts syncing your users' items. At that time, if you set up users to sync events from Exchange to Salesforce or to sync both ways, users' events start to sync to Salesforce right away—unless you tell users to manage their events now.

Users can prevent personal events from syncing from Exchange to Salesforce in different ways.

- Users can create a separate calendar in their calendar application to keep track of their personal events. (Exchange Sync is designed to sync only a reps' main Exchange account calendar with Salesforce.)
- In the next setup step, you choose whether you want to sync users' private events. If you opt not to sync users' private events, you can tell users to assign the private option to events in their calendar applications that they'd rather not sync.

If users don't manage their personal events before syncing begins, users can still remove those events from Salesforce by deleting personal events Salesforce manually.

When you're sure that users have managed the personal events that they don't want to sync, you're ready to define sync settings for your users to kick off the sync process.

Define Sync Settings for Exchange Sync Users

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Exchange Sync setup in Salesforce:
- "View Setup and Configuration"

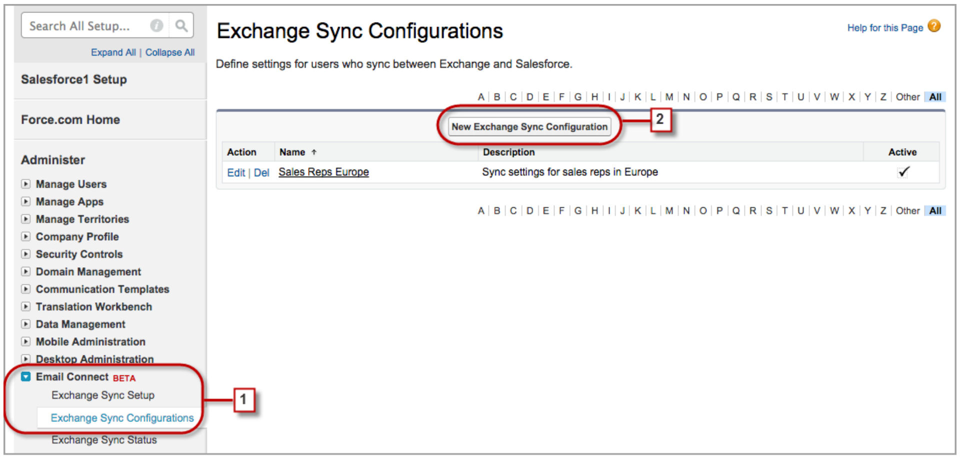
To create, edit, or delete Exchange Sync configurations:
- "Manage Email Client Configurations"

After users prepare their events to sync with Salesforce, you'll define sync settings for groups of users in Exchange Sync configurations. This step kicks off the sync process for your users.

Before defining sync settings in Exchange Sync configurations, make sure that you're Exchange administrator has run the Microsoft® Remote Connectivity Analyzer using the Exchange Sync parameters.

Defining sync settings lets you control which of your users can sync contacts and events. You can also control which direction your users sync, and create filters to limit certain records from syncing.

1. From Salesforce Setup, enter `Exchange Sync Configurations` in the `Quick Find` box, then select **Exchange Sync Configurations**.

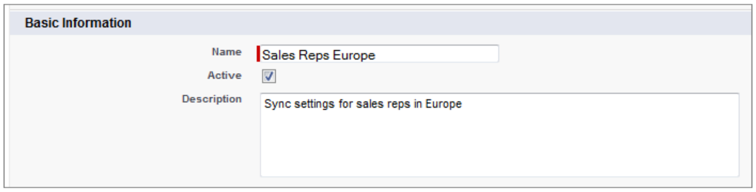


Exchange Sync Configurations

Define settings for users who sync between Exchange and Salesforce.

Action	Name ↑	Description	Active
Edit | Del	Sales Reps Europe	Sync settings for sales reps in Europe	✓

2. Click **New Exchange Configuration**.
3. Enter the name of the configuration. For example, if you're creating a configuration for users in a particular region, enter a unique name for it, and then select `Active`.



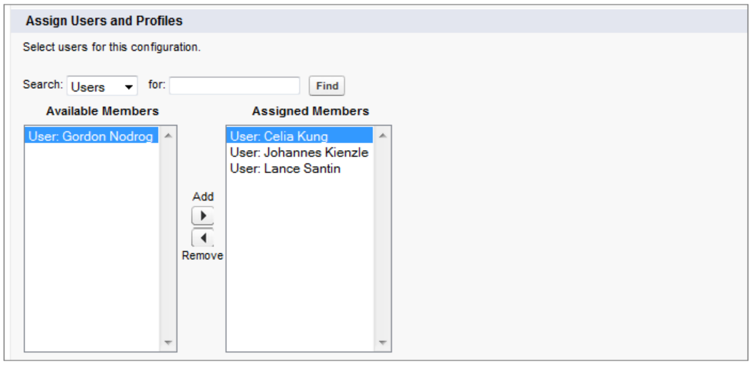
Basic Information

Name: Sales Reps Europe

Active: ☑

Description: Sync settings for sales reps in Europe

4. Assign users and profiles to this configuration.



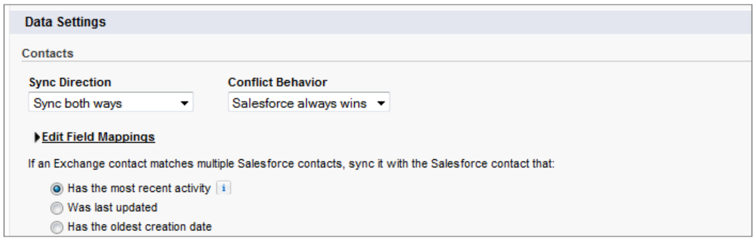
Assign Users and Profiles

Select users for this configuration.

Search: Users for:

Available Members	Assigned Members
User: Gordon Nodrog	User: Celia Kung User: Johannes Kienzle User: Lance Santin

5. Indicate the sync direction for your users' contacts.



Data Settings

Contacts

Sync Direction
Sync both ways

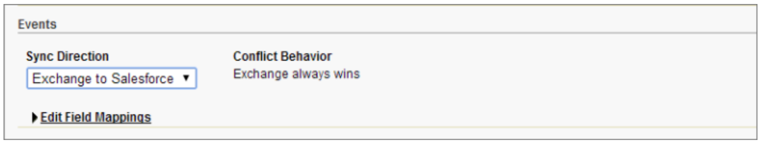
Conflict Behavior
Salesforce always wins

Edit Field Mappings

If an Exchange contact matches multiple Salesforce contacts, sync it with the Salesforce contact that:

● Has the most recent activity
○ Was last updated
○ Has the oldest creation date

6. If you need to change field mappings between Salesforce and Exchange contacts, click **Edit Field Mappings**.
7. Indicate the sync direction for your users' events.



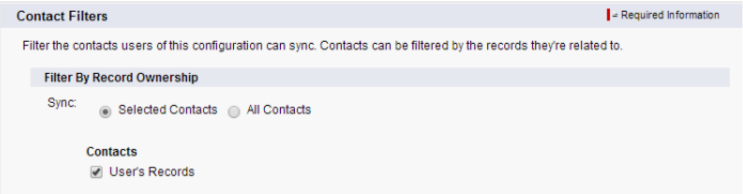
Events

Sync Direction
Exchange to Salesforce

Conflict Behavior
Exchange always wins

Edit Field Mappings

8. If you need to change field mappings between Salesforce and Exchange events, click **Edit Field Mappings**.
9. Select `Sync private events` to sync events your users have marked private either in Salesforce or their calendars.
10. Click **Save**.
11. Set filters to specify the contacts users can sync. You are required to set filters based on your users' record ownership. You'll choose whether you want to:
    - Limit contacts that users sync to only what users own, choose **Selected Contacts**, and then select **User's Records**. Make sure you select both of these settings together, or no contacts sync for users in this configuration.
    - Let users sync all contacts they can see in Salesforce, choose **All Contacts**.



Contact Filters

= Required Information

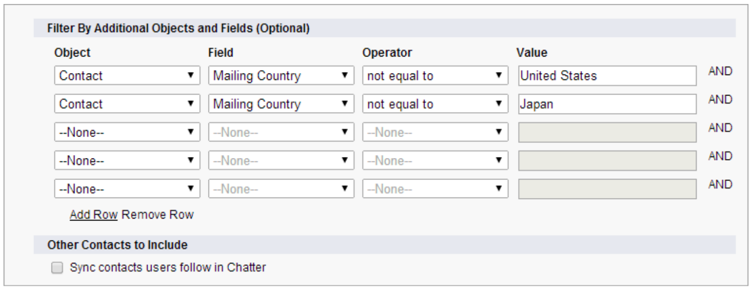
Filter the contacts users of this configuration can sync. Contacts can be filtered by the records they're related to.

Filter By Record Ownership

Sync: ● Selected Contacts ○ All Contacts

Contacts
☑ User's Records

Set additional sync filters, if you wish. For example, to prevent contacts from outside your users' territories from syncing, create sync filters for specific fields on users' contact records. Note that contact filters don't apply to contacts syncing from Exchange to Salesforce.



Filter By Additional Objects and Fields (Optional)

Object	Field	Operator	Value	
Contact	Mailing Country	not equal to	United States	AND
Contact	Mailing Country	not equal to	Japan	AND
--None--	--None--	--None--		AND
--None--	--None--	--None--		AND
--None--	--None--	--None--		AND

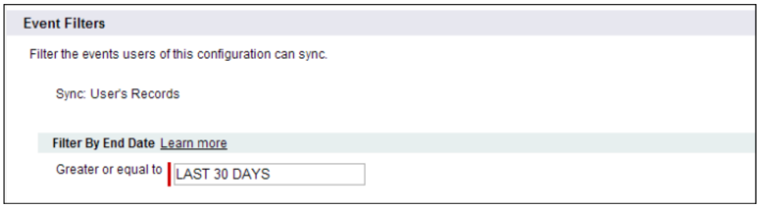
Add Row Remove Row

Other Contacts to Include

☐ Sync contacts users follow in Chatter

12. Specify the specific events users can sync from Salesforce to Exchange. Enter a filter in the `Greater or equal to` field to limit the events users can sync to these time frames.

- `TODAY`—Syncs events that end on or after today. The start time is 12:00 a.m.
- `LAST MONTH`—Syncs events that ended on or after the first day of last month.
- `LAST N DAYS`—Syncs events that ended on or after a specified number of days ago, such as `LAST 30 DAYS`. You can sync events that ended up to 180 days ago.



Event Filters

Filter the events users of this configuration can sync.

Sync: User's Records

Filter By End Date Learn more

Greater or equal to LAST 30 DAYS

13. Click **Save**.

Contact and event syncing has begun for users in this Exchange Sync configuration.

Now it's time to tell users to choose the email contacts they want to sync with Salesforce and move those contacts into the Salesforce_Sync folders in their email applications.

SEE ALSO:

How Exchange Sync Manages Sync Conflicts with Salesforce for Outlook

How Can I Avoid Syncing Data Between My Salesforce Organizations?

Tell Users How to Sync Email Contacts with Salesforce

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Tell your Exchange Sync users that it's time to manage the Exchange email contacts that they want to sync with Salesforce.

If you've set up your users to sync contacts from only Salesforce to Exchange, you can skip this step—your users' contacts and events are already syncing.

After you define users' sync settings by adding them to Exchange Sync configurations and make the configurations active, Exchange Sync creates a folder that's called Salesforce_Sync as a subdirectory under the Contacts directory in each user's email account.

Users who are syncing contacts from Exchange to Salesforce or syncing both ways can choose which email contacts sync to Salesforce by moving those contacts into the Salesforce_Sync folder.

Tell users to move their contacts to the Salesforce_Sync folder now.

How Does My Sales Reps' Stuff Sync with Exchange Sync?

Learn how Exchange Sync handles your reps' contacts and events sync when they're set up to use Exchange Sync.

IN THIS SECTION:

Private Event Sync

Learn how private events sync between Salesforce and your sales reps' calendar applications when you've set up reps to use Exchange Sync.

Private Event Sync

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Learn how private events sync between Salesforce and your sales reps' calendar applications when you've set up reps to use Exchange Sync.

Reps can prevent colleagues from viewing their events in Salesforce and in their calendar applications by marking events as private.

Exchange Sync doesn't sync your reps' private events between systems unless you enable `Sync Private Events` in a rep's Exchange Sync configuration.

After enabling, new and updated private events sync during Exchange Sync's next sync cycle (usually sync cycles occur every few minutes). Private events sync according to the direction and filters you've determined in the rep's configuration.

When private events start syncing, certain private event details are visible to reps' colleagues depending on which system events are viewed in, and how reps have set their calendar sharing settings in Salesforce.

In Salesforce, private event start and end times are visible to colleagues, but event details are hidden. All private event details are visible to Salesforce administrators who can view, edit, and report on events. Reps can choose to share more private event details with their colleagues by changing their calendar sharing level in their `Personal Settings`.

In your calendar application, private event details are shared with colleagues and supervisors as they always have been. Refer to that calendar application documentation for more information.

If you decide to disable Private Event Sync, your reps' private events don't sync during the next sync cycle, and do not sync again. A version of each private event that was previously syncing remains in both Salesforce and the rep's calendar until the rep deletes one or both of them.

Important: Salesforce doesn't communicate to reps how their private events are set up to sync, nor does it communicate that you've changed the setting. It's important that you communicate which experience reps can expect so they can prepare their calendars accordingly. This practice can help keep reps comfortable with syncing their private events. Not to mention guarantee that you keep Great Aunt Alberta's 95th birthday party out of your Salesforce org.

Manage Exchange Sync Users

Assign Users to Exchange Sync Configurations

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view configurations
- "View Setup and Configuration"

To create, edit, or delete configurations:
- "Manage Email Client Configurations"

To get your Exchange Sync users' contacts and events to sync, you'll have to add them to an Exchange Sync Configuration. You can do this in Salesforce by adding individual users, or multiple users with user profiles.

Before you assign a user to an Exchange Sync configuration, consider how that user's records sync if they're already mentioned in another configuration:

- If you assign an individual user to two Exchange Sync configurations, the user is removed from the first configuration automatically and assigned to the new one.
- If you assign a user to two Exchange Sync configurations as both an individual user and as part of a profile, the user is not removed from either configuration, but the user's records will sync according to the configuration that lists the user individually.
- If you assign a user to one Exchange Sync configuration and one configuration, the user is not removed from either configuration, but the user's records will sync according to the Exchange Sync configuration.

Users observe the assignments you've created, added, or removed the next time Exchange Sync runs a sync cycle.

To assign a user to an Exchange Sync configuration,

1. From Setup, enter *`Exchange Sync Configurations`* in the `Quick Find` box, then select **Exchange Sync Configurations**.
2. If you're modifying an existing Exchange Sync configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Exchange Configuration**, and then complete the required fields.
3. In the Assign Users and Profiles section, select either *`Profiles`* or *`Users`* in the `Search` drop-down list.
4. If you don't see the member you want to add, enter keywords in the search box and click **Find**.
5. Select members from the Available Members box, and click **Add** to add them to the group. If all available users are assigned to this configuration, the Users list is empty and you can only assign profiles.
6. To remove members, select those members and click **Remove**.
7. Click **Save**.

SEE ALSO:

How Exchange Sync Manages Sync Conflicts with Salesforce for Outlook

How Can I Avoid Syncing Data Between My Salesforce Organizations?

How Can I Avoid Syncing Data Between My Salesforce Organizations?

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

If your company uses Exchange Sync in multiple Salesforce organizations, make sure the data in those organizations remains separate by being mindful about how you set up your Exchange Sync configurations.

You're using multiple organizations if you either:

- Test new features in a sandbox organization before setting up the feature in your live organization.
- Maintain separate Salesforce organizations for different divisions of your company.

To prevent Exchange Sync from syncing contacts and events between your Salesforce organizations, don't add the same user to Exchange Sync configurations in more than one organization.

We don't recommend marking an Exchange Sync configuration as inactive to prevent data from syncing between your Salesforce organizations. While marking a configuration as inactive prevents it from syncing a user's data, you risk forgetting that user is included in multiple Exchange Sync configurations, and marking the configuration as active later.

Example: You're testing Exchange Sync features in your sandbox organization, so you add user Marianne Schumacher to an Exchange Sync configuration in the sandbox organization. After you're satisfied with how you've set up Exchange Sync features for Marianne, you're ready to add her to an Exchange Sync configuration in your live organization.

Before you add Marianne to an Exchange Sync configuration in your live organization, remove her from the configuration in your sandbox organization. Otherwise, Exchange Sync can sync contacts and events between Marianne's email application, the sandbox organization, and the live organization, saving test and live data to all three data sources.

Fix Sync Issues for Exchange Sync Users

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

If an Exchange Sync user has trouble syncing between Microsoft® Exchange and Salesforce, you can troubleshoot sync issues by checking your users' sync statuses or running an Exchange Sync error report. If you find a sync issue that a user can't overcome, then you can reset that user's sync process for them.

- Check Exchange Sync Users' Sync Statuses
- Build and Run an Exchange Sync Error Report
- Reset Sync for Exchange Sync Users

Check Exchange Sync Users' Sync Statuses

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Exchange Sync statuses:
- "View Setup and Configuration"

If your users can't sync, you can check their sync statuses—and the sync status of your Exchange Sync setup—to learn where sync is failing.

1. From Setup, enter `Exchange Sync Status` in the `Quick Find` box, then select **Exchange Sync Status**.
2. Type the name of the user whose sync status you'd like to check, and click **Check Status**.
   The sync status for that user is displayed.

In some cases, you may need to reset sync for a user.

If you need help interpreting sync statuses, or need recommendations on correcting sync issues, check out Exchange Sync Statuses.

SEE ALSO:

Build and Run an Exchange Sync Error Report

Reset Sync for Exchange Sync Users

Build and Run an Exchange Sync Error Report

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or update custom report types:
- "Manage Custom Report Types"

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

If your Exchange Sync users can't sync, you can build and run an error report to discover what's causing sync to fail in your organization, and for which users. The report details provide suggestions to help you troubleshoot sync issues.

First, you'll create a custom report type using an Exchange Sync Error Report custom object we've set up for you in Salesforce. Then, you'll create an Exchange Sync error report. Finally, you'll run your report to help your users fix those pesky sync errors they're experiencing.

1. Create a custom report type. Set the `Primary Object` to **ExchangeSyncError**.
2. Create your Exchange Sync error report. From the Reports tab, click **New Report**. Set the `Report Type` to the Exchange Sync report type you created in step 1, and click **Create**.
3. Save and run your Exchange Sync error report. From the unsaved report, click **Save**, complete the required fields, and click **Save and Run Report**.
   Salesforce generates a list of errors sync errors found in your organization, or displays "Grand Totals (0 records)" if the report couldn't identify any sync errors.

If the report couldn't identify any errors, but users still can't sync, contact Salesforce.

SEE ALSO:

Exchange Sync Statuses

Reset Sync for Exchange Sync Users

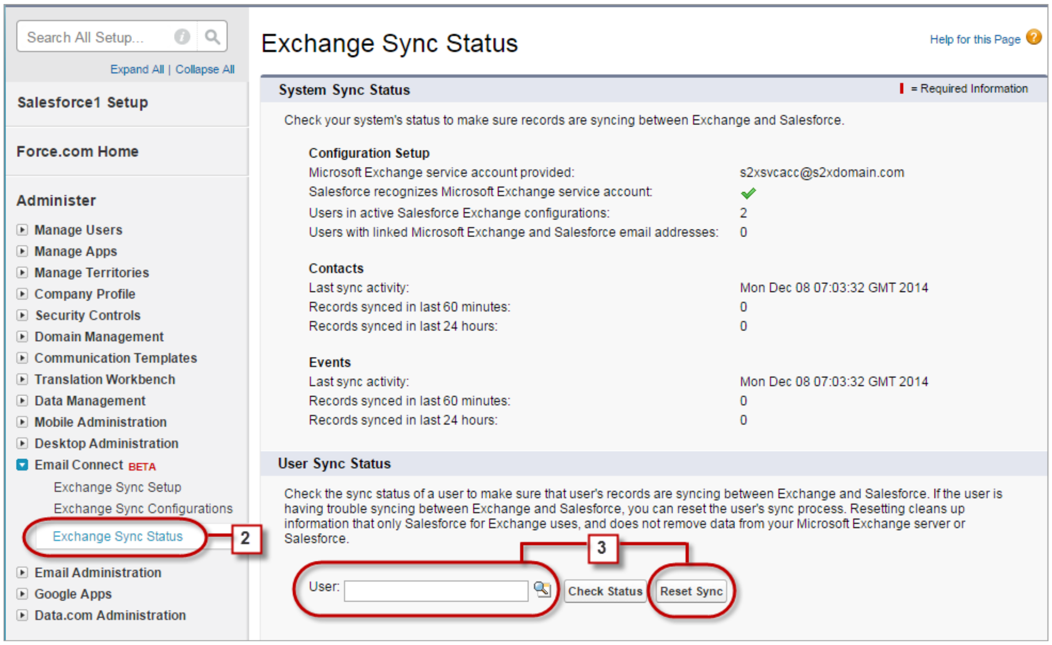
If a user has trouble syncing between Microsoft Exchange and Salesforce, you can reset that user's sync process. This process clears out and then restores the connections between a user's Exchange and Salesforce records. Resetting the sync process won't affect information stored in those records.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. Make sure that your user's `Salesforce_Sync` folder contains only the contacts the user wants to sync with Salesforce, and the events the user doesn't want to sync are marked as `Private` in the user's calendar application.
2. From Salesforce Setup, enter *`Exchange Sync Status`* in the `Quick Find` box, then select **Exchange Sync Status**.



Exchange Sync Status

System Sync Status

Check your system's status to make sure records are syncing between Exchange and Salesforce.

Configuration Setup
Microsoft Exchange service account provided: s2xsvcacc@s2xdomain.com
Salesforce recognizes Microsoft Exchange service account: ✓
Users in active Salesforce Exchange configurations: 2
Users with linked Microsoft Exchange and Salesforce email addresses: 0

Contacts
Last sync activity: Mon Dec 08 07:03:32 GMT 2014
Records synced in last 60 minutes: 0
Records synced in last 24 hours: 0

Events
Last sync activity: Mon Dec 08 07:03:32 GMT 2014
Records synced in last 60 minutes: 0
Records synced in last 24 hours: 0

User Sync Status

Check the sync status of a user to make sure that user's records are syncing between Exchange and Salesforce. If the user is having trouble syncing between Exchange and Salesforce, you can reset the user's sync process. Resetting cleans up information that only Salesforce for Exchange uses, and does not remove data from your Microsoft Exchange server or Salesforce.

3. Type a user's name, and click **Reset Sync**.
   During the next sync cycle, Exchange Sync will sync:
   - All contacts from the user's `Salesforce_Sync` folder in Exchange to Salesforce, excluding contacts that fall outside of the filters you set in the user's Exchange configuration.
   - All events from the user's calendar in Exchange to Salesforce, excluding events that fall outside of the filters you set in the user's Exchange configuration, or events the user marked as `Private` in Exchange.

