Sell to Your Customers

User Guide, Spring '16

@salesforcedocs

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SELL TO YOUR CUSTOMERS

Increase Your Sales Success with Salesforce

Ready to get more successful at selling to customers? Learn about Salesforce core sales features and sales productivity features.

Core Sales Features

Manage the basics: the people that you sell to, the products and services that you offer, and more.

- Accounts
- Contacts
- Leads
- Campaigns
- Opportunities
- Products and Price Books
- Social Network Integration
- Enterprise Territory Management
- Collaborative Forecasts
- Data.com

Sales Productivity Features

Enhance your Salesforce experience by tracking events, communicating to customers via email, and more.

- Home
- Notes
- Activities
- Events and Calendars
- Tasks
- Salesforce Email
- Microsoft® Email Integration for Office 365™
- Work.com

Managing the People and Organizations You Sell To

Establishing Your Customers, Competitors, and Partners

Accounts

Use Salesforce accounts to store information about your customers or the entities you are working with, such as companies, schools, government agencies, or individuals.

Think of an account as a file folder in which you store every bit of information you know about a customer. For example, if you're storing information about a company, you include its name, location, a contact person, past or current orders, and other related information. You could also keep a log of phone calls or service requests.

In Salesforce, information about the company itself—its name, location, website, and so on—is stored as an *account record*. Information related to the account, such as a contact person, notes, and orders, is stored in other types of records. Salesforce makes it easy to find all the records related to each account by listing them on the account record's home page. You can locate, create, delete, sort, and filter your accounts from the Accounts tab. Select an account to view its record home page, to edit the account, and access other records related to that account.

There are a few things to know about 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

Salesforce Offers Two Types of Accounts

Salesforce accounts are *business accounts* by default. Business accounts are used to store information about companies or other entities. Salesforce administrators can also choose to set up *person accounts*, which are used to store information about individual people. For example, person accounts fit your customers best if they are online shoppers, gym members, vacation travelers, or other individual consumers. Depending on who your company sells to, you might have just one type of account available, or both.

Note: In the Salesforce Help and other documentation, the word *account* by itself always refers to both business accounts and person accounts. We use the terms *business accounts* and *person accounts* when there are differences between the two types of accounts.

The Accounts Feature Can Be Renamed

Your Salesforce administrator can change the name of accounts to something that works better for your business, such as *Clients* or *Patients*. However, we will always refer to them as *accounts* in the Salesforce Help.

Users Can Access Accounts on Mobile Devices

Your accounts are accessible to you from the full Salesforce site or the Salesforce1 mobile application, if your Salesforce administrator has turned on Salesforce1 access.

Accounts Can Be Linked to Social Networks and News

Additional information and updates about your accounts are available if your company uses the Social Accounts, Contacts, and Leads; Account Insights; or Data.com Clean features.

SEE ALSO:

Social Accounts, Contacts, and Leads

Account Teams

Manage Email and Templates in Lightning Experience

Manage Work and View Past Activity in Lightning Experience

Social Accounts, Contacts, and Leads

What Is a Person Account?

Person accounts store information about individual consumers.

Note: This release contains a beta version of person accounts in Lightning Experience that is production quality but has known limitations. For information on enabling person accounts for your organization, see Enable Person Accounts.

Salesforce accounts are *business accounts* by default. Business accounts are used to store information about companies or other entities. Salesforce administrators can also choose to set up *person accounts*, which are used to store information about individual people. For example, person accounts fit your customers best if they are online shoppers, gym members, vacation travelers, or other individual consumers. Depending on who your company sells to, you might have just one type of account available, or both.

Person accounts work differently than business accounts. For example, person accounts can't have contacts. Instead, the person account record stores the information you'd typically save for business contacts, such as first name and last name. You can usually treat a person account like a contact. For example, you can invite a person account to a meeting, associate it with a campaign, or send a Stay-in-Touch request. For differences between person accounts and business accounts, see Person Account Behaviors.

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

Note: In the Salesforce Help and other documentation, the word *account* by itself always refers to both business accounts and person accounts. We use the terms *business accounts* and *person accounts* when there are differences between the two types of accounts.