Exchange Sync Statuses

Understanding Exchange Sync statuses helps you assess and correct Exchange Sync errors that appear on the Exchange Sync status page in Salesforce.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

System Sync Statuses

Table 2: Configuration Setup Statuses

If	Provides this status	This status means that
Microsoft Exchange service account provided:	`Your Service Account User Name`	You've saved your service account credentials in Salesforce, and Exchange Sync has recognized a valid service account. This status doesn't necessarily mean that the service account is set up to sync using Exchange Sync. If you continue to have sync errors, we recommend that you use Microsoft®'s Remote Connectivity Analyzer tool to test your connection and troubleshoot setup issues.
	None	Exchange Sync couldn't save your service account credentials. Verify that you've provided the correct service account ID and password and that you've set up a valid service account in Microsoft Exchange.
Salesforce recognizes Microsoft Exchange service account:	☑	Exchange Sync has recognized that the service account that you provided is valid. This status doesn't necessarily mean that the service account is set up to sync using Exchange Sync. If you continue to have sync errors, we recommend that you use Microsoft®'s Remote Connectivity Analyzer tool to test your connection and troubleshoot setup issues.
	☒	Exchange Sync couldn't recognize the service account credentials. Check to make sure that you've set up a valid service account in Microsoft Exchange.
Users in active Salesforce Exchange configurations:	The correct number of Exchange Sync users	All of your Exchange Sync users are in active Exchange configurations.
	The incorrect number of Exchange Sync users	Some of your users are not in active Exchange configurations.
	0	None of your users is in active Exchange Sync configurations.
Users with linked Microsoft Exchange and Salesforce email addresses:	The expected number of Exchange Sync users	All of your users' Microsoft Exchange email addresses have mapped correctly to the corresponding Salesforce email addresses.
	An unexpected number of Exchange Sync users	Some of your users' Microsoft Exchange email addresses have not mapped correctly to the corresponding Salesforce email addresses. Compare your users' addresses

If	Provides this status	This status means that
		in Exchange and Salesforce to verify that they match.
	0	None of your users' Microsoft Exchange email addresses has mapped to its corresponding Salesforce email addresses. Contact Salesforce Customer Support.

Table 3: Contacts Statuses

If	Provides this status	This status means that
Last sync activity:	A contact sync time within the last few minutes	Your organization last synced contacts with Exchange Sync on this date, at this time. In general, Exchange Sync is syncing records as expected. If you see this status and individual users still report that contacts are not syncing as expected, check your Exchange server or Exchange Sync configurations for settings related to those particular users.
	A contact sync time within a few hours	Your organization last synced contacts on this date, at this time. It's possible you recently set up Exchange Sync for your organization, because the initial contacts sync might take up to several hours to complete. If you haven't initiated contacts sync for your organization for the first time, this status might indicate a problem with contacts sync in your organization. Monitor the last sync activity over the next 24 hours to see if syncing resumes.
	A contact sync time on a past date	Your organization last synced contacts on this date, at this time. If your organization doesn't sync again within 24 hours, verify that you provided the correct Exchange service account credentials, that Salesforce recognized your service account, and that you've used Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Exchange Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.

If	Provides this status	This status means that
Records synced in last 60 minutes:	The number of contacts that were synced in your organization in the last 60 minutes	Within the last 60 minutes, your organization last synced this number of contacts.
	0	Your organization hasn't synced any contacts within the last 60 minutes. Monitor record sync activity over the next 24 hours to see if sync resumes. If sync doesn't resume, use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Exchange Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.
Records synced in last 24 hours:	The number of contacts that were synced in your organization over the last 24 hours	Within the last 24 hours, your organization synced this number of contacts.
	0	Your organization hasn't synced any contacts within the last 60 minutes. Use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Exchange Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.

Table 4: Events Statuses

If	Provides this status	This status means that
Last sync activity:	An event sync time within the last few minutes	Your organization last synced events with Exchange sync on this date, at this time. In general, Exchange Sync is syncing records as expected. If you see this status and individual users still report that events are not syncing as expected, check your Exchange server or Exchange Sync configurations for settings related to those particular users.
	An event sync time within a few hours	Your organization last synced events on this date, at this time. You might have recently set up Exchange Sync for your organization, because the initial events sync might take up to several hours to complete. If you haven't initiated events sync for your organization for the first time, this status might indicate a problem with events sync

If	Provides this status	This status means that
		in your organization. Monitor the last sync activity over the next 24 hours to see if syncing resumes.
	An event sync time on a past date	Your organization last synced events on this date, at this time. If your organization doesn't sync again within 24 hours or longer, verify that you provided the correct Exchange service account credentials, that Salesforce recognized your service account, and that you've used Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Exchange Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.
Records synced in last 60 minutes:	The number of events that were synced in your organization in the last 60 minutes	Within the last 60 minutes, your organization last synced this number of events.
	0	Your organization hasn't synced any events within the last 60 minutes. Monitor record sync activity over the next 24 hours to see if syncing resumes. If syncing doesn't resume, use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Exchange Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.
Records synced in last 24 hours:	The number of contacts that were synced in your organization in the last 24 hours	Within the last 24 hours, your organization synced this number of contacts.
	0	Your organization hasn't synced any events within the last 60 minutes. Use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Exchange Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.

User Sync Statuses

Table 5: Configuration Setup Statuses

If	Provides this status	This status means that
User assigned to active Exchange configuration:	☑	This user is set up to sync in an active Exchange Sync configuration.
	☒	This user isn’t set up to sync in an active Exchange Sync configuration.
User recognized by Exchange service account:	☑	This user is represented by the service account that you’ve set up in Exchange, and Exchange Sync can communicate with your Exchange service account.
	☒	This user isn’t represented by the service account that you’ve set up in Exchange, or Exchange Sync can’t communicate with the Exchange service account that you provided. Check your Exchange service account setup to verify that you’ve set up a valid service account and that it accurately represents this user.
User’s reset sync status:	Marked for reset	You’ve reset this user for sync, but the reset hasn’t started. Your reset request is in the system queue and will be completed when the system is available.
	Reset in progress	The reset sync process is in progress. When reset is complete, “User’s reset sync status” is no longer displayed on this page.

Table 6: Contacts Statuses

If	Provides this status	This status means that
Salesforce_Sync folder found:	☑	The Salesforce_Sync folder was found in this user’s email account under the Contacts directory.
	☒	Exchange Sync can’t find the Salesforce_Sync folder on your Exchange server or can’t create it automatically for this user. You can create the folder Salesforce_Sync for this user as a subdirectory under the Contacts directory in this user’s email account.
Salesforce and Exchange email addresses linked:	☑	This user’s Microsoft Exchange email address has mapped to the user’s Salesforce email address correctly.

If	Provides this status	This status means that
	☒	This user's Microsoft Exchange email address hasn't mapped to the user's Salesforce email address correctly. Reset sync for this user.
Salesforce to Exchange sync status:	Not started	This user's contacts hasn't started syncing from Salesforce to Exchange.
	Initial sync in progress	This user's contacts are syncing from Salesforce to Exchange for the first time. This initial sync might take several hours.
	Initial sync completed	This user's contacts have completed syncing from Salesforce to Exchange for the first time.
	Sync in progress	This user's contacts are syncing from Salesforce to Exchange right now.
	In sync	This user's contacts have completed syncing from Salesforce to Exchange.
	Exchange configuration not set to sync	This user isn't set up to sync contacts from Salesforce to Exchange in an active Exchange Sync configuration.
Exchange to Salesforce sync status:	Not started	This user's contacts have not started syncing from Exchange to Salesforce yet.
	Initial sync in progress	This user's contacts are syncing from Exchange to Salesforce for the first time. This initial sync might take several hours.
	Initial sync completed	This user's contacts have completed syncing from Exchange to Salesforce for the first time.
	Sync in progress	This user's contacts are syncing from Exchange to Salesforce.
	In sync	This user's contacts have completed syncing from Exchange Salesforce.
	Exchange configuration not set to sync	This user isn't set up to sync contacts from Exchange to Salesforce in an active Exchange Sync configuration.
Records in sync	The number of contacts that are syncing for this user	This user has this number of contacts syncing between Exchange and Salesforce. If this user's contacts are syncing as expected, this number matches the number of contacts in this user's Salesforce_Sync folder.

Table 7: Event Statuses

If	Provides this status	This status means that
Calendar folder found:	✓	The calendar folder was found in this user's email account.
	✗	Exchange Sync can't find the user's calendar folder on your Exchange server.
Salesforce and Exchange email addresses linked:	✓	This user's Microsoft Exchange email address has mapped to the user's Salesforce email address correctly.
	✗	This user's Microsoft Exchange email address hasn't mapped to the user's Salesforce email address correctly. Reset sync for this user.
Salesforce to Exchange sync status:	Not started	This user's events haven't started syncing from Salesforce to Exchange.
	Initial sync in progress	This user's events are syncing from Salesforce to Exchange for the first time. This initial sync might take several hours.
	Initial sync completed	This user's events have completed syncing from Salesforce to Exchange for the first time.
	Sync in progress	This user's events are syncing from Salesforce to Exchange right now.
	In sync	This user's events have completed syncing from Salesforce to Exchange.
	Exchange configuration not set to sync	This user isn't set up to sync events from Salesforce to Exchange in an active Exchange Sync configuration.
Exchange to Salesforce sync status:	Not started	This user's events haven't started syncing from Exchange to Salesforce.
	Initial sync in progress	This user's events are syncing from Exchange to Salesforce for the first time. This initial sync might take several hours.
	Initial sync completed	This user's events have completed syncing from Exchange to Salesforce for the first time.
	Sync in progress	This user's events are syncing from Exchange to Salesforce.
	In sync	This user's events have completed syncing from Exchange Salesforce.

If	Provides this status	This status means that
	Exchange configuration not set to sync	This user isn't set up to sync events from Exchange to Salesforce in an active Exchange Sync configuration.
Records in sync	The number of contacts that are syncing for this user	This user has this number of events syncing between Exchange and Salesforce. If this user reports difficulty syncing only some events, verify that the user is set up to sync events as expected in the user's Exchange Sync configuration and that the user didn't assign the `private` option to the event. Also remember that at this time, Exchange Sync doesn't sync all-day events, recurring events, or invitees on events.

Choosing an Email Integration Product

Which Microsoft® Email Integration Product is Right for My Company?

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Salesforce App for Outlook is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Salesforce for Outlook is available in: **All** Editions

Email to Salesforce is available in: **All** Editions

You may be wondering how Salesforce App for Outlook compares with our legacy products, Salesforce for Outlook and Email to Salesforce. Compare the products' system requirements to determine which product—or combination of products—is the best fit for your company.

Whether you're preparing to migrate from a retired product like Connect for Outlook, or considering Salesforce email integration for the first time, you'll help your sales professionals streamline the work they do between their Microsoft-based email and Salesforce when you set up Salesforce App for Outlook, Salesforce for Outlook, or Email to Salesforce.

Each email integration feature is unique, and compatible with different Microsoft products. You can introduce just one of these features to your users—or a combination—depending on which best fits your company's needs.

Sync Between Email Applications and Salesforce

Give your users the confidence that their records are up-to-date—whether users are working in their email app, or in Salesforce. Depending on the combination of email integration products you choose, you can help users keep contacts, events, and tasks in sync between their Microsoft email and Salesforce. To set up your users to sync items, consider either Exchange Sync—the sync component for Salesforce App for Outlook—or Salesforce for Outlook sync.

Experience Salesforce Directly from Email Applications

Set up your users to view and create Salesforce records, or add emails to Salesforce, without ever leaving their email apps. To set up your users to work with Salesforce records directly from their email, consider the Salesforce App for Outlook, the Salesforce for Outlook side panel, or Email to Salesforce.

Compare Microsoft Email Integration Products

Determine which features are best for you and your teams. First, compare the system requirements to learn which features are compatible with your company's computing environment. Then, take a look at our feature overviews to learn what each feature does.

If you're working with	This product lets you experience Salesforce directly from your email app	This product lets you add emails to Salesforce records	This product lets you sync contacts and events	This product lets you sync tasks
Exchange Online (Office 365) and • Outlook 2016 • Outlook 2013	Salesforce App for Outlook or Salesforce for Outlook Side Panel	Salesforce App for Outlook or Salesforce for Outlook Side Panel	Exchange Sync or Salesforce for Outlook sync	Salesforce for Outlook sync
Exchange 2013 (on-premises) and • Outlook 2016 • Outlook 2013	Salesforce App for Outlook or Salesforce for Outlook Side Panel	Salesforce for Outlook Side Panel	Exchange Sync or Salesforce for Outlook sync	Salesforce for Outlook sync
Exchange 2010 and • Outlook 2016 • Outlook 2013 • Outlook 2010	Salesforce for Outlook Side Panel	Salesforce for Outlook Side Panel	Exchange Sync or Salesforce for Outlook sync	Salesforce for Outlook sync
Exchange 2007 and • Outlook 2013 • Outlook 2010 • Outlook 2007	Salesforce for Outlook Side Panel	Salesforce for Outlook Side Panel	Salesforce for Outlook sync	Salesforce for Outlook sync
Mac OS X and Exchange Online (Office 365) and Outlook Web App (OWA)	Salesforce App for Outlook	Email to Salesforce	Exchange Sync	
Mac OS X and • Exchange 2013		Email to Salesforce	Exchange Sync	

If you're working with	This product lets you experience Salesforce directly from your email app	This product lets you add emails to Salesforce records	This product lets you sync contacts and events	This product lets you sync tasks
- Exchange 2010				
Mobile		Email to Salesforce	Exchange Sync	

SEE ALSO:

Considerations for Running Salesforce App for Outlook and Salesforce for Outlook Simultaneously

Exchange Sync (Beta) Syncs your Microsoft® Items

Salesforce App for Outlook

Running Multiple Email Integration Features Simultaneously

Considerations for Running Salesforce App for Outlook and Salesforce for Outlook Simultaneously

Depending on your company's computing environment and the email integration solutions your users are looking for, you can set up features from both Salesforce App for Outlook and Salesforce for Outlook to meet those needs. Before you begin set up, get up to speed on the feature limitations you face and learn how Salesforce manages sync conflicts between the two systems.

IN THIS SECTION:

Limitations for Running Salesforce App for Outlook and Salesforce for Outlook Simultaneously
While you can enable both Salesforce App for Outlook and the Salesforce for Outlook Side Panel in the same organization, users can't run both Outlook integration features at the same time.

How Exchange Sync Manages Sync Conflicts with Salesforce for Outlook
Learn how Salesforce manages sync conflicts when users are assigned to sync the same records for both features.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Salesforce App for Outlook available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Salesforce for Outlook available in: **All** Editions

Limitations for Running Salesforce App for Outlook and Salesforce for Outlook Simultaneously

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Salesforce App for Outlook in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Salesforce for Outlook available in: **All** Editions

While you can enable both Salesforce App for Outlook and the Salesforce for Outlook Side Panel in the same organization, users can't run both Outlook integration features at the same time.

To prevent your users from juggling multiple email integration features at one time, Salesforce automatically disconnects the Salesforce for Outlook side panel when users connect toSalesforce App for Outlook. Salesforce App for Outlook users can still download, install, and sync with Salesforce for Outlook, but only the Salesforce App for Outlook can run in Outlook.

SEE ALSO:

Which Microsoft® Email Integration Product is Right for My Company?

How Exchange Sync Manages Sync Conflicts with Salesforce for Outlook

How Exchange Sync Manages Sync Conflicts with Salesforce for Outlook

EDITIONS

Available in for set up in: both Salesforce Classic and Lightning Experience

Exchange Sync available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Salesforce for Outlook available in: **All** Editions

Learn how Salesforce manages sync conflicts when users are assigned to sync the same records for both features.

Note: Exchange Sync is currently available as a beta feature, which means it's a high-quality feature with known limitations. Check out our Exchange Sync Implementation Guide to set up the feature at your company.

If you're migrating your users from Salesforce for Outlook to Exchange Sync, or have set up your Exchange Sync users to use the Salesforce side panel, you'll have assigned users to configurations for both products.

If you've assigned a user to sync the same records with conflicting settings in both an Outlook configuration and an Exchange Sync configuration, Salesforce automatically gives preference to the settings you've set for that kind of record in the Exchange Sync configuration.

Because Salesforce gives preference by record, not by configuration, there's a chance that a user set up to sync through both features might end up syncing some kinds of records with Salesforce for Outlook, and some with Exchange Sync.

For example, if a user is assigned to sync contacts, events, and tasks in an Outlook configuration and contacts and events in an Exchange Sync configuration, then the users' tasks would sync with Salesforce for Outlook, and the users' contacts and events would sync with Exchange Sync.

Though Salesforce manages these conflicts for you, we recommend disabling Salesforce for Outlook sync settings for your Exchange Sync users.

This best practice prevents you from losing track of which users are syncing from each feature, in case your configuration settings become more complicated over time.

Note: You can set up your Exchange Sync users to work with their records from the Salesforce Side Panel, even though it's a Salesforce for Outlook feature. You can set this up by adding those Exchange Sync users to an Outlook configuration with disabled sync, and enabling the `Side Panel` option.

SEE ALSO:

Which Microsoft® Email Integration Product is Right for My Company?

Limitations for Running Salesforce App for Outlook and Salesforce for Outlook Simultaneously

Administering Salesforce for Outlook

Salesforce for Outlook System Requirements

Before you download and install Salesforce for Outlook, make sure that your system meets these requirements.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

Basic Resource	Required Version
Salesforce for Outlook	Users are required to upgrade to version 3.0.0 it's available, and before Salesforce encryption protocol in 2016.
Default email program	Microsoft® Outlook® using either Microsoft Exchange Online (the Microsoft-hosted service that integrates with Office 365™) or Microsoft Exchange Server, along with the latest hot fixes. • 2016 • 2013 • 2010 • 2007 Salesforce for Outlook supports Outlook installed using Click-to-Run (a streaming installer for Microsoft Office).
Operating system	Microsoft Windows®, along with the latest hot fixes. • Windows 10 • Windows 8.1 (Pro and Enterprise) • Windows 7 We don't support using Salesforce for Outlook with Apple® Mac OS®.
Browser	Internet Explorer with TLS encryption protocol 1.1 or later enabled. See "Other Requirements" for feature-specific browser limitations.

Other Requirements

Other Features	Requirement
Creating records using the Salesforce Side Panel Publisher	You need Microsoft® Internet Explorer® 9 or later.
Server configurations	We support using these systems that connect to the Internet through a proxy server. • Automatic proxy detection • Manual proxy • NTLM proxy authentication
	We don't support using:

Other Features	Requirement
	- IMAP and POP3 email servers - Terminal servers, such as Citrix® servers - Proxy Automatic Configuration files (.pac)
Installers	If you're an administrator and plan to use the `.msi` installer, you may need to install the following tools: - Microsoft .NET Framework 4.6 - Microsoft Visual Studio® 2010 Tools for Office Runtime - Primary Interop Assemblies (PIA) Redistributable for your version of Microsoft Outlook Windows 7 `.msi` users must run the command prompt as an administrator and then launch the installer from the command line. For example: *`msiexec /i SalesforceForOutlook.msi`*.
Single Sign-On	We support using either: - Delegated authentication - Security Assertion Markup Language (SAML) with My Domain We don't support using a separate online identity provider for single sign-on.

Available Salesforce for Outlook Features by Salesforce Edition

Your Salesforce edition determines which features your sales reps can access.

Functionality	Available in Contact Manager, Group Editions	Available in Professional, Enterprise, Performance, Unlimited, and Developer Editions
Add Microsoft® Outlook® emails to Salesforce records		✓
Sync contacts, events, and tasks between Salesforce and Outlook	✓	✓
Set sync directions, filters, and features enabled for users through Outlook Configurations		✓
Give sales reps access to the Salesforce Side Panel	✓	✓
Let reps create Salesforce records directly in the side panel publisher	✓	✓
Let administrators create publisher layout menus for the side panel, without affecting other publisher layouts		✓
Let administrators create multiple side panel publisher layouts and assign them to different user profiles		✓

Outlook Configurations and Outlook Publisher Layouts

Help Salesforce for Outlook users easily maintain their records between Microsoft® Outlook® and Salesforce by creating separate settings for groups of users with different needs. To do so, from Setup, enter `Outlook Configurations` in the `Quick Find` box, then select **Outlook Configurations**.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
- "View Setup and Configuration"

To create, edit, or delete configurations:
- "Manage Email Client Configurations"

Salesforce for Outlook Configurations

Salesforce for Outlook configurations include settings for the data that Salesforce for Outlook users can sync between Microsoft® Outlook® and Salesforce. Administrators can create separate configurations for different types of users, and give users permission to edit some of their own settings. For example, an opportunity team might want to sync everything, while a manager might want to sync only events.

In addition, you can set up your users to create, view, and work with Salesforce records directly in Outlook from the Salesforce Side Panel. The side panel allows users to easily add Outlook emails, events, and tasks to related Salesforce records.

Outlook Publisher Layouts

Users can create accounts, cases, leads, opportunities, and even custom objects directly from the side panel using the side panel publisher. To set up your users to work with the side panel publisher, you'll create the quick actions that you want to appear in your users' publisher menus, add those quick actions to the appropriate publisher layouts, and assign the publisher layouts to the right users.

SEE ALSO:

- Create Salesforce for Outlook Configurations
- Define Data Sets for Salesforce for Outlook
- Salesforce for Outlook Configurations for Contact Manager and Group Editions
- Set Up Users to Create Records Directly from the Salesforce Side Panel

Create Salesforce for Outlook Configurations

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:

- "View Setup and Configuration"

To create, edit, or delete configurations:

- "Manage Email Client Configurations"

1. From Setup, enter *`Outlook Configurations`* in the `Quick Find` box, then select **Outlook Configurations**.
2. Click **New Outlook Configuration**.
3. Enter a name and description of the configuration.
4. Select `Active` to activate the configuration.
5. Select `Notify of product updates` so that users can see when upgrades for Salesforce for Outlook are available to download.
6. Depending on the configuration, you'll need to define some or all of these settings.
   - Assigned users and profiles
   - Email-related options for add email and create cases
   - Sync direction
   - Conflict behavior
   - Field mappings
   - Matching criteria
   - Modification permissions
   - Advanced settings
7. Click **Save**.
8. Define data sets.

When users log in to Salesforce from the Salesforce for Outlook setup wizard, these settings take effect immediately. If you deactivate a configuration and the assigned users are listed on another active configuration through a profile, the active configuration is used the next time they open Outlook.

SEE ALSO:

Salesforce for Outlook Configurations for Contact Manager and Group Editions

Assign Users to Salesforce for Outlook Configurations

After you define basic information for a Salesforce for Outlook configuration, you select the Salesforce for Outlook users that the configuration's settings will apply to.

1. From Setup, enter `Outlook Configurations` in the `Quick Find` box, then select **Outlook Configurations**.
2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields.
3. In the Assign Users and Profiles section, select either `Profiles` or `Users` in the `Search` drop-down list.
4. If you don't see the member you want to add, enter keywords in the search box and click **Find**.
5. Select members from the Available Members box, and click **Add** to add them to the group. If all available users are assigned to this configuration, the Users list is empty and you can only assign profiles.
6. To remove members, select those members and click **Remove**. If removed users are assigned to another active configuration through a profile, that other configuration is used the next time they open Outlook. Otherwise, removed users are unable to use Salesforce for Outlook.
7. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.
   If you assign a user who is already assigned to a different configuration, that user is removed from the other configuration and assigned to this one. If an assigned user is also part of a profile assigned to another active configuration, the configuration that lists the user directly is used.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
- "View Setup and Configuration"

To create, edit, or delete configurations:
- "Manage Email Client Configurations"

SEE ALSO:

Create Salesforce for Outlook Configurations

Outlook Configurations and Outlook Publisher Layouts

Set Up Email Options for Salesforce for Outlook

Define Data Settings for Salesforce for Outlook

Data settings control the sync behavior and email functionality of Salesforce for Outlook. You can define the following settings using the Data Settings fields in a Salesforce for Outlook configuration.

- Email-related options for add email and create cases
- Sync direction
- Conflict behavior
- Field mappings
- Matching criteria
- Modification permissions

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
- "View Setup and Configuration"

To create, edit, or delete configurations:
- "Manage Email Client Configurations"

Set Up Email Options for Salesforce for Outlook

Help your sales teams track important Microsoft® Outlook® emails related to Salesforce contacts and leads. And get those contacts and leads to appear directly in Outlook.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
- "View Setup and Configuration"

To create, edit, or delete configurations:
- "Manage Email Client Configurations"

To enable Add Email, Side Panel, and Create Case:
- "Customize Application"

Enable the Salesforce Side Panel

Let your sales reps see Salesforce contacts and leads that are relevant to your reps' emails and events.

1. From Setup, enter `Outlook Configurations` in the `Quick Find` box, then select **Outlook Configurations**.
2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields.
3. Select `Side Panel`.
4. Save your changes.

Let Side Panel Sales Reps Add Emails, Attachments, Events, and Tasks to Records

The `Add Email` setting lets them add Outlook emails and their attachments (), events (), and tasks () to their Salesforce records directly from the side panel. You can also let your reps `Allow users to select attachments` (), which lets sales reps choose specific attachments to add to Salesforce, instead of automatically including them all.

1. From Setup, enter `Outlook Configurations` in the `Quick Find` box, then select **Outlook Configurations**.
2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields.

3. Select `Side Panel`.
4. Select `Add Email`.
5. Save your changes.
6. To let reps choose specific attachments to add to Salesforce, select **Allow users to select attachments**.

Let Users Who Aren't Working in the Side Panel Add Emails and Attachments to Records

For sales reps who don't have the side panel enabled, the `Add Email` setting adds the **Add Emails** and **Send and Add** buttons to the Outlook ribbon. The setting also lets your reps add up to 10 emails simultaneously to Salesforce.

1. From Setup, enter *`Outlook Configurations`* in the `Quick Find` box, then select **Outlook Configurations**.
2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields.
3. Deselect `Side Panel`.
4. Select `Add Email`.
5. Save your changes.
6. If you don't have My Email to Salesforce enabled, click **Enable** in the popup message to enable it.

Let Users Who Aren't Working in the Side Panel Create Cases from Outlook

For sales reps who don't have the side panel enabled, the **Create Cases** setting adds the drop-down list button to Outlook. The setting also lets your reps create Salesforce cases from Outlook emails. If you've enabled the side panel for your reps, you can give them access to the Side Panel Publisher. The publisher lets your reps create various kinds of Salesforce records directly from the side panel.

Note: Before you can enable the Create Case feature, review and complete the procedures in Set Up Create Case for Salesforce for Outlook Users on page 330. Then, return to this topic to complete the following procedure.

1. From Setup, enter *`Outlook Configurations`* in the `Quick Find` box, then select **Outlook Configurations**.
2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields.
3. Clear the `Side Panel` option.
4. Select `Create Case`. Then, choose one of these links.
   - *Recommended:* **Choose an Existing Create Case Destination**, which lets you choose existing destinations. You can choose up to 10 destinations for each Outlook configuration.
   - **Create a New Create Case Destination**. To create one, save your work first, then create the destination. After that, return to the Outlook Configuration page to complete the Create Case setup requirements.
5. Save your changes.

SEE ALSO:

Create Salesforce for Outlook Configurations

Assign Users to Salesforce for Outlook Configurations

Set Up Users to Create Records Directly from the Salesforce Side Panel

Learn How Enabling Recurring Events Affects Users

Your Salesforce and API users can expect the following changes after you enable the Salesforce for Outlook Recurring Events feature.

EDITIONS

Available for set up from: both Salesforce Classic and Lightning Experience

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

For	You should know that
Salesforce users	Changes made to a series don't affect past events.
	Changes made to the following fields in an event series override changes previously made to single events. • Event start or end time • All-day event • Frequency • Recurrence start date, if a user sends updates to invitees In addition, if users change any of those fields, all events in the series are deleted and re-created. As a result, the status of all invitees is reset to Not Responded.
API users	After users start syncing recurring events, the following read-only API objects appear in the API. • EventRecurrenceException • TaskRecurrenceException

SEE ALSO:

Set Up Email Options for Salesforce for Outlook

Outlook Configurations and Outlook Publisher Layouts

Set Up Create Case for Salesforce for Outlook Users

The Create Case feature in Salesforce for Outlook lets users create cases in Salesforce from emails in Microsoft® Outlook®. As an administrator, you can create Email-to-Case destinations that appear in the drop-down list button **Create Cases** in Outlook. For each destination, you choose the assignee, which can be either individual users or queues. You can add up to 10 destinations for each Outlook configuration. When users create cases, they can add up to 10 emails simultaneously for each destination.

Before Salesforce for Outlook users can create cases from Outlook emails, you'll need to perform the following procedures.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

1. If you haven't already done so, enable and configure On-Demand Email-to-Case.
2. Define Email-to-Case destinations (also known as email routing addresses).
3. Enable the Create Case feature in your configurations, which adds the **Create Cases** drop-down list button in Outlook.

Salesforce for Outlook assigns a category to the emails that Salesforce for Outlook users add as cases to Salesforce. This category, *Added to Salesforce as a case*, makes it easy for users to search for emails they added as cases to Salesforce.

SEE ALSO:

Set Up Users to Create Records Directly from the Salesforce Side Panel

Create Salesforce for Outlook Configurations

Set Up Email Options for Salesforce for Outlook

Define Sync Directions for Your Salesforce for Outlook Users

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:

- "View Setup and Configuration"

To create, edit, or delete configurations:

- "Manage Email Client Configurations"

Set sync directions for sales reps who sync contacts, events, and tasks between Microsoft® Outlook® and Salesforce.

1. From Setup, enter `Outlook Configurations` in the `Quick Find` box, then select **Outlook Configurations**.
2. Create or edit a configuration, and select one of these sync directions under Data Settings for each object being synced.
    - `Don't sync`—Outlook and Salesforce records aren't synced, and you can't select an Outlook folder to sync within the setup wizard.
    - `Salesforce to Outlook`—When data first syncs, a record in Salesforce creates or updates a record in Outlook. During future syncs, changes made to Salesforce records appear in Outlook, regardless of whether the Outlook version of the record has changed. In addition, deleting a synced record in Salesforce deletes its Outlook counterpart. Outlook changes are never sent to Salesforce. The required conflict behavior setting for this option is `Salesforce always wins`.
    - `Outlook to Salesforce`—During its first sync, a record in Outlook creates or updates a record in Salesforce. During future syncs, changes made to Outlook records appear in Salesforce, regardless of whether the Salesforce version has changed. In addition, deleting a synced record in Outlook deletes its Salesforce counterpart. Salesforce changes are never sent to Outlook. The required conflict behavior setting for this option is `Outlook always wins`. This option isn't available for contacts.
    - `Sync both ways`—When records sync, changes to Outlook and Salesforce sync between the two systems. If records conflict, the conflict behavior setting determines which record wins.
3. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.
4. Define a data set for each object that has a sync direction.

SEE ALSO:

Outlook Configurations and Outlook Publisher Layouts

Set Up Email Options for Salesforce for Outlook

Create Salesforce for Outlook Configurations

Define Data Sets for Salesforce for Outlook

Define Conflict Behavior for Salesforce for Outlook

Conflict behavior settings determine what happens when Salesforce for Outlook encounters a conflict when syncing data both ways. A conflict occurs when the same record is updated in both Salesforce and Outlook or when a record is updated on one side and deleted on the other.

1. From Setup, enter `Outlook Configurations` in the `Quick Find` box, then select **Outlook Configurations**.
2. Edit a configuration, and select one of the following conflict behaviors under Data Settings for Contacts, Events, and Tasks.
    - *`Salesforce always wins`*
    - *`Outlook always wins`*
3. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

SEE ALSO:

Outlook Configurations and Outlook Publisher Layouts

Create Salesforce for Outlook Configurations

Customize the Fields That Sync Between Salesforce and Microsoft® Outlook®

Define Sync Directions for Your Salesforce for Outlook Users

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
- "View Setup and Configuration"

To create, edit, or delete configurations:
- "Manage Email Client Configurations"

Customize the Fields That Sync Between Salesforce and Microsoft® Outlook®

Customize fields in the records that your sales reps sync using Salesforce for Outlook. Also add custom Outlook or Salesforce fields you want your reps to sync.

Field mappings define which Salesforce and Outlook fields correspond when items sync between the two systems. Salesforce comes with a set of default mappings. Decide whether to let your sales reps edit their own field mappings in their personal settings.

Map these custom field types.

- Outlook text fields
- Salesforce text fields
- Some Salesforce picklist fields

Edit default field mappings or set up custom field mappings for your reps.

1. From Setup, enter `Outlook Configurations` in the `Quick Find` box, then select **Outlook Configurations**.
2. Select an Outlook Configuration you'd like to edit, or create a new one.
3. Under Data Settings, click **Edit Field Mappings** under `Contacts`, `Events`, or `Tasks` to display all the fields for records on that object.
4. Review which Salesforce fields are mapping to each Outlook field.
5. Edit the Salesforce or Outlook field mappings you'd like to change, or create mappings for custom fields. Salesforce for Outlook lets you edit any field mapping with a picklist. You can add more mappings at the bottom of the list. You can remove mappings by clicking the X next to the mapping.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
- "View Setup and Configuration"

To create, edit, or delete configurations:
- "Manage Email Client Configurations"

Warning: If you map a custom field that is universally required, make sure that it has a default value to avoid errors. Also, mapping custom fields that require validation by Salesforce can cause sync errors. For example, you map a custom Salesforce field that requires a unique value. If you enter a non-unique value in the Outlook field, you receive a sync error.

6. Click **Save**. Field mappings begin syncing on items the next time those items are updated in either Salesforce or Outlook.

SEE ALSO:

Create Salesforce for Outlook Configurations

Outlook Configurations and Outlook Publisher Layouts

Define Matching Criteria for Salesforce for Outlook

Define Conflict Behavior for Salesforce for Outlook

Define Matching Criteria for Salesforce for Outlook

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
- "View Setup and Configuration"

To create, edit, or delete configurations:
- "Manage Email Client Configurations"

Define how Salesforce for Outlook handles multiple matching Salesforce contacts when a contact first syncs from Outlook.

1. From Setup, enter `Outlook Configurations` in the `Quick Find` box, then select **Outlook Configurations**.
2. Edit a configuration, and select one of these matching criteria options under Data Settings for contacts.
   - `Most recent activity`—Choose the Salesforce contact that shows the most recent activity (such as a phone call or email), as shown in the contact's Activity History related list. This option is the default matching criteria.
   - `Last updated`—Choose the Salesforce contact that was most recently modified.
   - `Oldest`—Choose the Salesforce contact that has the earliest creation date.
3. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

If we don't find a matching contact in Salesforce, we create one that syncs with the Outlook contact. We then either assign the synced contact to a Salesforce account, leave it unassigned, or place it in your sales rep's My Unresolved Items page.

SEE ALSO:

Create Salesforce for Outlook Configurations

Outlook Configurations and Outlook Publisher Layouts

Customize the Fields That Sync Between Salesforce and Microsoft® Outlook®

Let Users Modify Salesforce for Outlook Settings

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
- "View Setup and Configuration"

To create, edit, or delete configurations:
- "Manage Email Client Configurations"

1. From Setup, enter *`Outlook Configurations`* in the `Quick Find` box, then select **Outlook Configurations**.
2. Edit a configuration, and select any of the following options under Data Settings for each object being synced. You can allow users to modify:
   - `Whether object is synced`
   - `Sync direction`
   - `Conflict behavior`
   - `Field mappings`
3. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

You can overwrite users' modifications any time by selecting `Overwrite configuration changes made by users` in a configuration. After you save the updated configuration, the new settings replace the existing settings for users of the configuration the next time their data syncs.

Assign Users' Sync Folders in Microsoft® Outlook®

EDITIONS

Available for set up in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create and edit Outlook configurations:
- "Configure Application"

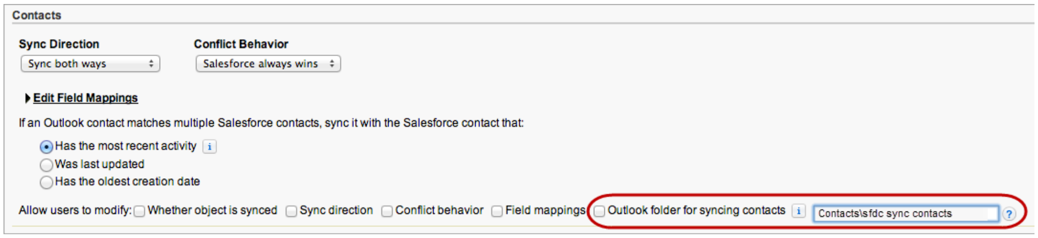
You can assign your Salesforce for Outlook users' contact, event, and task sync folders in Outlook to simplify their setup process and keep sync folders consistent across your company. You can specify Outlook sync folders from Salesforce Outlook configurations.

By default, users can change the Outlook folders where their Salesforce contacts, events, and tasks sync from the Settings menu in their Salesforce for Outlook system tray. You can prevent users from changing their Outlook sync folders when you clear this default setting for contacts, events, and tasks, and assign specific Outlook sync folders from users' Outlook configurations.

Note: Assigning Outlook sync folders might create Outlook directory folders for all of the users in your Outlook configuration. Salesforce for Outlook can't remove Outlook sync folders from your users' Outlook directories after they've been created. If you reassign a different folder later, the original folder remains in users' local Outlook directories until users delete the folder.

1. From Setup, enter *`Outlook Configurations`* in the `Quick Find` box, then select **Outlook Configurations**.
2. Open an Outlook configuration.
3. To assign a folder where users sync contacts, in Data Settings, deselect **Outlook folder for syncing contacts** on the `Allow users to modify:` setting.
4. In the text box that appears, type the name of the Outlook folder where you want your users' contacts to sync with Salesforce. Type the name of a common folder that exists in the Outlook directory for each of your users, at the same directory level as the Outlook default contacts folder. Folder names are case sensitive. If you type the name of a folder that doesn't exist at that level for each user, Salesforce creates the folder in Outlook for those users. To have Salesforce for Outlook sync with a nested Outlook folder, type a filepath, including backslashes (\).
   For example, to assign the Outlook folder "sfdc_sync_contacts" as a nested directory under your users' default Outlook contacts folder, type *`Contacts\sfdc_sync_contacts`* in the `Outlook folder for syncing contacts` text box,

where `Contacts` is your users' default contacts folder, and `sfdc_sync_contacts` is the folder where you want your users' Salesforce contacts to sync.



Contacts

Sync Direction: Sync both ways

Conflict Behavior: Salesforce always wins

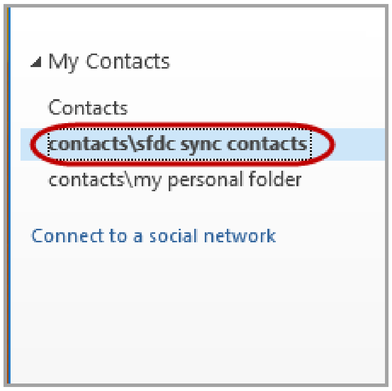
Edit Field Mappings

If an Outlook contact matches multiple Salesforce contacts, sync it with the Salesforce contact that:

● Has the most recent activity
○ Was last updated
○ Has the oldest creation date

Allow users to modify: ☐ Whether object is synced ☐ Sync direction ☐ Conflict behavior ☐ Field mappings ☐ Outlook folder for syncing contacts: Contacts\sfdc sync contacts

If the folder exists in your users' Outlook directories, Salesforce for Outlook syncs your contacts with it. If the folder doesn't exist, Salesforce for Outlook creates a folder at "Contacts\sfdc_sync_contacts."


My Contacts
Contacts
contacts\sfdc sync contacts
contacts\my personal folder
Connect to a social network

5. Click **Save**.
6. Instruct your users to save their Salesforce for Outlook settings again to confirm the changes that you've made to their systems. To do so, instruct your users to:
   a. In the settings wizard, right-click the Salesforce for Outlook icon () in their system tray, and then click **Settings**.
   b. Click **Next** from Review Your Sync Direction.
   c. Click **Next** from Control Which Outlook Items Sync.
   d. Click **Save** from Syncing Private Items.

   Salesforce for Outlook locates Outlook folders that exist in your users' Outlook directories or creates them for your users.
7. Instruct your users to move the Outlook contacts that they want to sync to the folder that you specified.

To change the Outlook folder locations where users sync events and tasks with Salesforce, repeat steps 3 through 7 in the events and tasks sections.

Define Advanced Settings for Salesforce for Outlook

Use advanced settings in a Salesforce for Outlook configuration to customize the default behavior of Salesforce for Outlook, such as setting the maximum size of the sync log. Click **Edit** to change the value of an advanced setting or **Remove** to remove it from the configuration.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
- "View Setup and Configuration"

To create, edit, or delete configurations:
- "Manage Email Client Configurations"

1. From Setup, enter `Outlook Configurations` in the `Quick Find` box, then select **Outlook Configurations**.
2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields.
3. Click **Add Advanced Setting** in the Advanced Settings section of an Outlook configuration.
4. Choose one of these settings and enter a value.

Advanced Setting	This setting indicates
HTTPTimeout	The number of seconds Salesforce for Outlook waits while trying to establish an HTTP connection with Salesforce. The value must be between 15 and 360 seconds, and the default is 30.
MaxLogFileSize	The maximum file size of the sync log you'll maintain. Value must be between 1 and 128 MB, and the default is 1.
MaxRetries	The number of times Salesforce for Outlook tries to connect to Salesforce. The value must be between 0 and 10, and the default is 3.

5. Click **OK**.
6. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

SEE ALSO:

Create Salesforce for Outlook Configurations

Outlook Configurations and Outlook Publisher Layouts

Define Data Sets for Salesforce for Outlook

Salesforce for Outlook Configurations for Contact Manager and Group Editions

Learn about sync settings that come with Salesforce Contact Manager and Group editions.

EDITIONS

Available to set up in: both Salesforce Classic and Lightning Experience

Available in: **Contact Manager** and **Group** Editions

The setting for	Is
Salesforce Side Panel	Enabled
Add Email	Enabled
Contacts	• Sync Direction—`Sync both ways` • Conflict Behavior—`Outlook always wins`

The setting for	Is

	- Filters
	`Contacts: User's Records`
	`Contacts on Accounts: User's Records`
	`Contacts in Chatter: Records User is Following`
	- Field Mapping—*`Default settings`*
	- Matching Criteria—`Most recent activity`

Events	- Sync Direction—*`Sync both ways`*
	- Conflict Behavior—*`Outlook always wins`*
	- Filters
	`User's Records`
	`Date greater or equal to LAST 30 DAYS`
	- Field Mapping—*`Default settings`*

Tasks	- Sync Direction—*`Sync both ways`*
	- Conflict Behavior—*`Salesforce always wins`*
	- Filters
	`User's Records`
	`Due date greater or equal to LAST 30 DAYS`
	- Field Mapping—*`Default settings`*

Set Up Users to Create Records Directly from the Salesforce Side Panel

USER PERMISSIONS

To display the Salesforce Side Panel:	"Side Panel" in Outlook configurations
To create actions and customize side panel publisher layouts:	"Customize Application"
To view side panel publisher layouts:	"View Setup"

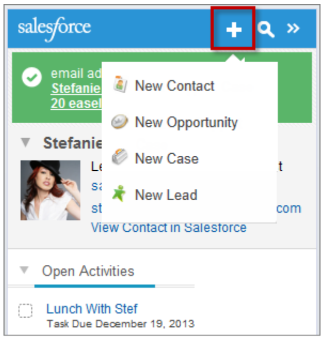
EDITIONS

This feature available to manage from: Salesforce Classic and Lightning Experience

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

If your users generate sales prospects while they're working in Microsoft® Outlook®, set them up to use the Salesforce Side Panel Publisher so they can create records directly from the side panel.

You can set up your Salesforce for Outlook users to create accounts, cases, leads, opportunities, and even custom objects directly from the side panel using the side panel publisher. Here's how it looks.



To set up your users to work with the side panel publisher, you'll create the quick actions that you want to appear in your users' publisher menus, add those quick actions to the appropriate publisher layouts, and assign the publisher layouts to the right users.

Your Salesforce edition determines which side panel features your users can access and how you'll set up your users to use the side panel publisher.

1. Verify that you've set up `Create a Record` global actions for each action you want to be available in your users' side panel publisher menus.
2. Add the actions to the appropriate publisher layout.
   - For Contact Manager or Group Editions, you'll add actions to your users' side panel publisher menus with the global publisher layout editor. If you're already using the global publisher layout for other Salesforce features, you'll notice that any actions you add for the side panel are displayed for all features. The side panel publisher, however, displays only actions with the action type `Create a Record`.
   - For Professional, Enterprise, Performance, Unlimited, or Developer Editions, you'll add actions to your users' side panel publisher menus with the side panel publisher layout editor. You can also create multiple side panel publisher layouts to give different users access to different side panel publisher menus.
3. Assign side panel publisher layouts to your users.
   - For Contact Manager or Group Editions, you'll assign your global publisher layout to user profiles to give users access.
   - For Professional, Enterprise, Performance, Unlimited, or Developer Editions, you'll assign your side panel publisher layout to user profiles to give users access.

SEE ALSO:

Create Quick Actions for the Salesforce Side Panel Publisher

Customize Side Panel Publisher Menu Layouts for Different Salesforce for Outlook Users

Assign Salesforce Side Panel Publisher Layouts to User Profiles

Create Quick Actions for the Salesforce Side Panel Publisher

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To set up global quick actions:
- "Customize Application"

To display the Salesforce Side Panel:
- "Side Panel" in Outlook configurations

Take the first step in preparing your Salesforce for Outlook users to create records directly from the Salesforce Side Panel. You'll set up `Create a Record` global quick actions for each kind of record you want to appear in users' Side Panel Publisher menus.

The Salesforce Side Panel Publisher is a menu that lets users create accounts, cases, contacts, leads, opportunities or custom objects records directly from the side panel. You'll choose which quick actions appear in users' side panel publisher menus by creating global `Create a Record` actions for each kind of record.