SEE ALSO:

Person Account Behaviors

Accounts

Considerations for Using Merge Fields for Person Accounts

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 documents and emails.

- If your organization uses person accounts, business account and person account fields are available as account merge fields. Account fields exclusive to person accounts, such as `Birthdate`, `Email`, and `Title` have "Account.Person" in their merge field names. For example, `{!Account.PersonBirthdate}`.
- You can use the merge field {!Account.IsPersonAccount} to determine whether you are working with a person account or a business account.
- Account fields that previously had unique names and labels may no longer be unique because some contact fields are displayed as part of the account object. These fields on the accounts page are identified by the person account icon ( ). Ensure that all custom account fields have field names and labels unique to your organization so that the merge field references the correct field. For more information, see What Is a Person Account? on page 3.

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.

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

SEE ALSO:

Accounts

Validation Rules for Person Accounts

Validation Rules for Person Accounts

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.

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. The list of available merge fields depends on the type of data that you're working with. This topic lists considerations for working with merge fields in validation rules with person accounts.

EDITIONS

Available in: Salesforce Classic

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

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

Tips

- To define a validation rule that applies only to person accounts, use the `IsPersonAccount` merge field. For example, `Account.City = "San Francisco"` verifies that a business or person account's city is San Francisco, while `IsPersonAccount ( Account.City = "San Francisco")` verifies that a person account's city is San Francisco.
- You must handle person account and business account names separately in account validation rules.
  - For business accounts, use the `Name` merge field.
  - For person accounts, use the `FirstName` and `LastName` merge fields.

- `Birthdate`, `Email`, and other fields that are only supported for person accounts are available as merge fields in account validation rules. When you use one of those merge fields, note that business account records will be processed as if those fields have blank values. For business account and person account fields, see Account Fields on page 13.

SEE ALSO:

Accounts

Considerations for Using Merge Fields for Person Accounts

What is a business account and how does it differ from a person account?

A business account is a company, corporation, firm, or other business entity to which you can associate multiple contacts. Business accounts are available in all Editions and have a folder icon ( ).

In Enterprise, Unlimited, Performance, and Developer Editions, your Salesforce organization can be enabled to use person accounts ( ), which are individual consumers who function simultaneously as accounts and contacts.

SEE ALSO:

Accounts

Person Account Behaviors

Person accounts are accounts that can also be used as contacts in many situations. However, there are key areas in which person accounts differ from business accounts or have unique considerations.

Note: This release contains a beta version of person accounts in Lightning Experience that is production quality but has known limitations. For information on enabling person accounts for your organization, see Enable Person Accounts.

Salesforce Functionality	Person Account Behavior
Account Merge	Person accounts can be merged only with other person accounts. See Merging Duplicate Accounts on page 27.
Account Quick Create	On the accounts home page, the fields in the Quick Create area are based on whether the default account record type set on your profile is a person account record type or a business account record type.
Accounts	Person accounts can't have relationships with other accounts or with contacts. They can't be included in account hierarchies.
Activities	Person accounts can be associated with events or tasks using either the `Name` or `Related To` fields. As with contacts, person accounts can be invited to events. For users to request a meeting with a person account, the `Email` field must be added to the Person Accounts page layout.
Campaigns	As with contacts, person accounts can be added to campaigns and have a Campaign History related list.