Note: You can use global actions for several types of publisher menus found in Salesforce, like the ones for the Home page or the Chatter tab. If you've already set up global `Create a Record` actions for the kinds of records you want available to your users, there's no need to set up the actions again—you'll find these actions already available to add to all publisher layouts.

If you haven't created global `Create a Record` actions for the kinds of records you want available to your users, you'll have to do so now.

1. From Setup, enter *`Global Actions`* in the `Quick Find` box, then select **Global Actions**.
2. Click **New Action**.
3. Select `Action Type`**Create a Record**.
   Only `Create a Record` actions appear in the side panel publisher menu.
4. Select a `Target Object` for the type of record you want available to users with this action.

   If the Target Object requires a `Record Type`, make sure that the users you'll assign to this action also have access to that record type.
5. Enter a `Label` for the new action that tells your users what it does.
6. Click **Save**.
7. From the Action Layout Editor, drag the fields you want to appear on the side panel publisher record detail page.

   If any of these fields are marked as required for this type of record elsewhere in your organization, make sure to include the fields in this action, too. This is because Salesforce won't let your users save records from the side panel publisher if the required fields aren't included in the record detail. The action layout editor displays red asterisks next to required fields.

After creating your `Create a Record` actions, the next step to setting up the side panel publisher for your users is to add your global actions to the appropriate side panel publisher layout. For Contact Manager or Group Editions, you'll add actions to your users' side panel publisher menus with the global publisher layout editor. For Professional, Enterprise, Performance, Unlimited, or Developer Editions, you'll add actions to your users' side panel publisher menus with the side panel publisher layout editor.

SEE ALSO:

Set Up Users to Create Records Directly from the Salesforce Side Panel

Customize Side Panel Publisher Menu Layouts for Different Salesforce for Outlook Users

Customize Side Panel Publisher Menu Layouts for Different Salesforce for Outlook Users

USER PERMISSIONS

To display the Salesforce Side Panel:	"Side Panel" in Outlook configurations
To view side panel publisher layouts:	"View Setup"

EDITIONS

This feature available to manage from: Salesforce Classic and Lightning Experience

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

Take the second step in preparing your Salesforce for Outlook users to create records directly from the Salesforce Side Panel. Set up different side panel publisher menus for specific users by customizing multiple publisher layouts with different sets of global quick actions.

Before you can customize side panel publisher layouts for your users, make sure you set up Create a Record global quick actions for each kind of record you want to appear in users' side panel publisher menus.

Some Salesforce editions let you create multiple publisher layouts so that users with different job responsibilities can have access to publisher menus with different sets of quick actions. This lets different types of users create only the records that apply to their job responsibilities. For example, sales representatives may need to create only contacts and opportunities, but sales managers may need to create contacts, opportunities, cases, and leads.

You can set up different side panel publisher menus for sales representatives and sales managers by customizing publisher layouts with specific sets of global actions for the different groups of users.

1. From Setup, enter `Outlook Configurations` in the `Quick Find` box, then select **Outlook Configurations**.
2. From the Outlook Publisher Layouts related list, click **New**. Give your new layout a name, and then click **Save**.
3. From the Outlook Configurations page, click **Edit** to add the global actions to your new layout.
4. From the Outlook Side Panel Publisher Layout Editor, drag the global actions you want to use into the Quick Actions in the Salesforce Classic Publisher section. For help using the publisher layout editor feature, see Add Actions to Global Publisher Layouts.

After you add actions to a publisher layout, the final step to setting up the side panel publisher for users is to give them access by assigning publisher layouts to the appropriate user profiles. For Contact Manager or Group Editions, you'll assign your global publisher layout to user profiles to give users access. For Professional, Enterprise, Performance, Unlimited, or Developer Editions, you'll assign your side panel publisher layout to user profiles to give users access.

SEE ALSO:

Set Up Users to Create Records Directly from the Salesforce Side Panel

Assign Salesforce Side Panel Publisher Layouts to User Profiles

Assign Salesforce Side Panel Publisher Layouts to User Profiles

Some Salesforce editions let you customize multiple side panel publisher menu layouts so that users with different job responsibilities can create different kinds of records directly from the Salesforce Side Panel. After you've created your layout, give your users access to the layout by assigning it to their user profiles.

For Contact Manager or Group Editions, you'll assign your global publisher layout to user profiles to give users access. For all other editions, you can assign Salesforce Side Panel Publisher Layouts by following these steps.

1. From Setup, enter *`Outlook Configurations`* in the `Quick Find` box, then select **Outlook Configurations**.
2. From the `Outlook Publisher Layouts` related list, click **Publisher Layout Assignment** > **Edit Assignment**.
3. Select a user profile by clicking anywhere on its row in the table.
4. From the Publisher Layout to Use drop-down, select the layout that you want to assign to the highlighted profile.
5. Click **Save**.

EDITIONS

This feature available to manage from: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To display the Salesforce Side Panel:

- "Side Panel" in Outlook configurations

To view side panel publisher layouts:

- "View Setup"

Define Data Sets for Salesforce for Outlook

Data sets are subsets of the Salesforce records that Salesforce for Outlook users can sync. They consist of filters that limit which records will sync. Each configuration must have a data set in order for users to sync with Outlook.

The Outlook Configuration detail page shows a summary of the configuration's current filters.

1. From Setup, enter *`Outlook Configurations`* in the `Quick Find` box, then select **Outlook Configurations**.
2. Click the name of an Outlook configuration.
3. In the Data Sets related list, click **Edit**.
4. Specify filters.
5. To see how many items will sync, you can check the data set size.
6. Click **Save**.

SEE ALSO:

Sample Exchange Sync and Salesforce for Outlook Data Sets

Salesforce for Outlook Contact Filters

Outlook Configurations and Outlook Publisher Layouts

Check the Size of Salesforce for Outlook Data Sets

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:

- "View Setup and Configuration"

To create, edit, or delete configurations:

- "Manage Email Client Configurations"

To create, edit, or delete data sets:

- Sync Direction can't be *`Don't sync`*

Learning about Data Sets for Salesforce for Outlook

Data sets are subsets of the Salesforce records that Salesforce for Outlook users can sync. They consist of filters that limit which records will sync.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
- "View Setup and Configuration"

To create, edit, or delete configurations:
- "Manage Email Client Configurations"

To create, edit, or delete data sets:
- Sync Direction can't be `Don't sync`

Knowing What Syncs

Salesforce for Outlook syncs records based on definitions in data sets, along with records related to them.

Understanding Limits to Data Sets

When using data sets, users can sync up to 5,000 records per filter between Microsoft® Outlook® and Salesforce at a time. This means that if users have more than 5,000 records to sync based on the configuration of their data sets, Salesforce for Outlook won't sync some of them. In addition, users may find that syncing these large quantities of records may slow down the sync process. You can, however, increase the limits for the number of records users can sync. Just keep in mind that you can't reduce the likelihood of the sync process slowing down.

Increasing Limits to Data Sets

If your users are working with more than 5,000 records, you can configure their data sets so that they can sync larger quantities of records. To do this, you'll their edit data sets to include additional filters. For example, under Filter By Record Ownership in the Contact Filters section, choose **Selected Contacts**. Then, choose **User's Records** under Contacts, Contacts on Opportunities, and Contacts on Accounts. Because the data set now has three filters, your users can now sync up to 15,000 contact records.

Keep in mind that these various filters you set up won't necessarily select records that are mutually exclusive. Therefore, the sync process might not sync exactly 15,000 records. To avoid this situation, you can further refine the group of contacts you want to sync. Just define additional parameters under Filter By Additional Objects and Fields.

After defining the filters, you can get a record count for your users in the Data Set Size section. To do so, enter a user, and then click **Get Record Count**. If your users still exceed sync limits for the filters you set up, you users may find that the sync process selects records in a random fashion.

About Person Accounts

If your organization enabled person accounts and your users have more than 5,000 records in Salesforce, data sets work in a different way. Specifically, Salesforce runs a query first on person accounts that match filter criteria, and then on contacts assigned to these accounts. So it's possible for the sync process to reach the 5,000 record limit (including person accounts and contacts) and not include some of the contacts your users would expect to sync.

SEE ALSO:

Configure Contact Filters for Salesforce for Outlook
Enter Event Filters for Exchange Sync andSalesforce for Outlook
Create Task Filters for Salesforce for Outlook
Check the Size of Salesforce for Outlook Data Sets

Configure Contact Filters for Salesforce for Outlook

USER PERMISSIONS

To view configurations:	"View Setup and Configuration"
To create, edit, or delete configurations:	"Manage Email Client Configurations"
To filter contacts by opportunity teams:	"Opportunity Team Selling"
To filter contacts by account teams:	"Account Teams"
To create, edit, or delete data sets:	Sync Direction can't be *Don't sync*

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

Data sets are subsets of the Salesforce records that Salesforce for Outlook users can sync. They consist of filters that limit which records will sync. For example, you may want to let certain users sync all contacts, but let other users sync only contacts related to their opportunity teams. In addition, you can filter by the fields in the records, such as letting users sync only contacts related to specific accounts and opportunities.

The Outlook Configuration detail page shows a summary of the configuration's current filters.

1. Define a data set for a configuration.
2. Under Filter By Record Ownership, specify the contacts users can sync.
3. If you choose **Selected Contacts**, you can further limit which contacts users sync.

For	To allow users to sync	Select
Contacts	All contacts that they own	`User's Records`
	All contacts they and their subordinates in the role hierarchy own	`User's Team's Records`
Contacts on Opportunities	Contacts related to their opportunities	`User's Records`
	Contacts related to opportunities that they and their subordinates in the role hierarchy own	`User's Team's Records`
	Contacts related to opportunities of which they are members of opportunity teams, but not opportunities that users own	`User's Opportunity Teams' Records`
Contacts on Accounts	Contacts related to their accounts	`User's Records`
	Contacts related to accounts they and their subordinates in the role hierarchy own	`User's Team's Records`
	Contacts related to accounts of which they are a team member, but not accounts that users own	`User's Account Teams' Records`

4. Under Filter By Additional Objects and Fields, add field-level filters you need.
   a. Select an object and a field within that object.
   b. Select the correct filter operator.

  c. Enter a value for the selected field.

5. To add a new filter, click **Add Row**; to delete the last one in the list, click **Remove Row**.
6. Under Other Contacts to Include, you can choose to have Chatter contacts automatically sync for users of this configuration. To do this, select `Sync contacts users follow in Chatter`.

SEE ALSO:

Salesforce for Outlook Contact Filters

Define Data Sets for Salesforce for Outlook

Check the Size of Salesforce for Outlook Data Sets

Sample Exchange Sync and Salesforce for Outlook Data Sets

Salesforce for Outlook Contact Filters

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

Contact filters control the number of records that Salesforce for Outlook users can sync between Outlook and Salesforce. Note the following when using contact filters.

- The criteria you specify are AND based. That is, if you specify more than one criterion, the result includes only records that match all of the criteria.
- If entering a date, use the format allowed by your `Locale` setting. You can also use special date values like TODAY, NEXT WEEK, NEXT YEAR, LAST <number> DAYS, and so on.
- Place quotation marks around numbers or other data that includes commas. For example *`Amount equals "10,000"`* returns records that have an amount of $10,000 but *`Amount equals 10,000`* returns $10,000 as well as $10 and $0.
- When you use the “less than,” "greater than,” “less or equal,” or “greater or equal” operators on fields that have numeric values, records with blank or “null” values are returned as if their value is zero (0).
- To limit results to records that are blank or contain “null” values for a particular field, choose the field and the “equals” or “not equal to” operators, leaving the third field blank. For example, *`Amount equals`* returns records with blank amount fields. You can search for blank values or other specified values at the same time. For example, *`Amount equals 1,,2`* returns records where the `Amount` is blank or contains the value “1” or “2”. For example, if you create a workflow a filter for accounts with the criteria *`Annual Revenue less than 100000`*, account records match if their `Annual Revenue` is blank.
- To search for phone numbers, include the exact phone number formatting or example, *`Phone starts with (561)`*.
- Separate search terms by commas to filter by more than one value. You can enter up to 80 characters, including commas and spaces. For example, to search for accounts in California, New York, or Washington, use *`State contains CA,NY,WA`*.
- When you filter on standard long text area fields, such as `Description`, only the first 1000 characters of the field are searched.
- You can use the **Get Record Count** button to check how many records will sync for a sample Salesforce for Outlook user based on the configuration's filters.
- If you need to reference user information in your contact filters, you can add the following merge fields to them.

Merge Field	Description
`$User.ID`	References the ID of the current user. This merge field can be applied to fields that contain a user lookup. The valid operators for this merge field are Equals and Not Equal To. When creating mobile view filters that reference an owner field, you can only use the `$User.ID` merge field.

Merge Field	Description
`$User.Username`	References the username of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.
`$User.Firstname`	References the first name of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.
`$User.Lastname`	References the last name of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.
`$User.Fullname`	References the first and last name of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.

SEE ALSO:

Configure Contact Filters for Salesforce for Outlook

Define Data Sets for Salesforce for Outlook

Check the Size of Salesforce for Outlook Data Sets

Enter Event Filters for Exchange Sync andSalesforce for Outlook

Data sets are subsets of the Salesforce records that Salesforce for Outlook users can sync. They consist of filters that limit which records will sync. For example, most users may sync only current and future events, while some users may need to also sync past events. Salesforce for Outlook syncs events based on their end dates rather than their start dates. For example, if you're syncing current and future events only, a two-day event that started yesterday still syncs.

The Data Sets section of the Outlook Configuration detail page shows a summary of the configuration's current event filters.

1. Define a data set for a configuration.
2. Under Events, enter one of these filters in the `Greater or equal to` field.
   - *`TODAY`*—Syncs events that end on or after today. The start time is 12:00 a.m.
   - *`LAST MONTH`*—Syncs events that ended on or after the first day of last month.
   - *`LAST N DAYS`*—Syncs events that ended on or after a specified number of days ago, such as *`LAST 30 DAYS`*.
3. You can use the **Get Record Count** button to check how many records will sync for a sample Salesforce for Outlook user based on the configuration's filters.
4. Save the data set.

Note: The following items don't sync: all-day events beginning on the first day you're configured to sync, and event attendees. Multiday events sync as single events in either direction. Multi-day events do sync.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
- "View Setup and Configuration"

To create, edit, or delete configurations:
- "Manage Email Client Configurations"

To create, edit, or delete data sets:
- Sync Direction can't be *`Don't sync`*

SEE ALSO:

Sample Exchange Sync and Salesforce for Outlook Data Sets

Check the Size of Salesforce for Outlook Data Sets

Create Task Filters for Salesforce for Outlook

Specify which tasks sync between Microsoft® Outlook® and Salesforce for your sales teams.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
- “View Setup and Configuration”

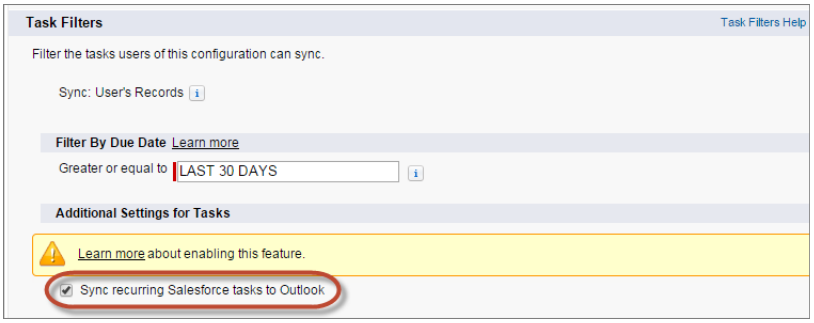
To create, edit, or delete configurations:
- “Manage Email Client Configurations”

To create, edit, or delete data sets:
- Sync Direction can’t be `Don’t sync`

Data sets are subsets of the Salesforce records that Salesforce for Outlook users can sync. They consist of filters that limit which records will sync. For example, most users may sync past-due tasks, while other users sync only current and future tasks. Salesforce for Outlook syncs tasks based on their due dates rather than their start dates. For example, if you're syncing current and future tasks only, a task that started yesterday still syncs.

The Data Sets section of the Outlook Configuration detail page shows a summary of the configuration's current task filters.

1. Define a data set for a configuration.
2. Under Tasks, enter one of these filters in the `Greater or equal to` field.
   - *`TODAY`*—Syncs tasks that are due on or after today. The start time is 12:00 a.m.
   - *`LAST MONTH`*—Syncs tasks that were due on or after the first day of last month.
   - *`LAST N DAYS`*—Syncs tasks that were due on or after a specified number of days ago, such as *`LAST 30 DAYS`*.
3. Choose whether recurring Salesforce tasks sync to Outlook.



Task Filters

Filter the tasks users of this configuration can sync.

Sync: User's Records

Filter By Due Date Learn more

Greater or equal to: LAST 30 DAYS

Additional Settings for Tasks

Learn more about enabling this feature.

☑ Sync recurring Salesforce tasks to Outlook

4. You can use the **Get Record Count** button to check how many records will sync for a sample Salesforce for Outlook user based on the configuration's filters.
5. Save the data set.

Note: Salesforce for Outlook doesn’t sync every kind of task. These kinds of tasks never sync:
- Recurring Outlook tasks to Salesforce
- Completed tasks, if marked as completed before Salesforce for Outlook syncs
- Tasks created automatically when you flag an email or contact for follow-up

SEE ALSO:

Outlook Configurations and Outlook Publisher Layouts

Sample Exchange Sync and Salesforce for Outlook Data Sets

Sample Exchange Sync and Salesforce for Outlook Data Sets

Because users with the same role usually have similar data sync requirements, many administrators create sync configurations based on the positions in their organization. Below are sample data sets for common Salesforce groups. Your Salesforce for Outlook and Exchange Sync users have unique needs, but you can use these examples as a reference to help you get started creating Outlook configurations (for Salesforce for Outlook users) and Exchange Sync configurations (for Exchange Sync users).

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

Sales Manager

Sales managers usually need to see records they own and the records of the users who report to them. In addition, they need to see the latest contact information for anyone associated with large deals in the pipeline and any upcoming meetings that might be related to these deals. They may also like to have their Chatter contacts in Outlook.

Sample Outlook Configuration for Sales Managers:

```
Contacts
 Contacts: User's Records, User's Team's Records
 Contacts on Opportunities: User's Team's Records
 Contacts on Accounts: User's Team's Records
 Contacts in Chatter: Records User is Following

Events
 Events: User's Records
  Date greater or equal TODAY
Tasks
 Tasks: User's Records
  Date greater or equal TODAY
```

Sales Engineer

Sales Engineers often only need the contacts owned by them and the other members of their opportunity teams. They may also want their Chatter contacts, a record of the past month's meetings, and a schedule of all future meetings.

Sample Outlook Configuration for Sales Engineers:

```
Contacts
 Contacts: User's Records
 Contacts on Opportunities: User's Opportunity Teams' Records
 Contacts in Chatter: Records User is Following

Events
 Events: User's Records
  Date greater or equal LAST MONTH

Tasks
 Tasks: User's Records
  Date greater or equal LAST MONTH
```

Account Executive

Account executives need to see contacts related to their accounts and opportunities. The opportunities are filtered so only contacts related to open opportunities with a probability over 40% sync. They'd also like to sync their Chatter contacts, all future meetings, and all meetings from the last two months.

Sample Outlook Configuration for Account Executives:

```
Contacts
 Contacts on Opportunities: User's Records
  (Probability (%) greater than 40) AND (Stage not equal to Closed Won,Closed Lost
 Contacts on Accounts: User's Records
 Contacts in Chatter: Records User is Following

Events
 Events: User's Records
  Date greater or equal LAST 60 DAYS

Tasks
 Tasks: User's Records
  Date greater or equal LAST 60 DAYS
```

SEE ALSO:

Define Data Sets for Salesforce for Outlook

Check the Size of Salesforce for Outlook Data Sets

You can use the **Get Record Count** button to check how many records will sync for a sample Salesforce for Outlook user based on the configuration's filters. If the numbers are too high or low, you can adjust the filters and check the size again. The maximum record count is 5000 per object.

1. Define a data set for a configuration.
2. Under Data Set Size, click the lookup icon next to the `User` field.
3. Select a user. To test maximum size, choose a user who owns a lot of records, even one who may not be currently assigned to the configuration.
4. Click **Get Record Count**. The number of records that would sync between Outlook and Salesforce for that user appear.
5. Adjust the filters or selected user and retest the data set as needed. Nothing is saved until you click **Save**.

SEE ALSO:

Define Data Sets for Salesforce for Outlook

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view Outlook data sets:

- "View Setup and Configuration"

To test Outlook data sets:

- "Manage Email Client Configurations"

Track the Versions of Salesforce for Outlook Your Users Run

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

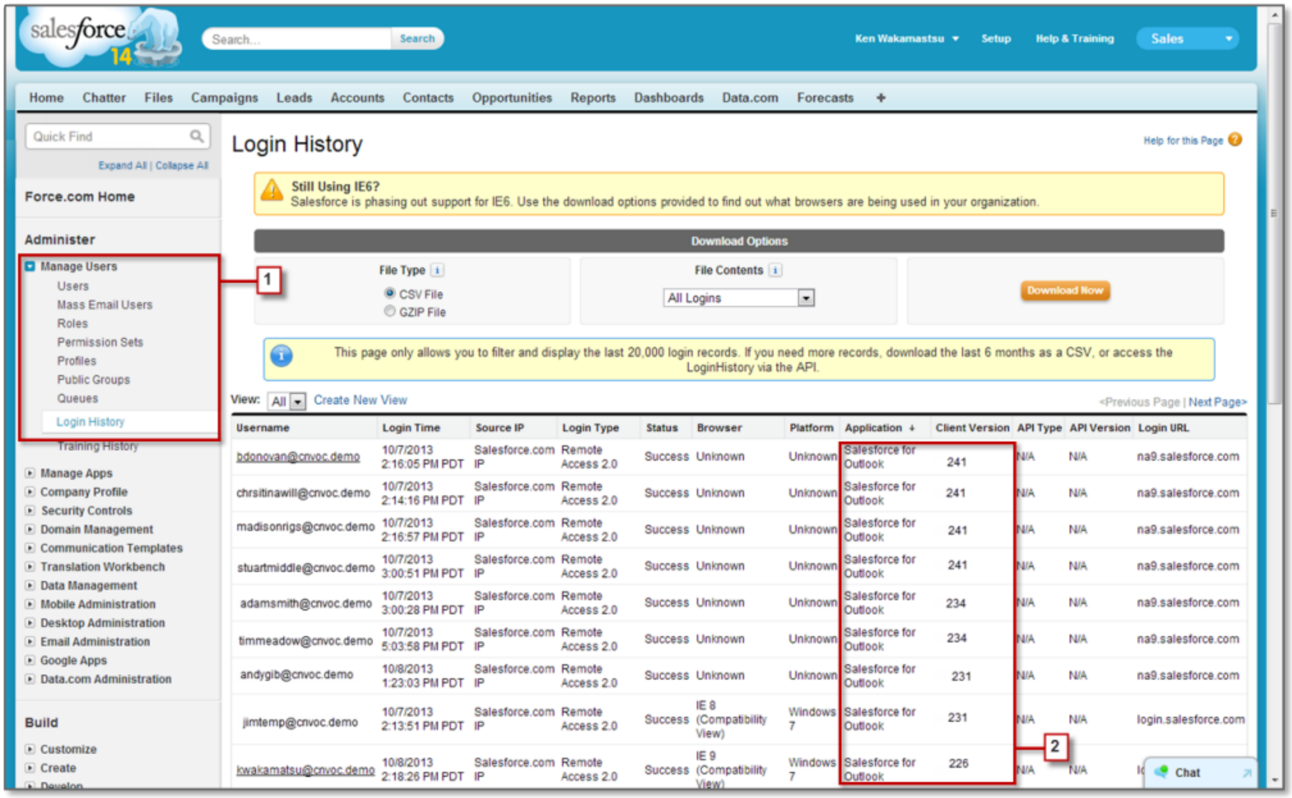
USER PERMISSIONS

To run reports:

- "Run Reports"

Quickly see which versions of Salesforce for Outlook your users are running from the Login History report.