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

Salesforce Functionality	Person Account Behavior
Cases	On cases, person accounts can be entered in the `Account Name` field, the `Contact Name` field, or both.
Chatter Feed Tracking	When you follow person accounts, you follow the account fields, but not the contact fields.
Communities and Portals	As with contacts, person accounts can be enabled as users for customer communities and portals Person Accounts can't be enabled as users for partner communities and portals.
Contact Roles	As with contacts, you can associate person accounts to accounts, cases, contracts, and opportunities using the Contact Roles related list. Similarly, you can associate contacts to person accounts using the Contact Roles related list.
Contacts	Unlike business accounts, person accounts can't have relationships with contacts.
Custom Objects	Custom objects with relationships to either accounts or contacts can be added as related lists on person accounts.
Data.com	Person accounts aren't supported by Data.com Prospector or Data.com Clean.
Desktop Integration	Person accounts are supported by the following Salesforce integration features. • Salesforce App for Outlook • Salesforce for Outlook • Connect Offline Person accounts aren't supported by Exchange Sync.
Duplicate Management	Person accounts aren't supported by Data.com Duplicate Management.
Email	As with contacts, you can send individual emails and mass emails to person accounts.
ExactTarget	Person accounts are supported, but more configuration is required.
Field History	Account fields for person accounts can be tracked using the account field history settings, but contact fields for person accounts are configured on the contact field history settings page.
Fields	Most standard account and contact fields and all custom account and contact fields are available for person account page layouts. Some business account fields (such as `Parent Account` and `View Hierarchy`) and some contact fields (such as `Reports To`) are not supported for person accounts. See Person Account Fields. .
Icons	In Salesforce Classic, person accounts have a person icon ( ), while business accounts have a folder icon ( ). In Lightning Experience, person accounts have a person with building icon ( ), while business accounts have building icon ( ). The person account icon can be added to search results, list views, and lookup dialogs by adding the `Is Person Account` field to the appropriate search layout or list view.

Salesforce Functionality	Person Account Behavior
Import Wizards	Person accounts can be imported using the Import Wizard for Person Accounts.
Lead Conversion	Leads that don't have a value in the `Company` field are converted to person accounts. Leads that do have a value in the `Company` field are converted to business account.
List Views	Person accounts appear in all account and contact list views, except the Recent Contacts list on the Contacts home page. Quickly see which records are person accounts by adding the `Is Person Account` field to the list of fields to display. To include or exclude person accounts from a list view, add the `Is Person Account` field to the filter criteria.
Mobile Configurations for Salesforce Classic	Salesforce Classic Mobile Configurations that include the account object automatically deliver person accounts and business accounts to users' mobile devices. Person accounts can be excluded from the configuration's data set using the criteria "*`Is Person Account equals False`*." To mobilize only person accounts, use the criteria "*`Is Person Account equals True`*." If a mobile configuration includes accounts but not contacts, users assigned to that configuration will see a Contacts tab in the mobile client application, and the tab will contain person accounts.
Packaging	Person accounts components and attributes can be included in managed and unmanaged packages.
Page Layouts	Person accounts have their own page layouts that can include account and contact fields, account custom links, and account and contact related lists. Person accounts page layouts do not support the `Reports To` and `Parent Account` fields. See Person Account Fields.
Pardot	Person accounts are supported, but additional configuration is required.
Partners	You can use the Partners related list to relate person accounts to each other. We recommend that you rename the Partners related list to reflect how your person accounts are connected.
Process Builder	Creating or editing a person account triggers the Process Builder, if applicable.
Record Types	Administrators can configure multiple record types for person accounts. A person account can only be changed to another person account record type.
Renamed Tabs and Standard Fields	To customize the names of tabs and fields that display on person account records, administrators need to customize the account and contact tabs and fields.
Salesforce1	For organizations that have enabled person accounts and Salesforce1, person accounts can be created, accessed, and managed within Salesforce1 for most features.
Search	In Lightning Experience and Salesforce1, person accounts appear in both account and contact search results. In Salesforce Classic, person accounts appear only in account search results. To help users differentiate person accounts from business accounts in search results, administrators can add the `Is Person Account` field to the appropriate search layout.

Salesforce Functionality	Person Account Behavior
Self-Service Portal	As with contacts, person accounts can be enabled as users for your 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.
Sharing Settings	If you have enabled person accounts, the organization-wide default sharing for contacts is set to Controlled by Parent and is not editable. If your organization has customized your contact sharing settings and you want to enable person accounts, change your organization-wide default for contacts to Controlled by Parent, which removes all your contact sharing rules and manually shared contacts.
Social Accounts, Contacts, and Leads	As with contacts, you can link person accounts to social network profiles
Stay-in-Touch Requests	As with contacts, you can send individual and mass Stay-in-Touch requests to person accounts.
Storage	Person accounts count against both account and contact storage because each person account consists of one account as well as one contact.
Visual Workflow	Creating or editing a person account triggers flows created with Visual Workflow.
Workflow Rules	Creating or editing a person account triggers account workflow rules.