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



Login History

Still Using IE6?
Salesforce is phasing out support for IE6. Use the download options provided to find out what browsers are being used in your organization.

File Type: ● CSV File ○ GZIP File

File Contents: All Logins

This page only allows you to filter and display the last 20,000 login records. If you need more records, download the last 6 months as a CSV, or access the LoginHistory via the API.

View: All

Username	Login Time	Source IP	Login Type	Status	Browser	Platform	Application	Client Version	API Type	API Version	Login URL
bdonovan@cnvoc.demo	10/7/2013 2:16:05 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	241	N/A	N/A	na9.salesforce.com
chrsitinawill@cnvoc.demo	10/7/2013 2:14:16 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	241	N/A	N/A	na9.salesforce.com
madisonrigs@cnvoc.demo	10/7/2013 2:16:57 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	241	N/A	N/A	na9.salesforce.com
stuartmiddle@cnvoc.demo	10/7/2013 3:00:51 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	241	N/A	N/A	na9.salesforce.com
adamsmith@cnvoc.demo	10/7/2013 3:00:28 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	234	N/A	N/A	na9.salesforce.com
timmeadow@cnvoc.demo	10/7/2013 5:03:58 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	234	N/A	N/A	na9.salesforce.com
andygib@cnvoc.demo	10/8/2013 1:23:03 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	231	N/A	N/A	na9.salesforce.com
jimtemp@cnvoc.demo	10/7/2013 2:13:51 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	IE 8 (Compatibility View)	Windows 7	Salesforce for Outlook	231	N/A	N/A	login.salesforce.com
kwakamatsu@cnvoc.demo	10/8/2013 2:18:26 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	IE 9 (Compatibility View)	Windows 7	Salesforce for Outlook	226	N/A	N/A	l

2. See each user's version of Salesforce for Outlook in the Application and Client Version columns.

Uninstalling Connect for Outlook

Connect for Outlook (Retired)

Before you get interested in our retired, legacy Connect for Outlook product, we urge you to explore either our cloud- or desktop-based Microsoft integration products: Salesforce App for Outlook or Salesforce for Outlook.

Important: Effective Winter '16, we retired Connect for Outlook. This means the product no longer saves your emails or syncs your contacts, events, and tasks between Microsoft® Outlook® and Salesforce.

But don't worry! Become even more productive when you migrate to either Salesforce App for Outlook or Salesforce for Outlook. Team up with your Salesforce administrator to determine which product is best for you and your colleagues.

SEE ALSO:

https://help.salesforce.com/HTViewSolution?id=000204943

How do I uninstall Connect for Outlook?

Which Microsoft® Email Integration Product is Right for My Company?

How do I uninstall Connect for Outlook?

Important: Effective Winter '16, we retired Connect for Outlook. This means the product no longer saves your emails or syncs your contacts, events, and tasks between Microsoft® Outlook® and Salesforce.

But don't worry! Become even more productive when you migrate to either Salesforce App for Outlook or Salesforce for Outlook. Team up with your Salesforce administrator to determine which product is best for you and your colleagues.

1. Close Microsoft® Outlook®.
2. In Windows®, open the Control Panel.
3. Select the option to uninstall programs.
4. Scroll to Salesforce Outlook Edition, and then follow the prompts to uninstall it.

SEE ALSO:

https://help.salesforce.com/HTViewSolution?id=000204943

Which Microsoft® Email Integration Product is Right for My Company?

Connect Offline

Desktop Client Access

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Connect Offline and Connect for Office are desktop clients that integrate Salesforce with your PC. As an administrator, you can control which desktop clients your users can access as well as whether users are automatically notified when updates are available. To set permissions for Salesforce for Outlook, use the “Manage Email Client Configurations” permission.

You can set users' access to desktop client by editing their profiles.

The desktop client access options are:

Option	Meaning
Off (access denied)	The respective client download page in users’ personal settings is hidden. Also, users can't log in from the client.
On, no updates	The respective client download page in users’ personal settings is hidden. Users can log in from the client but can't upgrade it from their current version.
On, updates w/o alerts	Users can download, log in from, and upgrade the client, but don't see alerts when a new version is made available.
On, updates w/alerts	Users can download, log in from, and upgrade the client. They can see update alerts, and can follow or ignore them.
On, must update w/alerts	Users can download, log in from, and upgrade the client. When a new version is available, they can see an update alert. They can't log in from the client until they have upgraded it.

Connect Offline is the only client available with Developer Edition. In Personal, Group, and Professional Editions, all users have the system default “On, updates w/o alerts” for all clients.

Note:

- Desktop client access is available only for users whose profiles have the “API Enabled” permission.

If users can see alerts and they have logged in to Salesforce from the client in the past, an alert banner automatically appears in the Home tab when a new version is available. Clicking the banner opens the Check for Updates page, where users can download and run installer files. From their personal settings, users can also access the **Check for Updates** page, regardless of whether an alert has occurred.

Install Connect Offline

Allocating Connect Offline Licenses

For organizations using Performance, Unlimited, Enterprise, and Developer Editions, Salesforce provides one Connect Offline license for each Salesforce license. Organizations using Professional Edition must purchase Connect Offline licenses separately. Users without a Connect Offline license can use for a 30-day trial period.

To allocate a Connect Offline license to a user within your organization, edit the user's record and select the `Offline User` checkbox. Users must have this checkbox selected to use Force.com Connect Offline.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available for an additional cost in: **Professional** Edition

USER PERMISSIONS

To view records in Connect Offline:

- "Read" on the appropriate type of record such as accounts, contacts, or opportunities

To update records in Connect Offline:

- "Create," "Edit," or "Delete" on the appropriate type of record such as accounts, contacts, or opportunities

Verifying System Requirements

The system requirements for Connect Offline are:

- Microsoft® Internet Explorer® 6, 7, or 8 (We don't support other browsers, including Mozilla® Firefox®, Apple® Safari®, and Google Chrome™.)
- Microsoft Windows® 2000, Windows XP, Windows Vista®, or Windows 7

  Note: The 32-bit version of Internet Explorer 8 with its Compatibility View option is required for the 64-bit version of these operating systems.

- 256 MB of RAM (512 MB recommended)
- 20 MB of disk space minimum (250 MB recommended depending on the size of the briefcase)
- Intel® Pentium® II processor, 500 MHz or above

Installing an Individual Client

To download and install the Connect Offline client:

1. From your personal settings, enter *`Connect Offline`* in the `Quick Find` box, then select **Connect Offline**.
2. Click **Install Now**.

   Note: You must have administrator privileges on the computer on which you install Connect Offline.

3. Click **Yes** when prompted to install and run the client.
4. Follow the prompts in the setup wizard to complete the installation.
5. Log in to Connect Offline to verify the installation.

Deploying Connect Offline System-Wide

If your organization uses Windows, network administrators can install Connect Offline on several machines at once. For mass deployments, go to the Connect Offline page in your personal settings and click the link to download the zipped MSI package.

Tip: The login history lists the version of Connect Offline that each user is using.

Updating Connect Offline

Salesforce periodically releases Connect Offline updates and notifies users according to settings in their user profiles.

Sample Offline Data Sets

Many administrators create briefcase configurations based on the functional groups in their organization because users in the same group usually have similar offline requirements for data. Below are sample data sets for common Salesforce groups. Your Connect Offline users have unique needs, but you can use the examples as a reference to help you get started with data sets in briefcase configurations.

Sales Manager

Sales managers usually need to see records they own and also the records of their subordinates. They also tend to closely monitor large deals in the pipeline.

This briefcase configuration allows sales managers to see:

- The opportunities they own
- The opportunities owned by users who report to them in the role hierarchy
- All opportunities scheduled to close in the current quarter with an amount greater than $100,000
- All accounts related to the opportunities
- A subset of their contact and activity records

Sales Engineer

The sales engineer briefcase configuration retrieves opportunities owned by the other members of the user's opportunity team, but does not include the user's records. The sales engineer briefcase configuration is opportunity-based because all accounts and contacts included in the briefcase are related to the opportunities. The sales engineers would see:

- Up to 5000 opportunities they own and up to 5000 opportunities that list them on the opportunity team. These opportunities must be either open or have a close date in the current month, the past two months, or up to 24 months in the future. If more than 5000 opportunities exist, the 5000 most recently modified records are synchronized.
- All accounts, contacts, and opportunity products related to those opportunities
- A subset of tasks and events related to those opportunities

Account Executive

The account executive briefcase configuration is account-based, which means the briefcase includes the user's accounts and opportunities related to those accounts. The opportunities are filtered so that only open opportunities scheduled to close in the current quarter are synchronized. The Task and Event child data sets retrieve all activities related to those opportunities, not just the user's activities. Only open tasks and events from a two-month window are sent to the briefcase. The Task and Event parent data sets pull down just the user's activities and restrict the activities to open tasks and events scheduled for the next 30 days. The Contact data set delivers the user's contact records, but limits the record count to the 500 most recently active contacts.

Monitoring Email

What Are Email Logs?

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To access email logs:
- "Modify All Data"

Email logs are CSV files that contain information about all email sent through Salesforce over the last 30 days. Logs contain data such as:

- The email address of each email sender and recipient
- The date and time each email was sent
- The delivery status of each email
- Any error code associated with each email

You can use email logs to troubleshoot encountered errors.

To manage email logs, from Setup, enter *`Email Log Files`* in the `Quick Find` box, then select **Email Log Files**.

- To request a new email log, click **Request an Email Log**. Due to the volume of email processed through Salesforce, requests are queued in the order that they are received. Email logs should be available within 30 minutes of your request.
- The pending email log requests list provides the status on email log requests that have not yet completed. You can have a maximum of three pending log requests at any time.
- The email log errors list provides descriptions for requests that failed.
  - To resubmit a request that failed, click **Resubmit**.
  - To delete a request that failed, click **Del**.

  Warning: You cannot resubmit a failed request if it requires data that has exceeded the 30 day limit, or if you already have three pending requests.

- To download an email log, click **Download (.zip)**. Email logs are CSV files contained within a compressed file that contains a maximum of 100,000 records. Since email log requests return up to 500,000 records, there may be up to five .zip files to download. Logs contribute to your overall file storage limits.
- To delete an email log, click **Del**.

For a summary of the information returned from an email log, see Viewing Email Logs on page 356.

Requesting an Email Log

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To access email logs:
- "Modify All Data"

To request a new email log for your organization:

1. From Setup, enter *`Email Log Files`* in the `Quick Find` box, then select **Email Log Files**.
2. Click **Request an Email Log**.

   You can have a maximum of three pending log requests at one time. If you already have three pending requests, you cannot request another log until at least one of those requests completes.

3. Enter a `Start Time` and `End Time` range for the email log you want to retrieve. Email logs are available for messages sent within the past 30 days prior to your request.

   Note: Each email log can span a maximum of seven days. To see email log data from a period of time greater than seven days, create multiple requests.

4. Optionally, you can filter an email log to only include rows where a specific domain name or email address appears in a field, such as `Recipient` or `Message ID Header`. To enter more than one filter term, separate each value with a comma. If you leave this field blank, the log is not filtered and all email addresses are returned within the specified time range.
5. Enter the email addresses that you want to receive notification when the email log request is complete. Separate each email address with a comma.

To clear a request and return to the email log overview page, click **Cancel**.

SEE ALSO:

Viewing Email Logs

Viewing Email Logs

The following table describes the format of the log file and lists examples of its fields:

Column	Field	Description	Example
A	`Date/Time`	The date and time the message was sent in GMT	3/06/2009 13:37
B	`Internal Message ID`	The unique internal ID of the message	16/A4-20983-88E21E84
C	`Mail Event`	Indicates the final email event in the mail server. Events can be one of the following values: **R - Reception** The email was successfully received. **D - Delivery** The email was successfully sent. **T - Transient Failure** The email transmission was delayed. Salesforce will retry delivery over a 24-hour period. The first retry occurs five minutes after the first transient failure, the second occurs ten minutes after that, the third	T

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To access email logs:
- "Modify All Data"

Column	Field	Description	Example
		twenty minutes after that, and so on. **P - Permanent Failure** The email could not be delivered.	
D	`Recipient`	The email address of the person to whom the email is sent	admin@acme.com
E	`Sender`	The email address of the person who sent the email	user@acme.com
F	`Remote Host`	The IP address of the application server that delivered the email to the email server	10.0.0.1
G	`Bytes Transferred`	The size of the email	11856
H	`User ID`	The Salesforce ID of the user who sent the email	`00540000000rSXT`
I	`Message ID Header`	The ID header at the beginning of every email	`21749386.1060912240277050 44.JavaMail.sfdc@na2-app4-2-sjl.ops.sfdc.net`
J	`Retry Count`	The number of attempts made to deliver the email	11
K	`Seconds in Queue`	The number of seconds the email had to wait before being delivered	300
L	`Delivery Stage`	The final stage the delivery was in before it was logged. Below are the values of the stages in the order that they appear during the SMTP sequence: **BANNER** The SMTP connection response **EHLO** The beginning of the session with the mail server **STARTTLS** Establishes a secure communication session with the email server	`during RCPT TO`

Column	Field	Description	Example
		MAIL FROM Announces the sender of the email **RCPT TO** Announces the recipient of the email **DATA** Announces that the subsequent text is the email message **BODY** The state when the body of the email is being sent to the recipient **RSET** Resets the server state, ending the session In addition, there are responses that may appear at any point during the delivery sequence: **while not connected** The client is trying to establish a connection **while idle** The client has connected, but is not sending or receiving any commands **reading confirmation** A command was sent and the client is waiting for a response **handshaking TLS** An error occurred while trying to establish a secure connection **out of band bounce** The receiving server accepted a command, but then for an unknown reason rejected it **in unknown state** An unknown error has occurred	

Column	Field	Description	Example
M	`Relay Address`	The hostname of the designated relay system	relay.my.org
N	`Relay Port`	The port of the designated relay system	587

Column	Field	Description	Example
O	`Delivery Status Notification`	After every delivery stage, a three-digit response code is sent from the mail server. The first number indicates whether the command was successful or unsuccessful; the second digit indicates the type of error; and the third provides additional information to resolve the potential problem. The five possible values of the first digit are: **`1xx` - Positive Preliminary reply** The command was accepted, but no response has been sent **`2xx` - Positive Completion reply** The requested action has successfully completed **`3xx` - Positive Intermediate reply** The command was accepted, but the requested action needs more information **`4xx` - Transient Negative Completion reply** The command was not accepted and the requested action did not occur. However, the error condition is temporary and the action may be requested again. **`5xx` - Permanent Negative Completion reply** The command was not accepted and the requested action did not occur Every email service provider implements the codes differently, so there is no comprehensive list for what the second or third digits indicate.	`421 no adequate servers`

Column	Field	Description	Example
		For more information on these codes, view the official SMTP documentation, section 4.2.1: http://www.ietf.org/rfc/rfc2821.txt?number=2821	

SEE ALSO:

What Are Email Logs?

Troubleshoot with Inbound Email Snapshots

Take a snapshot of inbound email messages so you can more easily troubleshoot inbound email errors.

Inbound email snapshots capture a copy of inbound email messages, helping you diagnose issues with email services such as Email to Salesforce, Email-to-Case, and Apex email services. Request a snapshot by specifying criteria for the email's To and From addresses, and when an inbound message meets that criteria, the snapshot records a single copy that you can view and download. The email itself is processed normally without alteration. Snapshots contain the:

- Sender's address
- Inbound email service address
- Date and time of the snapshot
- Full message contents, including headers and attachments

To enable inbound email snapshots, contact Salesforce.

- To access inbound email, from Setup, enter `Email Snapshots` in the `Quick Find` box, then select **Email Snapshots**.
- To request an inbound email snapshot, enter criteria for the To address (required) and From address (optional). Then click **Request Snapshot**.
  The requested snapshot is added to the list of Pending and Completed Snapshots. When an inbound message meets your specified criteria, we take a snapshot and complete the request.
- To view a completed snapshot:

Option	Description
View snapshot details	Click **Show Details** to see when the snapshot was taken, the sender's address, and the inbound email service address. Click **Hide Details** to collapse the details section.
Download the snapshot	Click **Download** then either open the email as a .txt file or save it to your computer.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To request, view, download, and delete email snapshots:

- "Modify All Data"

Consider these tips when using inbound email snapshots:

- You can have a maximum combined total of 25 pending and completed snapshots. Delete some to free up space for new snapshots. You can delete any pending or completed snapshot, even if someone else originally requested it.
- Deleted snapshots are permanently deleted. They're not moved to the Recycle Bin.
- When specifying criteria for the To address, keep these tips in mind.
  - The criteria apply to any of the addresses specified in an email's To, CC, or BCC fields (not only the To field).
  - Inbound email service addresses always end in `salesforce.com`.
  - You may want to look up the addresses your organization uses. This table summarizes where to find them.

Type of inbound email address	Where to find addresses
The user's unique Email to Salesforce address	From the user's personal settings, enter `Email to Salesforce` in the `Quick Find` box, then select **Email to Salesforce** to view the unique address assigned to them by Email to Salesforce.
Email routing addresses for Email-to-Case or On-Demand Email-to-Case	From Setup, enter `Email-to-Case` in the `Quick Find` box, then select **Email-to-Case** to open the Email-to-Case settings page. View the Routing Addresses section.
Your organization's email service addresses	From Setup, enter `Email Services` in the `Quick Find` box, then select **Email Services**, then the name of an email service.

- You can use an asterisk (*) wildcard in both the local-part of the email address (the part before the @ symbol) and in the domain-part (the part after the @ symbol). Spaces, commas, and semicolons aren't valid characters. Each address field can contain a maximum of 255 characters.
- If you want to request more than one snapshot with identical criteria, click **Request Snapshot** multiple times.
- If you believe that a snapshot should have completed but it still shows Pending status, try refreshing the page.
- Snapshots don't expire. If no inbound emails match the specified criteria, a requested snapshot remains in Pending status indefinitely. Completed snapshots persist until you delete them.

Set Up Work.com

Work.com Implementation Overview

EDITIONS

Available in: Salesforce Classic

Work.com is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

Work.com is a suite of sales-management and service-management tools that help managers and teams learn faster and perform better.

Work.com has various features to help your sales and service teams. This includes recognition tied to real rewards, detailed goals and real-time coaching, and full-featured performance reviews.

After you receive your Work.com licenses, you'll need to set up Work.com by performing the following activities.

- Assign a Work.com administrator to complete the setup process.
- Enable preferences for Work.com features.
- Set up permissions to Work.com features with profiles or permission sets.
- Assign Work.com licenses to users.
- Configure Work.com features for your organization.

SEE ALSO:

Prerequisites
Assign a Work.com Administrator
Enable Work.com Features
Work.com Feature Access
Work.com License Types
Work.com Feature Overview

Prerequisites

USER PERMISSIONS

To enable Work.com features:	"Customize Application"
To assign permission sets:	"Assign Permission Sets"
To assign profiles:	"Manage Users"
To set field-level security:	"Manage Profiles and Permission Sets" AND "Customize Application"
To view the Calibration tab:	"Enable Work.com Calibration"

EDITIONS

Available in: Salesforce Classic

Work.com is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

Plan out your implementation before enabling Work.com in your organization.

Before beginning the implementation process, Salesforce must enable Work.com permissions and provision Work.com licenses for your organization. Your Salesforce contact will coordinate this with you, but you can check if your organization has available Work.com licenses. In Setup, enter `Company Information` in the `Quick Find` box, then select **Company Information**, and check for Work.com User under **Feature Licenses**.

Note: It is recommended that you enable Chatter regardless of the edition your organization is using. Many Work.com features use the Chatter feed to notify and interact with users. To confirm Chatter is enabled, from Setup, enter `Chatter Settings` in the `Quick Find` box, then select **Chatter Settings**, and verify that Chatter Settings is enabled.

SEE ALSO:

Assign a Work.com Administrator

Enable Work.com

Assign a Work.com Administrator

Before enabling Work.com in your organization, you must assign a Work.com user feature license to the person who will be the system administrator and responsible for setting up Work.com for your organization.

If you're the administrator setting up Work.com, assign the license to yourself.

1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
2. Find the name of the person who will be the system administrator and click **Edit** next to their name.
3. In the right-hand column, select the **Work.com User** checkbox.
4. Click **Save**.

We strongly recommend that you create a separate Work.com Administrator profile with limited access because the standard Salesforce System Administrator profile is so powerful.

SEE ALSO:

Enable Work.com Features

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign a Work.com administrator:

- "Customize Application"

Enable Work.com Features

Administrators can enable preferences for Work.com features on the Work.com Settings page.

All the settings except for Thanks Settings and Skills Settings require a Work.com license.

1. From Setup, enter `Work.com Settings` in the `Quick Find` box, then select **Work.com Settings**.
2. Select the Work.com features you want to enable:

   For users that purchased Work.com prior to the Spring '15 release, the features that appear differ depending on whether you have add-on licenses to **Work.com Motivate, Work.com Align**, or **Work.com Perform**.

Feature	Section	Description
Enable Thanks	**Thanks Settings**	Enable Thanks to allow users to recognize others with thanks badges on the Chatter feed. If you disable this setting, users no longer see the Thanks action in the Chatter publisher. However, they can still see previously created Thanks posts.
Restrict Custom Badge Creators	**Thanks Settings**	By default, all users can create custom badges. This setting restricts badge creation to users that have the "Create" permission on the Reward object.
Enable Rewards	**Recognition Settings**	Enable Rewards to tie tangible rewards to badges. Reward creators can upload gift codes to create Reward funds. See the "Reward Funds" topic for more information about creating rewards.
Enable Manager Groups for Coaching	**Coaching Settings**	Enable manager groups to give managers access to the coaching spaces of the users that report to them. To enable this setting, the Manager Groups setting must first be enabled in Setup, under **Sharing Settings**.
Enable Manager Groups for Goals	**Goal Settings**	Enable manager groups to give managers access to the goals of the users that report to them. To enable this setting, the Manager Groups setting must first be enabled in Setup, under **Sharing Settings**.
Enable Calibration	**Perform Settings**	Enable Calibration to see and update performance across teams and individuals. Note: For **Performance Edition** organizations, Calibration is not available for the following profiles: Contract

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable Work.com features:

- "Customize Application"

Feature	Section	Description
		Manager, Marketing User, Read Only, and Solution Manager.
Enable Skills	**Skills Settings**	Enable Skills to allow users to add skills to their profiles and endorse the skills of other users. Enabling this setting replaces the Knowledgeable About widget on Chatter profiles.
Restrict Skill and Endorsement Editing to Record Detail Pages	**Skills Settings**	Disables inline editing of skills and endorsements on Chatter profiles, and restricts editing to record detail pages. Recommended if you have customized these objects with custom required fields. Note: Don't enable this setting if you want to use skills in Chatter profiles.
Enable Automatic Skill Feed Posts	**Skills Settings**	Enable to automatically create Chatter feed posts when a user adds a new skill.
Enable Suggested Skills	**Skills Settings**	Enable Suggested Skills to have the skills widget suggest skills for users to add based on their Chatter Topics activity.