SEE ALSO:

What Is a Person Account?

https://help.salesforce.com/help/pdfs/en/salesforce_B2C_implementation_guide.pdf

Viewing Account Lists

The accounts list page displays a list of accounts in your current view.

- Click an account name to view the account details.
- Click **Edit** or **Del** next to an account name to edit or delete the account.
- If your organization uses person accounts and your current list view includes the field `Is Person Account`, the column heading for this field is the person account icon ( ) in Salesforce Classic. Click the person account icon in the header to sort person accounts at either the top or bottom of the list.

SEE ALSO:

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 view account lists:
- "Read" on accounts

To create business accounts:
- "Create" on accounts

To create person accounts:
- "Create" on accounts and contacts

Using Accounts

USER PERMISSIONS

To view accounts:	"Read" on accounts
To edit business accounts:	"Edit" on accounts
To edit person accounts:	"Edit" on accounts and contacts
To enable partner accounts:	"Manage External Users"
To disable partner accounts:	"Edit" on accounts AND "Manage External Users"
To disable Customer Portal accounts:	"Edit" on accounts AND "Edit Self-Service Users"

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

An *account* is an organization, company, or consumer that you want to track—for example, a customer, partner, or competitor.

- View and edit accounts.
- Use Social Accounts, Contacts, and Leads to view your accounts' social network profiles, see their level of influence in social media, and watch related YouTube videos.
- Find account-related information (such as contacts).
- Get Data.com contacts for an account.
- Clean account records with Data.com Clean.
- View account updates and comments using Chatter.
- Give Customer Portal users access to an account.
- Enable an account as a partner account.

SEE ALSO:

Accounts

Displaying and Editing Account Details

USER PERMISSIONS

To view accounts:	"Read" on accounts
To edit business accounts:	"Edit" on accounts
To edit person accounts:	"Edit" on accounts and contacts
To enable partner accounts:	"Manage External Users"
To disable partner accounts:	"Edit" on accounts AND "Manage External Users"
To disable Customer Portal accounts:	"Edit" on accounts AND "Edit Self-Service Users"

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

Once you have located an account on the Accounts home or list pages, click the account name to view the Account's detail page.

- Use inline editing to edit fields directly on the detail page. If inline editing isn't enabled, contact your administrator. Inline editing is available in Salesforce Classic only.
- To display the page in edit mode, click **Edit**, make your changes, and click **Save**.
- To save the current account and create another one in Salesforce Classic, click **Save & New**.
- To open a printable display of the record details, in the top-right corner of the page, click **Printable View**. The printable display is available in Salesforce Classic only.
- To enable an account as a partner account, click **Manage External Account** and choose **Enable as Partner**. Available only in Salesforce Classic if your company enabled a partner portal.

- To enable person accounts as Customer Portal users, click **Manage External User** and choose **Enable Customer User**. Available only in Salesforce Classic if your company has person accounts and a Customer Portal.

Note: As the owner of an account, you can normally view all data related to that account.

However, your administrator can set an option on your role that determines whether you can view opportunities that you do not own that are associated with your accounts.

Also, if your accounts are assigned to territories, your administrator can set options that determine whether users in that territory can view, edit, transfer, or delete your accounts.

SEE ALSO:

Account Fields

Accounts

Select and Change Profile Images for Accounts, Contacts, and Leads

Guidelines for Creating Accounts

Keep these guidelines and tips in mind when creating accounts.