3. Click **Save**.

SEE ALSO:

Work.com Feature Access

Work.com Feature Access

Once Work.com is enabled for your organization, grant users access to Work.com features using either profiles or permission sets.

Administrators can grant users access to Work.com features with either profiles or permission sets.

Note: Professional Edition organizations will need to grant access through existing profiles.

- A profile contains user permissions and access settings that control what users can do within their organization. Each user can only have one profile. Refer to Recommended Work.com Profiles for more information about creating profiles.
- A permission set is a collection of settings and permissions that gives users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Refer to Recommended Work.com Permission Sets for more information about creating the proper permission sets.

EDITIONS

Available in: Salesforce Classic

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

If your organization has provisioned Work.com Only user licenses, they come with a standard Work.com Only profile. Keep in mind that you can't modify the standard profile, but you can clone it and modify the cloned profile.

SEE ALSO:

Recommended Work.com Permission Sets

Assign Work.com Permission Sets

Recommended Work.com Profiles

Assign Work.com Profiles

Work.com License Types

Assign Work.com Permission Sets

Assign permission sets with Work.com access to your users from Setup.

Before you can assign permission sets to your users, you must create permission sets with Work.com access. Refer to Recommended Work.com Permission Sets for more information.

1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
2. Select a user.
3. In the Permission Set Assignments related list, click **Edit Assignments**.
4. To assign a permission set, select it from the Available Permission Sets box and click **Add**. To remove a permission set assignment, select it from the Enabled Permission Sets box and click **Remove**.

   Note:

   - The Permission Set Assignments page shows permission sets with no associated license and permission sets that match the user's license. For example, if a user's license is Chatter Only, you can assign permission sets with the Chatter Only license and permission sets with no associated license to that user.

     If you assign a permission set with no associated user license, all of its enabled settings and permissions must be allowed by the user's license, or the assignment will fail.

   - Some permissions require users to have *permission set licenses* before the user can have those permissions. For example, if you add the "Use Identity Connect" permission to the "Identity" permission set, only users with the Identity Connect permission set license can be assigned the "Identity" permission set.

5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign permission sets:

- "Assign Permission Sets"

Assign Work.com Profiles

Assign profiles with Work.com access to your users from Setup.

Before you can assign profiles to your users, you must create profiles with Work.com access. Refer to Recommended Work.com Profiles for more information.

1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
2. Click **Edit** next to a user.
3. From the **Profile** drop-down, select the profile you would like to assign.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign profiles:

- "Manage Users"

Work.com License Types

After granting access to Work.com features with permission sets or profiles, assign users a Work.com license.

Work.com has two types of licenses.

- Work.com Only user licenses are for users who don't have a Salesforce license and will only use the Work.com features in your organization.

  Note: Work.com Only user licenses have limited administrator functionality. Assign Work.com User Feature licenses instead for users who will be administering performance summary cycles or other Work.com features.

- Work.com User Feature licenses are for users who also have a Salesforce license.

You may want to configure Work.com features before assigning licenses to all users. For example, you may want to initially limit licenses to Work.com administrators to avoid exposing certain features prior to your launch date.

EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

Assign Work.com Only User Licenses

Assign Work.com User Feature Licenses

Work.com Feature Overview

Assign Work.com Only User Licenses

Assign a Work.com Only license to users who don't have a Salesforce license and will only use Work.com.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign user licenses:
- "Manage Users"

Work.com Only user licenses have limited administrator functionality. Assign Work.com User Feature licenses instead for users who will be administering performance summary cycles or other Work.com features.

1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
2. Click **Edit** next to a user.
3. From the **User License** drop-down, select **Work.com Only**.
4. Click **Save**.

SEE ALSO:

Work.com License Types

Assign Work.com User Feature Licenses

Assign Work.com User Feature Licenses

Assign a Work.com User Feature license to users who also have a Salesforce license.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign user feature licenses:
- "Manage Users"

1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
2. Click **Edit** next to a user.
3. In the right-hand column, select the **Work.com User** checkbox.
4. Click **Save**.

SEE ALSO:

Work.com License Types

Assign Work.com Only User Licenses

Configure Work.com Features

Work.com Feature Overview

Most Work.com features require the Work.com add-on, but some are freely available to Sales Cloud users.

EDITIONS

Available in: Salesforce Classic

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

Users can access the Skills and Thanks features (excluding Rewards) without Work.com. Other features require the Work.com add-on.

Table 8: Work.com Features Available

Feature	Requires Work.com Add-On
Recognition: Create and give thanks badges	
Recognition: Create and give rewards badges	✓
Skills: Share and endorse skills	
Goals: Define and track your work	✓
Coaching: Give real-time coaching	✓
Feedback: Give and offer feedback	✓
Performance: Track performance data	✓
Calibration: Visualize and change performance data	✓

Note: It is recommended that you enable Chatter regardless of the edition your organization is using. Many Work.com features use the Chatter feed to notify and interact with users. To confirm Chatter is enabled, from Setup, enter *`Chatter Settings`* in the `Quick Find` box, then select **Chatter Settings**, and verify that Chatter Settings is enabled.

You can customize where different tabs, such as Goals and Feedback, appear within the Work.com app and on user profiles. From Setup, enter *`Apps`* in the `Quick Find` box, then select **Apps** and make changes to the desired apps and subtab apps. For more information, see Editing App Properties or Managing Subtab Apps in the Salesforce Help.

SEE ALSO:

- Work.com Implementation Overview
- Thanks and Skills Features
- Goals and Coaching Features
- Performance Summary and Calibration Features
- Work.com Report and Dashboard Overview

Thanks and Skills Features

EDITIONS

Available in: Salesforce Classic

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

Set up Thanks and Skills features by configuring thanks in the Chatter publisher and assigning a publisher layout to profiles.

Make sure you've enabled the desired Thanks and Recognition features prior to configuring them. From Setup, enter "Work.com Settings" in the `Quick Find` box, then select **Work.com Settings** and enable the relevant settings.

For detailed information about creating rewards, refer to Reward Funds in the Salesforce Help. Additionally, information about customizing skills can be found in the Skills Customization topic.

SEE ALSO:

- Work.com Feature Overview
- Configure Thanks in the Chatter Publisher and Salesforce1 Action Bar
- Assign Publisher Layout to Profiles

Configure Thanks in the Chatter Publisher and Salesforce1 Action Bar

You can change the position of the Thanks action in the Chatter publisher and the Salesforce1 action bar, or even hide Thanks for specific profiles.

To modify the Chatter publisher, actions in the publisher must be enabled.

1. From Setup, enter `Chatter Settings` in the `Quick Find` box, then select **Chatter Settings**.
2. Confirm that `Enable Actions in the Publisher` is selected in the Actions in the Publisher section. If it isn't enabled, click **Edit**, select `Enable Actions in the Publisher`, and click **Save**.
3. From Setup, enter `Publisher Layouts` in the `Quick Find` box, then select **Publisher Layouts**.
4. Click **Edit** next to the Global Publisher Layout.
5. Drag the **Thanks** action to where you want it to appear in the Chatter publisher or the Salesforce1 action bar.
6. Click **Save**.

You can hide Thanks for specific users by changing profile visibility settings.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up actions:
- "Customize Application"

SEE ALSO:

Thanks and Skills Features

Assign Publisher Layout to Profiles

Assign Publisher Layout to Profiles

Assign the publisher layout with Thanks to user profiles. People with these profiles can thank their coworkers directly from the publisher.

If not everyone in your organization should have this feature, create another layout without Thanks and assign it to a profile. People with that profile won't see Thanks in their publisher.

1. From Setup, enter `Publisher Layouts` in the `Quick Find` box, then select **Publisher Layouts**.
2. Click **Publisher Layout Assignment**.
3. Click **Edit Assignment**.
4. Select a user profile by clicking anywhere on its row in the table.

   You can assign a global publisher layout to multiple profiles by using SHIFT+click to select adjacent profiles and CTRL+click to select non-adjacent profiles.
5. From the Publisher Layout to Use drop-down, select the global publisher layout that you want to assign to the highlighted profile.
6. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up quick actions:
- "Customize Application"

SEE ALSO:

Thanks and Skills Features

Configure Thanks in the Chatter Publisher and Salesforce1 Action Bar

Goals and Coaching Features

Enable feed and history tracking to further track goals and coaching.

Note: Enable Chatter in your organization before configuring Goals and Coaching features.

Feed tracking lets users see Chatter feed updates for any relevant changes. History tracking lets you track changes to critical fields. We recommend that you track changes for Goal, Metric, and Coaching objects.

Surface key company goals to give all employees visibility into company-wide goals.

EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

- Work.com Feature Overview
- Enable Feed Tracking for Goals
- Enable Feed Tracking for Coaching
- Enable Feed Tracking for Metrics
- Enable History Tracking for Goal Fields
- Enable History Tracking for Coaching Fields
- Enable History Tracking for Metric Fields
- Configure Key Company Goals

Enable Feed Tracking for Goals

Track updates for goals so users can receive notifications about important changes.

Determine which goal updates should notify people and select the associated fields for tracking.

1. From Setup, enter `Feed Tracking` in the `Quick Find` box, then select **Feed Tracking**.
2. Click on the Goal object.
3. Click the **Enable Feed Tracking** checkbox.
4. Select the fields you would like to track.

   Tip: For goals, it's helpful to track Completion Date, Due Date, Owner Name, Progress, and All Related Objects.

5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize fields tracked in feeds:
- "Customize Application"

SEE ALSO:

- Goals and Coaching Features
- Enable Feed Tracking for Coaching
- Enable History Tracking for Goal Fields
- Enable History Tracking for Coaching Fields
- Configure Key Company Goals

Enable Feed Tracking for Coaching

Track updates for coaching spaces, so users can receive notifications about important changes.

Determine which coaching updates should notify people and select the associated fields for tracking.

1. From Setup, enter `Feed Tracking` in the `Quick Find` box, then select **Feed Tracking**.
2. Click on the Coaching object.
3. Click the **Enable Feed Tracking** checkbox.
4. Select the fields you would like to track.

   Tip: For coaching, it's helpful to track Inactive and All Related Objects.

5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize fields tracked in feeds:

- "Customize Application"

SEE ALSO:

Goals and Coaching Features

Enable Feed Tracking for Goals

Enable History Tracking for Goal Fields

Enable History Tracking for Coaching Fields

Configure Key Company Goals

Enable Feed Tracking for Metrics

Track updates for goals so users can receive notifications about important changes.

Determine which metric updates should notify people and select the associated fields for tracking.

1. From Setup, enter `Feed Tracking` in the `Quick Find` box, then select **Feed Tracking**.
2. Click on the Metric object.
3. Click the **Enable Feed Tracking** checkbox.
4. Select the fields you would like to track.

   Tip: For metrics, it's helpful to track Comment, Completion Date, Current Value, Due Date, Goal, Initial Value, Owner Name, Status, Target Value, and All Related Objects.

5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize fields tracked in feeds:

- "Customize Application"

SEE ALSO:

Goals and Coaching Features

Enable History Tracking for Goal Fields

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up which fields are tracked:

- "Customize Application"

Track changes to the Goal object for auditing purposes.

We recommend tracking the Completion Date, Due Date, Owner Name, Progress, Start Date, Status, and Description fields.

1. From the object management settings for goals, go to the fields area.
2. Click **Set History Tracking**.
3. Select up to 20 fields to track.
4. Click **Save**.

SEE ALSO:

Goals and Coaching Features
Enable Feed Tracking for Goals
Enable Feed Tracking for Coaching
Enable History Tracking for Coaching Fields
Configure Key Company Goals

Enable History Tracking for Coaching Fields

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up which fields are tracked:

- "Customize Application"

Track changes to the Coaching object for auditing purposes.

We recommend tracking the Coach, Inactive, Owner Name, and Person Coached fields.

1. From the object management settings for goals, go to the fields area.
2. Click **Set History Tracking**.
3. Select up to 20 fields to track.
4. Click **Save**.

SEE ALSO:

Goals and Coaching Features
Enable Feed Tracking for Goals
Enable Feed Tracking for Coaching
Enable History Tracking for Goal Fields
Configure Key Company Goals

Enable History Tracking for Metric Fields

Track changes to the Metric object for auditing purposes.

We recommend tracking the Comment, Completion Date, Current Value, Due Date, Goal, Initial Value, Owner Name, Status, Target Value, Weight, and Description fields.

1. From the object management settings for metrics, go to the fields area.
2. Click **Set History Tracking**.
3. Select up to 20 fields to track.
4. Click **Save**.

SEE ALSO:

Goals and Coaching Features

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up which fields are tracked:

- "Customize Application"

Configure Key Company Goals

Key company goals give everyone in your organization visibility into a company-wide goal after you grant sharing access from the goal's detail page. Work.com administrators and people who have been granted access have the ability to create key company goals.

Alternatively, you can also set field-level security using permission sets.

1. From the object management settings for goals, go to the fields area.
2. Click on the **Key Company Goal** field label.
3. Click **Set Field-Level Security**.
4. Ensure the **Visible** checkbox is selected for all profiles with goals access.
5. Ensure the **Read-Only** checkbox is not selected for profiles that should be able to create key company goals.
6. Click **Save**.

SEE ALSO:

Goals and Coaching Features

Enable Feed Tracking for Goals

Enable Feed Tracking for Coaching

Enable History Tracking for Goal Fields

Enable History Tracking for Coaching Fields

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set field-level security:

- "Manage Profiles and Permission Sets"

  AND

  "Customize Application"

Performance Summary and Calibration Features

Set up Calibration reports to compare and update performance ratings in your organization.

Work.com performance summaries gather feedback about people in your organization with a custom questionnaire. You can create, deploy, and share different performance summaries across your organizations by managing performance summary cycles. Once users have submitted performance summary details, you can see and update performance ratings across the organization with the Calibration feature.

You can create and deploy performance summary cycles from the **Performance Cycles** tab. Users with the Performance Cycle Manager permission set or profile will be able to access the **Performance Cycles** tab.

EDITIONS

Available in: Salesforce Classic

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

For detailed information about creating and deploying performance summary cycles, refer to Performance Summary Cycles Overview in the Salesforce Help. For more information about the Calibration feature, refer to the Calibration Overview topic.

SEE ALSO:

Work.com Feature Overview

Set Up Calibration Reports

Set Up Calibration Reports

Calibration reports are populated with data from performance summary cycles. They are designed for managers and executives to review overall performance of their teams or organizations. Before using the Calibration feature, you must create a report that loads the performance summary data.

Define your own calibration report or download the calibration reports package from the Package Installation page.

- Production Calibration Report Package
- Sandbox Calibration Report Package

1. On the Calibration tab, select a calibration report from the drop-down list.
2. Click **View/Edit Report**.
3. Click **Save As**.
4. Type a name, an optional description, unique name, and specify the report folder.

   If the report is saved to a public folder, anyone with permission to view the folder sees this report, but each user will only see performance summaries they have access to. If the report is saved to "My Personal Custom Reports," only you will see the Calibration report.
5. Click **Save & Return to Report**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view the Calibration tab:
- "Enable Work.com Calibration"

Tip: You can also create a new report. Once a report meets specific criteria, it automatically appears in the Calibration drop down.

- The report must be a **Work.com Calibration** report type.
- The report must be in a **Summary Format**, grouped by Feedback Question Name and then by Feedback.
- These columns should be listed in the report:
  - Performance Cycle ID
  - Feedback Request ID

  - Feedback ID
  - Subject: User ID
  - Subject: Full Name (or Subject: First Name and Subject: Last Name)
- The report must be filtered to only view one performance summary cycle.

Once you've downloaded the package or created a report that meets the criteria, it automatically appears in the Calibration drop-down.

SEE ALSO:

Performance Summary and Calibration Features

Configure Work.com Reports

Work.com Report and Dashboard Overview

Use reports and dashboards to see how Work.com features are being used in your organization.

Salesforce reports and dashboards are available for all Work.com users. Administrators should install the reporting package that applies to their Work.com edition. The Work.com reporting package contains:

- Custom report types for Work.com objects
- Custom fields for Work.com objects
- Example dashboards

Install one of the following packages based on the Work.com edition you purchased. For example, if your organization has Work.com Align, only install the Align package. Refer to your product contract to confirm which Work.com edition you have.

EDITIONS

Available in: Salesforce Classic

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

Note:

- Make sure you've enabled the features related to your Work.com edition prior to installing the package. The package will only install correctly if you've enabled the features beforehand.
- If you purchased Work.com after the Spring '15 release, install the Work.com Perform package.
- It is not possible or necessary to install all the packages.

Production Packages:

- Work.com Motivate
- Work.com Align
- Work.com Perform
- Thanks and Skills Reports and Dashboards

Sandbox Packages:

- Work.com Motivate
- Work.com Align
- Work.com Perform

- Thanks and Skills Reports and Dashboards

SEE ALSO:

Work.com Implementation Overview

Work.com Feature Overview

Work.com Report and Dashboard Details

Work.com Report and Dashboard Details

EDITIONS

Available in: Salesforce Classic

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

The Work.com reports and dashboards included in the reporting package are a good starting point. Use these examples to create reports and dashboards that are useful to your organization.

Work.com Perform Package Reports

These reports are available after installing the Work.com Perform package. Work.com reports are organized in folders based on features:

- Work.com Coaching Reports
- Work.com Goal Reports
- Work.com Performance Summary Reports
- Work.com Recognition Reports
- Work.com Skills Reports

Table 9: Work.com Coaching Reports

Report Name	Description
Coaching Activities (Tasks and Events)	Tasks and events related to coaching spaces
Coaching Activities Team - Last 30 Days	Coaching activities of your team over the last 30 days
Coaching Activity Last 30 Days	Coaching activities over the last 30 days sorted by department
Coaching Coverage Report	The percentage of users that have coaching spaces by department
Coaching Events by Relationship	Events related to coaching spaces
Coaching Relationships	All coaching spaces in your organization

Table 10: Work.com Goal Reports

Report Name	Description
All Goals	All goals in your organization
All Metrics	All metrics in your organization
Goals Created by Date	Goals sorted by the date they were created
Key Company Goal Progress	Key company goals, their status, and other details
Metrics Flagged as Behind or Critical	Metrics with a Status of Behind or Critical

Report Name	Description
Stale Goals	Goals that haven't been modified in 30 days
Work.com Team Goals Progress	Your team's goals and their progress

Table 11: Work.com Performance Summary Reports

Report Name	Description
All Active Users with a Manager	All active users with a manager in your org
Manager Questions - X	The manager questions asked in a performance summary
Performance Answers by Question - Q1	Sample report for tracking performance cycle activity
Performance Answers by Question - Q3	Sample report for tracking performance cycle activity
Performance Summaries by Department	Performance summaries grouped by department
Performance Summaries with Answers - Q1	Sample report for tracking performance cycle activity
Performance Summaries with Answers - Q3	Sample report for tracking performance cycle activity
Performance Summary Cycle Status Update	The request status across different performance summaries
Self Summary Questions - X	The questions asked in self summaries
Summary Cycle Details	The percentage of participants per performance cycle
Summary Cycle Details - Submitted	The percentage of submitted requests per performance cycle

Table 12: Work.com Recognition Reports

Report Name	Description
Badges Given - By Date Given	Thanks badges given grouped by the date each badge was given
Breakdown of Badges Given	Thanks badges given grouped by individual badges and the role of the badge giver
Breakdown of Badges Received	Thanks badges received grouped by individual badges and the role of the badge recipient
Reward Funds Given	The amount of each reward fund that has been distributed
Reward Funds Remaining	The amount of each reward fund that is still remaining
Thanks by Giver	Thanks badges given by each user
Thanks Given - Recipient Data	Thanks badges received by each user
Thanks Received by Role	Thanks badges received by each role

Table 13: Work.com Skills Reports

Report Name	Description
Most Endorsed People	Users with the most skill endorsements
Most Skilled People	Users with the most associated skill records
New Skill Creation By Date	Skills arranged by the date they were created
Skill Endorsements By Date	Endorsements arranged by the date they were created
Skills Added To Profiles By Date	Skills arranged by the date they were associated with different user profiles
Top Skills	Skills arranged by the number of people with the skill

Work.com Perform Package Dashboards

These dashboards are available after installing the Work.com Perform package:

- Work.com Coaching Dashboards
- Work.com Performance Summary Dashboards
- Work.com Recognition Dashboards
- Work.com Skills Dashboards

Table 14: Work.com Coaching Dashboards

Report Name	Description
Company Coaching Dashboard	Displays coaching coverage and activity across your company
Company Goals Dashboard	Displays Key Company Goals and the number of goals created
Manager Coaching Dashboard	Displays coaching and goals related to your team

Table 15: Work.com Performance Summary Dashboards

Report Name	Description
Performance Cycle Dashboard	Displays statistics about the participants, questions, and progress of a specific performance cycle

Table 16: Work.com Recognition Dashboards

Report Name	Description
Recognition Dashboard	Displays badge statistics and users giving and receiving badges
Recognition with Rewards Dashboard	Displays badge and rewards statistics and users giving and receiving badges

Table 17: Work.com Skills Dashboards

Report Name	Description
Skills Dashboard	Displays skills statistics for your organization

SEE ALSO:

Work.com Report and Dashboard Overview

Recommended Work.com Permission Sets

Create different permission sets for different types of Work.com users.

Create new permission sets for each type of Work.com user.

Walk Through It: create, edit, and assign a permission set

Use the tables below to assign the appropriate object settings and system permissions for each permission set.

EDITIONS

Available in: Salesforce Classic

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

Standard User

The Standard User permission set gives a user all the basic Work.com functionality.