- To create business accounts, you need "Create" permission on accounts. To create person accounts, you need "Create" permission on both accounts and contacts.
- If your organization uses record types, you might be prompted to choose a `Record Type` when creating an account. Different record types can have different fields and different picklist values.
- To specify that a business account is a subsidiary of another business account, fill in the `Parent Account` field. You can then view a hierarchy of account relationships. The `Parent Account` field isn't available for person accounts.
- Use the `Account Site` field to designate different locations of the same company. For example, Acme.com may have offices in Paris and London. Create two accounts, both called Acme.com, but with `Account Site` values of Paris and London, respectively.
- If your organization uses divisions, the division of a new account is automatically set to your default division, unless you manually select a different one.
- If your organization uses territory management, account assignment rules can automatically assign newly created accounts to territories. See Territory Management on page 164.

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

SEE ALSO:

Account Fields

Viewing Parent Accounts

Understanding What Happens when You Delete Accounts

Most accounts and their associated records can be deleted in one click—but some accounts can't be deleted until associations have been removed.

Important: If you can delete an account, you will see **Delete** as an option on the account's detail page and on its row on the account list page in both Salesforce Classic and Lightning Experience. If you don't see the delete option, you don't have permission to delete the account. Ask your Salesforce administrator for help.

Deleted accounts are moved to the Recycle Bin, along with these associated items.

Note: You can't access the recycle bin from Lightning Experience, but deleted items still go into it. Switch to Salesforce Classic temporarily to view or restore recycle bin items.

- Contacts
- Opportunities
- Contracts (if they're not activated)
- Activities
- Notes
- Attachments
- Portal roles and groups (if all portal users in the account are disabled.)
- Partner relationships
- Relationship group members

If you restore an account from the Recycle Bin, any related items are also restored except for:

- Relationship group members in some cases.
- Portal roles and groups. See Using Accounts on page 9.

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 view accounts:
- "Read" on accounts

To delete accounts:
- "Delete" on accounts

You can't delete an account if:

- You don't have the "Delete" permission on accounts
- You aren't the account's owner, above the account's owner in the organization role hierarchy; or an administrator
- The account is enabled as a partner account; it has associated cases, activated contracts, or related opportunities that are owned by other users; or it has associated contacts that are enabled for the Self-Service portal.

In addition, if you attempt to delete an account that has closed/won opportunities owned by you, a message displays asking you whether you want to delete the closed/won opportunities along with the account or to cancel the account deletion.

Note: You don't need the "Delete" permission on any associated records that are included in the deletion.

SEE ALSO:

Merging Duplicate Accounts

Accounts

Account Fields

Business Account Fields

A business account has the following fields, listed in alphabetical order. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

If the account record was added from Data.com, certain fields, as identified here, will be populated with the Data.com or Dun & Bradstreet (D&B) value, if a value is available. Some Data.com fields are available to only organizations that use a specific Data.com product. Those fields are identified in their descriptions.

Field	Description	Allows Value from Data.com or D&B
Account Currency	The default currency for all currency amount fields in the account. Amounts display in the account currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.	
Account Division	Division to which the account belongs. Records related to the account, such as contacts and opportunities, automatically inherit the account's division. Available only in organizations that use divisions to segment their data.	
Account Name	Name of company. Up to 255 characters are allowed in this field.	✔ (D&B)
Account Name (Local)	The name of the account translated into the local language.	
Account Number	Tracking or reference number for account. Up to 40 characters are allowed in this field.	
Account Owner	Assigned owner of account. Not available in Personal Edition.	
Account Record Type	Name of the field that determines what picklist values are available for the	

EDITIONS

Available in: Salesforce Classic and Lightning Experience

The available business account fields vary according to which Salesforce Edition you have.

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

The available person account fields vary according to which Salesforce Edition you have.