Table 18: Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Available ☑ Visible ☑						
Coaching (object)		☑	☑	☑			
Coaching (tab)	Available ☑ Visible ☑						
Documents		☑	☑	☑			
Endorsements		☑	☑	☑	☑		
Feedback (object)		☑	☑	☑	☑		
Feedback Questions		☑	☑	☑			
Feedback Question Sets		☑	☑	☑			
Feedback Requests (and Feedback tab)	Available ☑ Visible ☑	☑	☑	☑			

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Goal Links		☑	☑	☑	☑		
Goals (object)		☑	☑	☑	☑		
Goals (Completion Date field)		☑					
Goals (Key Company Goal field)		☑					
Goals (tab)	Available ☑ Visible ☑						
Metric Data Links		☑	☑	☑	☑		
Metrics		☑	☑	☑	☑		
Performance Cycles	Available ☑ Visible ☑	☑					
Recognition (tab)	Available ☑ Visible ☑						
Reward Funds	Available ☑ Visible ☑	☑					
Reward Fund Types	Available ☑ Visible ☑	☑					
Rewards		☑					
Skills	Available ☑ Visible ☑	☑	☑				
Skill Users		☑	☑	☑	☑		

Table 19: Standard User System Permissions

System Permissions	Enabled
API Enabled	☑
Edit Events	☑

System Permissions	Enabled
Edit Tasks	☑

Performance Cycle Manager

The Performance Cycle Manager permission set is typically used for creating and deploying performance summaries to employees.

Note: This permission set should be assigned in addition to the Standard User permission set.

Table 20: Performance Cycle Manager Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Calibration (tab)	Available ☑ Visible ☑						
Feedback (object)		☑	☑	☑	☑	☑	☑
Feedback Questions		☑	☑	☑	☑	☑	☑
Feedback Question Sets		☑	☑	☑	☑	☑	☑
Feedback Requests (and Feedback tab)	Available ☑ Visible ☑	☑	☑	☑	☑	☑	☑
Performance Cycles	Available ☑ Visible ☑	☑	☑	☑	☑	☑	☑

Table 21: Performance Cycle Manager System Permissions

System Permissions	Enabled
Enable Work.com Calibration	☑
View Setup and Configuration	☑

Custom Badge Creator

The Custom Badge Creator permission set gives users the ability to create custom badges.

Note:

- If the Restrict Custom Badge Creators preference is enabled, users must also have Create enabled on the Reward object.
- This permission set should be assigned in addition to the Standard User permission set.

Table 22: Custom Badge Creator System Permissions

System Permissions	Enabled
Create custom Badge Definitions	✓
Moderate Chatter	✓

Reward Creator

The Reward Creator permission set is for users who should have the ability to link badges to tangible rewards.

Note: This permission set should be assigned in addition to the Standard User permission set.

Table 23: Reward Creator Object Settings

Object Name	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Reward Funds	✓	✓	✓	✓		
Reward Fund Types	✓	✓	✓	✓		
Rewards	✓	✓	✓	✓		

Table 24: Reward Creator System Permissions

System Permissions	Enabled
Create custom Badge Definitions	✓

Work.com Administrator

The Work.com Administrator permission set gives a user full administrative access to Work.com objects and features. This permission set should be assigned instead of the Standard User permission set.

Table 25: Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Available ✓ Visible ✓						
Calibration (tab)	Available ✓ Visible ✓						
Coaching (object)		✓	✓	✓	✓	✓	✓

Object Name	**Tab Settings**	**Read**	**Create**	**Edit**	**Delete**	**View All Data (VAD)**	**Modify All Data (MAD)**
Coaching (tab)	Available ☑ Visible ☑						
Documents		☑	☑	☑	☑	☑	☑
Endorsements		☑	☑	☑	☑	☑	☑
Feedback (object)		☑	☑	☑	☑	☑	☑
Feedback Questions		☑	☑	☑	☑	☑	☑
Feedback Question Sets		☑	☑	☑	☑	☑	☑
Feedback Requests (and Feedback tab)	Available ☑ Visible ☑	☑	☑	☑	☑	☑	☑
Goal Links		☑	☑	☑	☑	☑	☑
Goals (object)		☑	☑	☑	☑	☑	☑
Goals (Completion Date field)		☑					
Goals (Key Company Goal field)		☑		☑			
Goals (tab)	Available ☑ Visible ☑						
Metric Data Links		☑	☑	☑	☑	☑	☑
Metrics		☑	☑	☑	☑	☑	☑
Performance Cycles	Available ☑ Visible ☑	☑	☑	☑	☑	☑	☑
Recognition (tab)	Available ☑ Visible ☑						
Reward Funds	Available ☑ Visible ☑	☑	☑	☑	☑	☑	☑
Reward Fund Types	Available ☑ Visible ☑	☑	☑	☑	☑	☑	☑

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Rewards		☑	☑	☑	☑	☑	☑
Skills	Available ☑ Visible ☑	☑	☑	☑	☑	☑	☑
Skill Users		☑	☑	☑	☑	☑	☑

Table 26: Work.com Administrator System Permissions

System Permissions	Enabled
API Enabled	☑
Create custom Badge Definitions	☑
Edit Events	☑
Edit Tasks	☑
Enable Work.com Calibration	☑
Moderate Chatter	☑
View Setup and Configuration	☑

SEE ALSO:

Work.com Feature Access

Assign Work.com Permission Sets

Recommended Work.com Profiles

Create different profiles for different types of Work.com users.

Create a new profile for each type of Work.com user. For more information about creating profiles, see either Working with Profiles in the Original Profile Interface or Work in the Enhanced Profile User Interface Overview Page depending on whether you have the Enable Enhanced Profile User Interface preference turned on.

Note: Professional Edition organizations will need to grant access through existing profiles. The Work.com Only User, Chatter Only User, and Standard User profiles grant basic access to Work.com objects. The System Administrator profile grants users full administrative access to all Work.com features.

Use the tables below to assign the appropriate object settings and system permissions for each profile.

EDITIONS

Available in: Salesforce Classic

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

Standard User

The Standard User profile gives a user all the basic Work.com functionality.

Table 27: Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Coaching (object)		✓	✓	✓			
Coaching (tab)	Default On						
Documents		✓	✓	✓			
Endorsements		✓	✓	✓	✓		
Feedback (object)		✓	✓	✓	✓		
Feedback Questions		✓	✓	✓			
Feedback Question Sets		✓	✓	✓			
Feedback Requests (and Feedback tab)	Default On	✓	✓	✓			
Goal Links		✓	✓	✓	✓		
Goals (object)		✓	✓	✓	✓		
Goals (Completion Date field)		✓					
Goals (Key Company Goal field)		✓					
Goals (tab)	Default On						
Metric Data Link		✓	✓	✓	✓		
Metrics		✓	✓	✓	✓		
Performance Cycles	Default On	✓					
Recognition (tab)	Default On						
Reward Funds	Default On	✓					
Reward Fund Types	Default On	✓					
Rewards		✓					
Skills	Default On	✓	✓				

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Skill Users		☑	☑	☑	☑		

Table 28: Standard User System Permissions

System Permissions	Enabled
API Enabled	☑
Edit Events	☑
Edit Tasks	☑

Performance Cycle Manager

The Performance Cycle Manager profile is typically used for creating and deploying performance summaries to employees.

Table 29: Performance Cycle Manager Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Calibration (tab)	Default On						
Coaching (object)		☑	☑	☑	☑		
Coaching (tab)	Default On						
Documents		☑	☑	☑			
Endorsements		☑	☑	☑	☑		
Feedback (object)		☑	☑	☑	☑	☑	☑
Feedback Questions		☑	☑	☑	☑	☑	☑
Feedback Question Sets		☑	☑	☑	☑	☑	☑
Feedback Requests (and Feedback tab)	Default On	☑	☑	☑	☑	☑	☑
Goal Links		☑	☑	☑	☑		
Goals (object)		☑	☑	☑	☑		
Goals (Completion Date field)		☑					

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Goals (Key Company Goal field)		✓					
Goals (tab)	Default On						
Metric Data Link		✓	✓	✓	✓		
Metrics		✓	✓	✓	✓		
Performance Cycles	Default On	✓	✓	✓	✓	✓	✓
Recognition (tab)	Default On						
Reward Funds	Default On	✓					
Reward Fund Types	Default On	✓					
Rewards		✓					
Skills	Default On	✓	✓				
Skill Users		✓	✓	✓	✓		

Table 30: Performance Cycle Manager System Permissions

System Permissions	Enabled
API Enabled	✓
Edit Events	✓
Edit Tasks	✓
Enable Work.com Calibration	✓
View Setup and Configuration	✓

Work.com Administrator

The Work.com Administrator profile gives a user full administrative access to Work.com objects and features.

Table 31: Work.com Administrator Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Calibration (tab)	Default On						

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Coaching (object)		☑	☑	☑	☑	☑	☑
Coaching (tab)	Default On						
Documents		☑	☑	☑	☑	☑	☑
Endorsements		☑	☑	☑	☑	☑	☑
Feedback (object)		☑	☑	☑	☑	☑	☑
Feedback Questions		☑	☑	☑	☑	☑	☑
Feedback Question Sets		☑	☑	☑	☑	☑	☑
Feedback Requests (and Feedback tab)	Default On	☑	☑	☑	☑	☑	☑
Goal Links		☑	☑	☑	☑	☑	☑
Goals (object)		☑	☑	☑	☑	☑	☑
Goals (Completion Date field)		☑					
Goals (Key Company Goal field)		☑		☑			
Goals (tab)	Default On						
Metric Data Link		☑	☑	☑	☑	☑	☑
Metrics		☑	☑	☑	☑	☑	☑
Performance Cycles	Default On	☑	☑	☑	☑	☑	☑
Recognition (tab)	Default On						
Reward Funds	Default On	☑	☑	☑	☑	☑	☑
Reward Fund Types	Default On	☑	☑	☑	☑	☑	☑
Rewards		☑	☑	☑	☑	☑	☑
Skills	Default On	☑	☑	☑	☑	☑	☑
Skill Users		☑	☑	☑	☑	☑	☑

Table 32: Work.com Administrator System Permissions

System Permissions	Enabled
API Enabled	✓
Create custom Badge Definitions	✓
Edit Events	✓
Edit Tasks	✓
Enable Work.com Calibration	✓
Moderate Chatter	✓
View Setup and Configuration	✓

SEE ALSO:

- Work.com Feature Access
- Assign Work.com Profiles

Manage Work.com Features

Enable or Disable Work.com Settings

On the Work.com Settings page, you can enable and disable features like Thanks, Rewards, Calibration, and Skills for your organization.

All the settings except for Thanks Settings and Skills Settings require a Work.com license. Work.com is available as an add-on license for **Professional Edition**, **Enterprise Edition**, or **Unlimited Edition** and is included in **Performance Edition**.

1. From Setup, enter "Work.com Settings" in the `Quick Find` box, then select **Work.com Settings**.
2. Select the Work.com feature you want to enable or deselect the feature you want to disable.

Feature	Section	Description
Enable Thanks	**Thanks Settings**	Enable Thanks to allow users to recognize others with thanks badges on the Chatter feed. If you disable this setting, users no longer see the Thanks action in the Chatter publisher. However, they can still see previously created Thanks posts.
Restrict Custom Badge Creators	**Thanks Settings**	By default, all users can create custom badges. This setting restricts badge creation to users that

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit Work.com settings:
- "Customize Application"

Feature	Section	Description
		have the “Create” permission on the Reward object.
Enable Rewards	**Recognition Settings**	Enable Rewards to tie tangible rewards to badges. Reward creators can upload gift codes to create Reward funds. See the “Reward Funds” topic for more information about creating rewards.
Enable Manager Groups for Coaching	**Coaching Settings**	Enable manager groups to give managers access to the coaching spaces of the users that report to them. To enable this setting, the Manager Groups setting must first be enabled in Setup, under **Sharing Settings**.
Enable Manager Groups for Goals	**Goal Settings**	Enable manager groups to give managers access to the goals of the users that report to them. To enable this setting, the Manager Groups setting must first be enabled in Setup, under **Sharing Settings**.
Enable Calibration	**Perform Settings**	Enable Calibration to see and update performance across teams and individuals. Note: For **Performance Edition** organizations, Calibration is not available for the following profiles: Contract Manager, Marketing User, Read Only, and Solution Manager.
Enable Skills	**Skills Settings**	Enable Skills to allow users to add skills to their profiles and endorse the skills of other users. Enabling this setting replaces the Knowledgeable About widget on Chatter profiles.
Restrict Skill and Endorsement Editing to Record Detail Pages	**Skills Settings**	Disables inline editing of skills and endorsements on Chatter profiles, and restricts editing to record detail pages. Recommended if you have customized these objects with custom required fields. Note: Don’t enable this setting if you want to use skills in Chatter profiles.
Enable Automatic Skill Feed Posts	**Skills Settings**	Enable to automatically create Chatter feed posts when a user adds a new skill.
Enable Suggested Skills	**Skills Settings**	Enable Suggested Skills to have the skills widget suggest skills for users to add based on their Chatter Topics activity.

3. Click **Save**.

SEE ALSO:

Work.com Implementation Overview
Performance Summary Cycles Overview
Work.com Editions and Permissions
Calibration Overview
Skills Customization
Contact Work.com Support

Work.com Editions and Permissions

Most Work.com features require the Work.com add-on, but Skills and Thanks functionality (excluding Rewards) are freely available to Sales Cloud users. The permissions and preferences necessary for different tasks are broken up by feature area.

EDITIONS

Available in: Salesforce Classic

Work.com is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

General Work.com Administrator Tasks

This includes tasks for administering and implementing Work.com.

Administrator Task	Preferences and Permissions Required
Enable Work.com features:	“Customize Application”
Assign a Work.com administrator:	“Customize Application”
Assign permission sets:	“Assign Permission Sets”
Assign profiles:	“Manage Users”
Assign user licenses:	“Manage Users”
Assign user feature licenses	“Manage Users”
Set up actions:	“Customize Application”
Customize fields tracked in feeds:	“Customize Application”
Set field-level security:	“Manage Profiles and Permission Sets” “Customize Application”

Thanks and Reward Tasks

This includes tasks for Work.com end users, such as viewing and creating thanks badges and rewards.

End User Task	Preferences and Permissions Required
View the Badges tab:	No additional user permissions needed

End User Task	Preferences and Permissions Required
Build a badge:	“Create” on Documents The “Restrict Custom Badge Creator” setting is disabled by default. If the setting is enabled, users need the “Create Custom Badge Definitions” permission.
View Reward Funds:	“Read” on Reward Funds
Create Reward Funds:	“Create” on Rewards “Create” on Reward Funds
View Reward Fund Types:	“Read” on Reward Fund Types
Create Reward Fund Types:	“Create” on Reward Fund Types “Read” and “Create” on Reward Funds “Read” and “Create” on Rewards

Skills Tasks

This includes tasks for Work.com end users using skills.

End User Task	Preferences and Permissions Required
Add skills:	“Create” on Skills and Skill Users
Remove skills:	“Read” on Skills “Delete” on Skill Users
Add endorsements to skills:	“Create” on Endorsements “Read” on Skills and Skill Users

Goal Tasks

This includes tasks for Work.com end users using goals.

End User Task	Preferences and Permissions Required
View goals:	“Read” on Goals and Goal Links
Create goals:	“Create” on Goals and Goal Links
Edit goals:	“Edit” on Goals and Goal Links
Delete goals:	“Delete” on Goals and Goal Links

Metric Tasks

This includes tasks for Work.com end users using metrics.

End User Task	Preferences and Permissions Required
View metrics:	“Read” on Metrics
Create metrics:	“Create” on Metrics
Link metrics to reports:	“Create” on Metric Data Links

Coaching Tasks

This includes tasks for Work.com end users using coaching spaces.

End User Task	Preferences and Permissions Required
View coaching spaces:	“Read” on Coaching
Create coaching spaces:	“Create” on Coaching
Set coaching to Inactive:	“Edit” on Coaching

Feedback Tasks

This includes tasks for Work.com end users using feedback.

End User Task	Preferences and Permissions Required
View Feedback:	“Read” on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests “Read” on Performance Cycles
Create Feedback:	“Create” on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests “Read” on Performance Cycles
Edit or submit Feedback:	“Edit” on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests “Read” on Performance Cycles
Delete Feedback (only for administrators with MAD/VAD permissions)	“Delete” on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests “Read” on Performance Cycles

Performance Summary Tasks

This includes tasks for Work.com end users using performance summaries.

End User Task	Preferences and Permissions Required
View performance summaries:	"Read" on Performance Cycles
Create performance summaries:	"Create" on Performance Cycles
Answer and submit performance summaries:	"Create," "Read," and "Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles
Add peers to performance summaries	"Create," "Read," and "Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles

Performance Summary Cycle Tasks

This includes tasks for Work.com administrators managing performance summary cycles.

Administrator Task	Preferences and Permissions Required
Create a performance summary cycle:	"Create," "Read," "Edit," "Delete," "View All," and "Modify All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles
Add people to a performance summary cycle:	"View Setup and Configuration" "Create," "Read," "Edit," "Delete," "View All," and "Modify All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles
Delete people from a performance summary cycle:	"Create," "Read," "Edit," "Delete," "View All," and "Modify All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles
Edit a performance summary cycle:	"Create," "Read," "Edit," "Delete," "View All," and "Modify All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles
View the Calibration tab:	"Enable Work.com Calibration"
Edit performance ratings:	"Create," "Read," and "Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles "Enable Work.com Calibration"

SEE ALSO:

Enable or Disable Work.com Settings

Work.com Implementation Overview

Contact Work.com Support

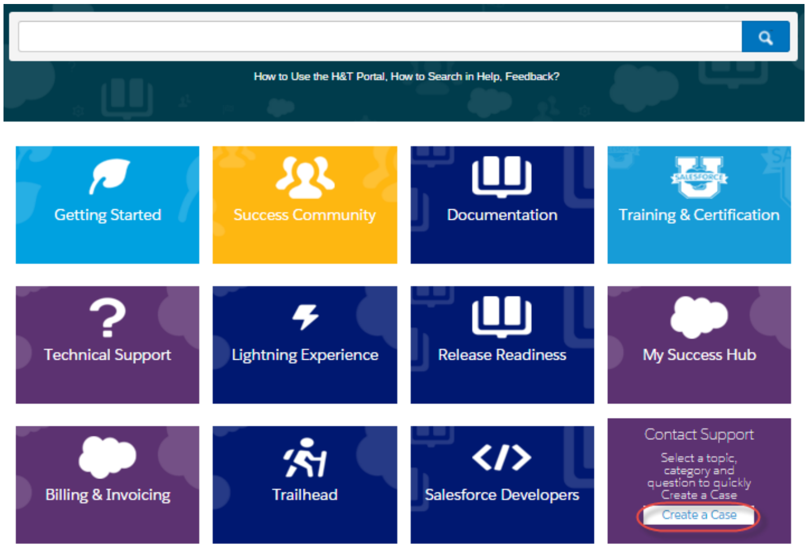
EDITIONS

Available in: Salesforce Classic

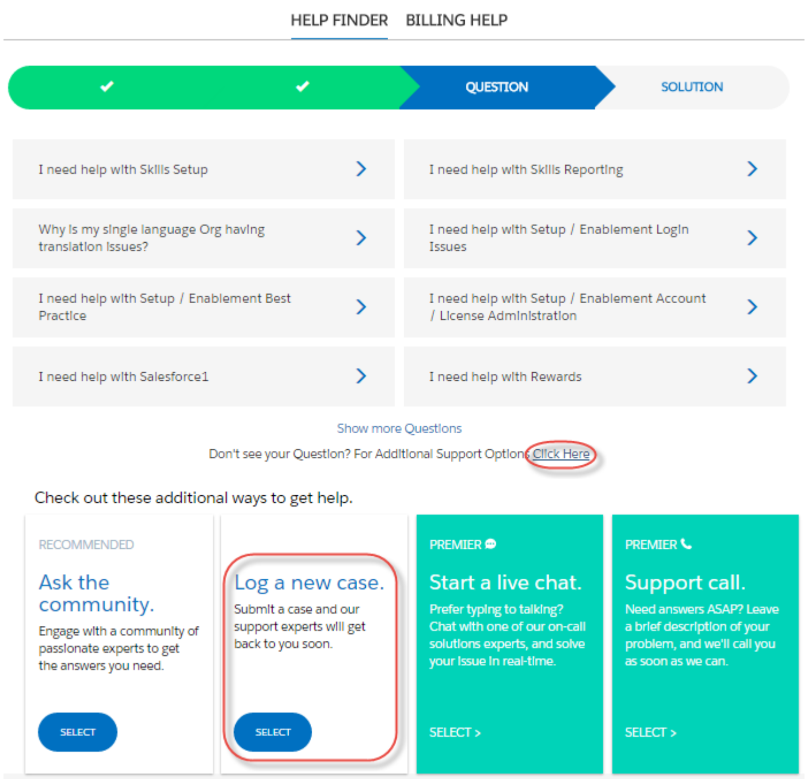
Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Log a ticket with Work.com support if you need certain permissions enabled or are experiencing technical difficulties.

1. Log in to Salesforce, then go to the Help and Training page.
2. In the Contact Support section, click **Create a Case**.



3. Click **Sales Cloud**.
4. Click **Work.com**.
   A list of common issues appears.
5. If you don’t see the solution to your issue, select **Click Here** to view additional support options, and log a new case.



- I need help with Skills Setup
- I need help with Skills Reporting
- Why is my single language Org having translation issues?
- I need help with Setup / Enablement Login Issues
- I need help with Setup / Enablement Best Practice
- I need help with Setup / Enablement Account / License Administration
- I need help with Salesforce1
- I need help with Rewards

Show more Questions

Don't see your Question? For Additional Support Option Click Here

Check out these additional ways to get help.

RECOMMENDED
Ask the community.
Engage with a community of passionate experts to get the answers you need.

Log a new case.
Submit a case and our support experts will get back to you soon.

PREMIER
Start a live chat.
Prefer typing to talking? Chat with one of our on-call solutions experts, and solve your issue in real-time.

PREMIER
Support call.
Need answers ASAP? Leave a brief description of your problem, and we'll call you as soon as we can.

6. Enter case details and click **Submit**.

SEE ALSO:

Enable or Disable Work.com Settings

Performance Summary Cycles Overview

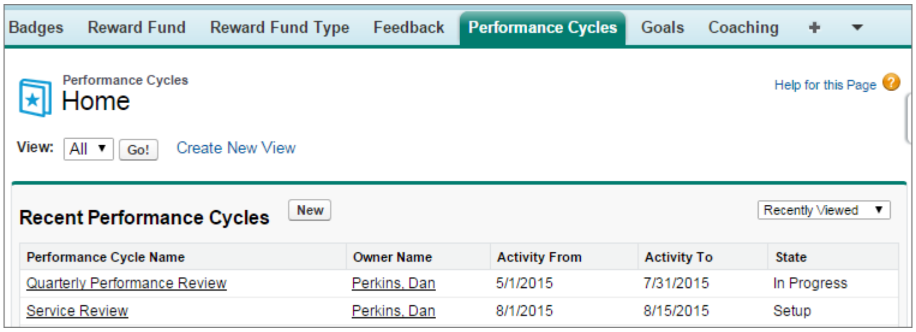
Use Work.com performance summary cycles to create, deploy, and share performance summaries across your company.

In a typical performance summary cycle, you perform the following activities:

1. Plan—Create a performance summary cycle and add the people you want reviewed.
2. Deploy—Make the performance summaries available for users to complete.
3. Evaluate—Write performance summaries and submit them.
4. Calibrate—Optionally compare and update submitted performance summaries with the Calibration feature.
5. Share—Share the submitted performance summaries with summary subjects.
6. Finish—End the performance summary cycle.

Click the Performance Cycles tab to see a list of recently viewed performance cycles.

> Note: If the Performance Cycles tab isn't displayed, select Work.com from the Force.com app drop-down menu at the top-right or click + to the right of your current tabs and select it from the All Tabs page.



Performance Cycle Name	Owner Name	Activity From	Activity To	State
Quarterly Performance Review	Perkins, Dan	5/1/2015	7/31/2015	In Progress
Service Review	Perkins, Dan	8/1/2015	8/15/2015	Setup

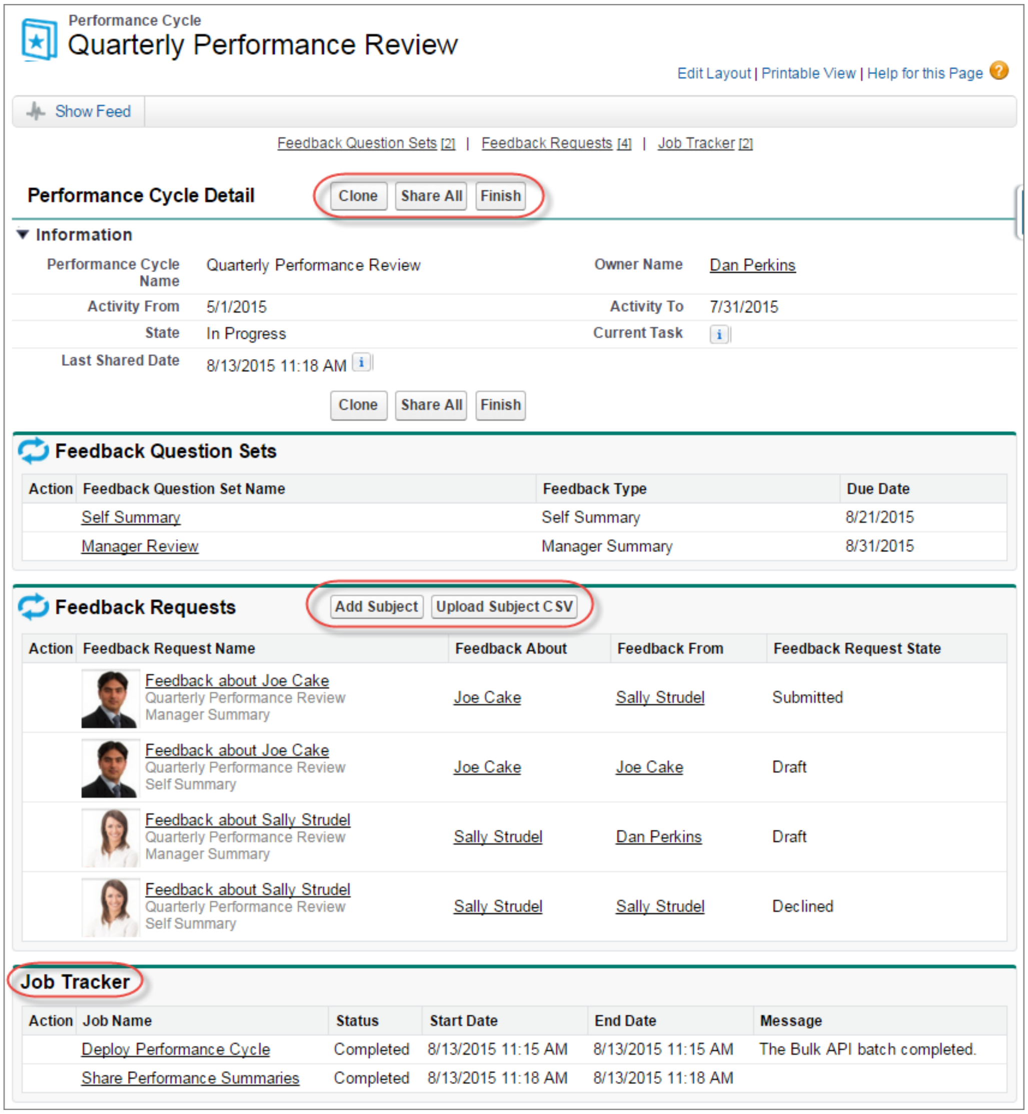
Click **New** to create a performance cycle, or click the name of a cycle to see more details.

EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.


Edit Layout | Printable View | Help for this Page
Show Feed
Feedback Question Sets [2] | Feedback Requests [4] | Job Tracker [2]
Clone
Share All
Finish
Add Subject
Upload Subject CSV

Performance Cycle

Quarterly Performance Review

Performance Cycle Detail

Information

Performance Cycle Name	Quarterly Performance Review	Owner Name	Dan Perkins
Activity From	5/1/2015	Activity To	7/31/2015
State	In Progress	Current Task	
Last Shared Date	8/13/2015 11:18 AM		

Feedback Question Sets

Action	Feedback Question Set Name	Feedback Type	Due Date
	Self Summary	Self Summary	8/21/2015
	Manager Review	Manager Summary	8/31/2015

Feedback Requests

Action	Feedback Request Name	Feedback About	Feedback From	Feedback Request State
	Feedback about Joe Cake Quarterly Performance Review Manager Summary	Joe Cake	Sally Strudel	Submitted
	Feedback about Joe Cake Quarterly Performance Review Self Summary	Joe Cake	Joe Cake	Draft
	Feedback about Sally Strudel Quarterly Performance Review Manager Summary	Sally Strudel	Dan Perkins	Draft
	Feedback about Sally Strudel Quarterly Performance Review Self Summary	Sally Strudel	Sally Strudel	Declined

Job Tracker

Action	Job Name	Status	Start Date	End Date	Message
	Deploy Performance Cycle	Completed	8/13/2015 11:15 AM	8/13/2015 11:15 AM	The Bulk API batch completed.
	Share Performance Summaries	Completed	8/13/2015 11:18 AM	8/13/2015 11:18 AM	

From this page you can:

- See details about the performance summary cycle.
- Take actions on the cycle. Available actions are determined by your cycle's state and may include **Clone**, **Edit**, **Deploy**, **Delete**, **Share All**, and **Finish**.
- Access the questions related to a performance cycle.
- View a list of performance summary feedback requests. You can also add subjects individually or upload a CSV file to add subjects in bulk.

- View a list of jobs performed by the performance cycle, including cycle deployment and sharing performance summaries.

SEE ALSO:

Create a Performance Summary Cycle
Add People to a Performance Summary Cycle
Delete People from a Performance Summary Cycle
Deploy a Performance Summary Cycle
Performance Summary Cycle Actions

Create a Performance Summary Cycle

Create a Work.com performance summary cycle from the Performance Cycles page to gather feedback about people in your organization.

1. Click the Performance Cycles tab.

   If the Performance Cycles tab isn't displayed, select Work.com from the Force.com app drop-down menu at the top-right or click + to the right of your current tabs and select it from the All Tabs page.

2. Click **New**.

   Note: You can also create performance cycles by clicking **Clone** on another performance cycle's detail page, but cloning a cycle copies only the cycle name, activity start date, and activity end date. Question sets, due dates, and other details are not copied.

3. Enter a cycle name, an activity start date, and an activity end date.
4. Click **Save**.
5. Click **New Feedback Question Set**.
6. Enter a question set name, feedback type, and due date.

   Question sets group questions according to their intended audience. For example, a performance summary about Bill Jones could have up to four different audiences:

   - Manager Summary—Questions for Bill's manager. By default, every cycle must include a manager summary.
   - Self Summary—Questions for Bill.
   - Peer Summary—Questions for Bill's peers.
   - Skip Level Summary—Questions for Bill's direct reports.

7. Click **Save**.
8. Click **New Feedback Question**.
9. Enter question details.

   You can specify rules for each question:

   - Optional—The person writing the summary isn't required to answer this question.
   - Confidential—The subject of the summary won't see the submitted answer. This rule isn't available for self summaries.

   You can also add instructions at the beginning of each question.

EDITIONS

Available in: Salesforce Classic

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

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USER PERMISSIONS

To view performance summaries:

- "Read" on Performance Cycles

To create a Performance Summary Cycle:

- "Create," "Read," "Edit," "Delete," "Modify All," and "View All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles

10. Click **Save**.
11. Add additional question sets and questions, as needed.

Once you're done adding questions, add people to the performance summary cycle.

SEE ALSO:

Performance Summary Cycles Overview

Add People to a Performance Summary Cycle

Deploy a Performance Summary Cycle

Add People to a Performance Summary Cycle

Add people to a performance summary cycle manually or through a CSV file.

You can only add people to summary cycles with a state of Setup or In Progress.

1. Click the Performance Cycles tab.

   If the Performance Cycles tab isn't displayed, select Work.com from the Force.com app drop-down menu at the top-right or click + to the right of your current tabs and select it from the All Tabs page.

2. Click a performance summary cycle.

3. In the Feedback Requests section, add users to the performance cycle.

   - To manually enter subjects, click **Add Subject**. Enter the user's name and click **Save**.
   - To upload subjects through a CSV file, click **Upload Subject CSV**, then select **Choose File**. Select a CSV file, click **Upload**, and save your changes.

     The CSV file should contain a list of either user IDs (example: 005R0000000DjZW) or usernames (example: john@acme.com) in the first column. The data should begin on the second row, because the first row is seen as the header row and is not uploaded.

     Tip: Many organizations have specific requirements about participation in a performance summary cycle. Use the Users report to narrow down the list of users you want to add to performance summaries and obtain the usernames there.

The Job Tracker displays the status of the CSV upload. Additionally, you can confirm the users included in a performance summary cycle in the Feedback Requests section.

SEE ALSO:

Performance Summary Cycles Overview

Deploy a Performance Summary Cycle

Delete People from a Performance Summary Cycle

EDITIONS

Available in: Salesforce Classic

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

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USER PERMISSIONS

To view performance summaries:

- "Read" on Performance Cycle

To add people to a Performance Summary Cycle:

- "View Setup and Configuration"

  AND

  "Create," "Read," "Edit," "Delete," "Modify All," and "View All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles

Delete People from a Performance Summary Cycle

If you added someone you don't need to evaluate, delete them from the performance summary cycle.

You can only delete people from summary cycles with a state value of Setup.

1. Click the Performance Cycles tab.

   If the Performance Cycles tab isn't displayed, select Work.com from the Force.com app drop-down menu at the top-right or click + to the right of your current tabs and select it from the All Tabs page.

2. Click a performance summary cycle.
3. In the Feedback Requests section, click **Del** in the Action column of the subject you want to delete.

SEE ALSO:

- Performance Summary Cycles Overview
- Deploy a Performance Summary Cycle
- Add People to a Performance Summary Cycle

EDITIONS

Available in: Salesforce Classic

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

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USER PERMISSIONS

To view performance summaries:

- "Read" on Performance Cycle

To delete people from a Performance Summary Cycle:

- "Create," "Read," "Edit," "Delete," "Modify All," and "View All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles

Deploy a Performance Summary Cycle

Deploy a performance summary cycle to make the summaries available for people to complete.

Note: You can't edit questions or cycle details after a performance summary cycle is deployed, but you can add more people.

1. Click the Performance Cycles tab.

   If the Performance Cycles tab isn't displayed, select Work.com from the Force.com app drop-down menu at the top-right or click + to the right of your current tabs and select it from the All Tabs page.

2. Click a performance summary cycle.
3. Click **Deploy**.

   Any inactive users are automatically removed prior to cycle deployment. When deployment is complete, you'll receive a detailed email that describes the cycle deployment and any users that were removed. You can add them back again later, if necessary.

Once deployed, a manager summary is assigned to the manager of each person added to the cycle. If the cycle contains self summaries, the self summary is assigned to the associated person. Each person assigned a summary receives an email notification and can start working on their summaries.

SEE ALSO:

Performance Summary Cycles Overview

Create a Performance Summary Cycle

EDITIONS

Available in: Salesforce Classic

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

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USER PERMISSIONS

To edit a Performance Summary Cycle:

- "Create," "Read," "Edit," "Delete," "Modify All," and "View All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, Performance Cycles

Performance Summary Cycle Actions

Different actions are available on a performance cycle's detail page depending on the cycle's state.

Action	Available In	Description
Edit	Setup	Allows user to edit a performance cycle's name, activity start date, and activity end date.
Deploy	Setup	Deploys the summary cycle and associated summaries. Changes the summary cycle status to In Progress.
Delete	Setup	Deletes a summary cycle and the associated summaries.
Finish	In Progress	Completes a performance summary cycle and changes the summary cycle status to Finished. This also removes declined summaries and summaries that were not submitted.
Clone	Setup, In Progress, Finished	Clones a summary cycle. This copies the cycle name, activity start date, and activity end date. However, question sets, due dates, people, and other details are not copied.
Share All	In Progress	Shares the submitted performance summaries with the summary subjects. This doesn't include questions marked Confidential.

EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

SEE ALSO:

- Performance Summary Cycles Overview
- Create a Performance Summary Cycle
- Deploy a Performance Summary Cycle

Calibration Overview

Use Work.com calibration reports to visualize, compare, and update performance ratings across your entire company.

Note: For **Performance Edition** organizations, Calibration is not available for the following profiles: Contract Manager, Marketing User, Read Only, and Solution Manager.

Calibration reports are populated with data from performance summary cycles. They are designed for managers and executives to review overall performance of their teams or organizations. You can quickly identify high and low performers, and depending on user permissions, make changes to a person's individual performance ratings directly in the calibration report.

Create your own calibration report or download the calibration reports package from the Package Installation page.

- Production Calibration Report Package
- Sandbox Calibration Report Package

Access calibration reports from the Calibration tab. Note that you can only view the results for a single performance summary cycle at a time.

The Distribution Graph shows the distribution of ratings for each multiple choice question. Select different questions in the drop-down list to view the associated rating distribution.

The Employees in Graph section shows the performance summary details for users included in the performance review. You can filter and sort each column. Filtering the columns also updates the distribution graph. You can also add custom columns to filter performance summary details by location, department, or other measures. View individual performance summaries by clicking on the View column.

SEE ALSO:

Enable or Disable Work.com Settings
Create a Calibration Report
Customize a Calibration Report
Update Performance Summary Details
Export Calibration Report Details
Performance Summary Cycles Overview

EDITIONS

Available in: Salesforce Classic

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

Calibration requires a license to **Work.com**, which is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view the Calibration tab:

- "Enable Work.com Calibration"

To edit performance ratings:

- "Create," "Read," and "Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests

  AND

  "Read" on Performance Cycles

Create a Calibration Report

Create a calibration report by copying an existing report or creating a new report that meets the proper criteria.

Alternatively, you can download the calibration report package from the Package Installation page.

- Production Calibration Report Package
- Sandbox Calibration Report Package

1. On the Calibration tab, select a calibration report from the drop-down list.
2. Click **View/Edit Report**.
3. Click **Save As**.
4. Type a name, an optional description, unique name, and specify the report folder.

   If the report is saved to a public folder, anyone with permission to view the folder sees this report, but each user will only see performance summaries they have access to. If the report is saved to "My Personal Custom Reports," only you will see the Calibration report.
5. Click **Save & Return to Report**.

Tip: You can also create a new report. Once a report meets specific criteria, it automatically appears in the Calibration drop down.

- The report must be a **Work.com Calibration** report type.
- The report must be in a **Summary Format**, grouped by Feedback Question Name and then by Feedback.
- These columns should be listed in the report:
  - Performance Cycle ID
  - Feedback Request ID
  - Feedback ID
  - Subject: User ID
  - Subject: Full Name (or Subject: First Name and Subject: Last Name)
- The report must be filtered to only view one performance summary cycle.

SEE ALSO:

Calibration Overview

Customize a Calibration Report

EDITIONS

Available in: Salesforce Classic

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

Calibration requires a license to **Work.com**, which is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view the Calibration tab:

- "Enable Work.com Calibration"

Customize a Calibration Report

Enhance your calibration report with additional columns and filters.

Calibration reports use Salesforce reporting. You can filter and specify additional custom columns for your calibration report. The columns display in the order you specify. However, the sort order in reports doesn't apply in calibration reports.

1. On the Calibration tab, select a calibration report from the drop-down list.
2. Click **View/Edit Report**.
3. Click **Customize**.
4. Add filters and columns to your report, as necessary.
   - The following columns are required and can't be removed from calibration reports:
     - Performance Cycle ID
     - Feedback Request ID
     - Feedback ID
     - Subject: User ID
     - Subject: Full Name (or Subject: First Name and Subject: Last Name)
5. Click **Save**.

Example: Some common uses include:

- Filter by Performance Summary Cycle for the required performance summary cycle
- Filter by Department to create a report for the department
- Filter by Location to create a report for that location

SEE ALSO:

Calibration Overview

Create a Calibration Report

EDITIONS

Available in: Salesforce Classic

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

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USER PERMISSIONS

To view the Calibration tab:

- "Enable Work.com Calibration"

Update Performance Summary Details

Easily update performance summary details directly in the calibration report.

You can only update performance summaries you have access to. If you have "Modify All Data" or "View All Data" permissions for performance summaries, then you can see the ratings of performance summaries before they are submitted. The only editable fields are the multiple choice questions answered by a user's manager, and do not include peer, self, or skip level summaries. Once the performance summary is finalized and shared with the user, answers can't be edited.

1. On the Calibration tab, select a calibration report from the drop-down list.
2. On the Employees in Graph section, double-click the rating to you want to change.

   You can only change ratings on a submitted performance summary.
3. Select the new value.
4. Click **Save**.

SEE ALSO:

Calibration Overview

Create a Calibration Report

EDITIONS

Available in: Salesforce Classic

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

Calibration requires a license to **Work.com**, which is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view the Calibration tab:
- "Enable Work.com Calibration"

To edit performance ratings:
- "Create," "Read," and "Edit" on Feedback, Feedback Question, Feedback Question Sets, and Feedback Requests

  AND

  "Read" on Performance Cycles

Export Calibration Report Details

Performance summary data can be exported with the underlying calibration report.

1. On the Calibration tab, select a calibration report.
2. Click **View/Edit Report**.
3. Click **Export Details**.
4. Select the file encoding and file format.
5. Click **Export**.

SEE ALSO:

Calibration Overview

Create a Calibration Report

EDITIONS

Available in: Salesforce Classic

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

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USER PERMISSIONS

To view the Calibration tab:

- "Enable Work.com Calibration"

To edit performance ratings:

- "Create," "Read," and "Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests

  AND

  "Read" on Performance Cycles

Skills Customization

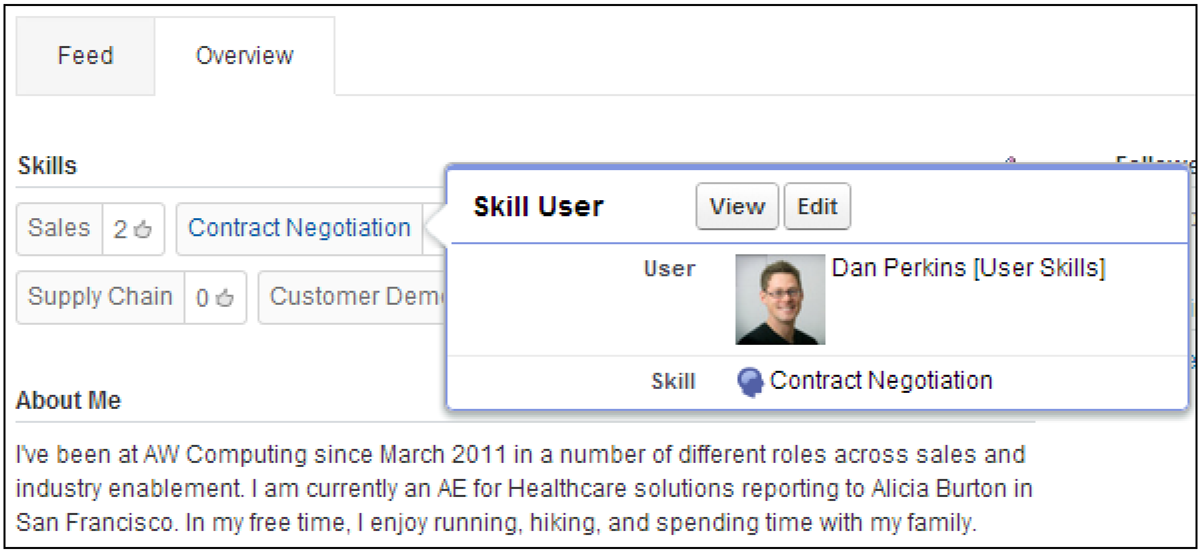
You can change object permissions for the skill and endorsement objects to suit the needs of your organization.

Customize the skill and endorsement objects in the same way you edit other objects. This includes adding custom fields, modifying page layouts, and adding triggers, workflow, and validation rules. You can also customize the hovers that appear on skills, so that you expose specific standard and custom fields.

EDITIONS

Available in: Salesforce Classic

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



I've been at AW Computing since March 2011 in a number of different roles across sales and industry enablement. I am currently an AE for Healthcare solutions reporting to Alicia Burton in San Francisco. In my free time, I enjoy running, hiking, and spending time with my family.

Administrators can change object permissions for the skill and endorsement objects to suit the needs of their organization. For example, you can configure object settings so users can't create skills, and only skills created by an administrator can be assigned to others. By default, supported user profiles have the ability to see, create, edit, and remove skills, and administrators have "Modify All Data" and "View All Data" permissions.

Additionally, administrators can change some skills settings on the Work.com Settings page. From Setup, enter *`Work.com Settings`* in the `Quick Find` box, then select **Work.com Settings**.

Edit Skills and Endorsements via record detail pages

Disables inline editing of skills and endorsements on Chatter profiles. Recommended if you have customized these objects with custom required fields.

Note: Don't enable this setting if you want to use skills in Chatter profiles.

Generate feed posts when users add a new skill

Automatically creates a Chatter feed post when a user adds a new skill to a profile.

Enable Suggested Skills

Automatically suggests skills based on users' Chatter topics.

You can also install a package with additional reports and dashboards for thanks and skills features:

- Thanks and Skills Reports and Dashboards (Production Package)
- Thanks and Skills Reports and Dashboards (Sandbox Package)

SEE ALSO:

Skills Limitations

Enable or Disable Work.com Settings

Work.com Report and Dashboard Overview

Skills Limitations

EDITIONS

Available in: Salesforce Classic

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

Skills and endorsements have special behaviors and limitations.

Note the following restrictions:

- The Skills feature is not supported in Communities.
- All skill records are visible to users with the “Read” permission on Skills.
- Skill User and Endorsement records can only be deleted by the owner and users with the “Modify All Data” permission.
- To restore the users and endorsements associated with a deleted skill, retrieve the skill from the recycle bin. Creating a skill with the same name will not restore the prior associations.
- Users can only endorse others, not themselves. Users can’t be endorsed more than once by the same person on the same skill.

  Administrators can endorse users on behalf of other users through the API.
- Users can’t see the skills widget on a Chatter profile page unless Chatter is enabled and users have the “Read” permission on Skills and Skill Users.

SEE ALSO:

Skills Customization

Enable or Disable Work.com Settings

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Index