Field	Description	Allows Value from Data.com or D&B
	record. Available in Enterprise, Unlimited, Performance, and Developer Editions.	
`Account Site`	Information about the account's location, such as *`single location`*, *`Headquarters`*, or *`Branch`*. Up to 80 characters are allowed in this field.	✔ (D&B)
`Account Source`	The source of the account record. For example, *`Advertisement`*, *`Data.com`*, or *`Trade Show`*. The source is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	✔ (Data.com)
`Annual Revenue`	Amount of annual reported revenue. Note: If you clean your account records with Data.com Prospector or Data.com Clean, Data.com converts non-USD currencies to USD every month, which may cause the values in this field to change. For organizations that use non-USD currencies, we ignore the `Annual Revenue` field when determining a record's clean status (so the `Clean Status` field's value does not change). We also remove the value from the `Annual Revenue` field on account records and the clean comparison page.	✔ (D&B)
`Billing City`	City portion of billing address. Up to 40 characters are allowed in this field.	✔ (D&B)
`Billing Country`	Country portion of billing address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	✔ (D&B)
`Billing State/Province`	State or province portion of billing address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	✔ (D&B)
`Billing Street`	Street address used for billing. Up to 255 characters are allowed in this field.	✔ (D&B)

Field	Description	Allows Value from Data.com or D&B
`Billing Zip/Postal Code`	Zip or postal code portion of billing address. Up to 20 characters are allowed in this field.	✔ (D&B)
`Clean Status`	The record's clean status, as compared with Data.com. Values are `Not Compared`, `In Sync`, `Reviewed`, `Different`, `Not Found`, and `Inactive`. This field is available if you use Data.com Prospector or Data.com Clean. Note: If you clean your account records with Data.com Prospector or Data.com Clean, Data.com converts non-USD currencies to USD every month, which may cause the values in the `Annual Revenue` field to change. For organizations that use non-USD currencies, we ignore the `Annual Revenue` field when determining a record's clean status (so the `Clean Status` field's value does not change).	✔ (Data.com)
`Created By`	User who created the account, including creation date and time. (Read only)	
`Data.com Key`	The company's ID in Data.com. When Salesforce records are compared with Data.com records (via manual cleaning or automated clean jobs), if Data.com finds a match, the two records are linked by this field's numeric value.	✔ (Data.com)
`D&B Company`	A link to the corresponding D&B Company record, which displays Dun & Bradstreet (D&B) fields for the account. Use the lookup if you need to associate a different D&B Company record with the account. This field is only available to organizations that use Data.com Premium Prospector or Data.com Premium Clean.	✔ (D&B)
`Description`	Description of account. Up to 32 KB of data are allowed in this field. Only the first 255 characters display in reports.	✔ (D&B)
`D-U-N-S Number`	The Data Universal Numbering System (D-U-N-S) number is a unique, nine-digit	✔ (D&B)

Field	Description	Allows Value from Data.com or D&B
	number assigned to every business location in the D&B 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. This field is available if you use Data.com Prospector or Data.com Clean. Note: To see the entire D-U-N-S number, either • Add the account to Salesforce if you haven't yet, or • Clean the account with Data.com if it already exists in Salesforce Until you add or clean the record, its first five digits will be masked with asterisks (*).	
Employees	Number of people employed by the account.	✔ (D&B)
Evaluate this account against territory rules on save	When checked, causes account assignment rules to run when the account is edited and saved. When customizing the page layout for accounts, an administrator can control whether this checkbox displays and whether it is checked by default. See Territory Management on page 164.	
Exclude from territory assignment rules	When checked, shields the account from being evaluated when account assignment rules are run, preventing it from being automatically assigned to territories. Also, if the account is already assigned to territories as a result of assignment rules, checking this box removes the account from those territories. This checkbox only affects rule-based account assignments and has no effect on manual account assignments. See Territory Management on page 164.	
Fax	Fax number. Up to 40 characters are allowed in this field.	✔ (D&B)
Industry	Primary business of account. Entry is selected from a picklist of available values,	✔ (Data.com)

Field	Description	Allows Value from Data.com or D&B
	which are set by an administrator. Each picklist value can have up to 40 characters.	
Modified By	User who last changed the account fields, including modification date and time. This does not track changes made to any of the related list items on the account. (Read only)	
NAICS Code	The six-digit North American Industry Classification System (NAICS) code is the standard used by business and government to classify business establishments into 20 industries, according to their economic activity for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. This field is available if you use Data.com Prospector or Data.com Clean.	✔ (D&B)
NAICS Description	A brief description of an organization's line of business, based on its NAICS code. This field is available if you use Data.com Prospector or Data.com Clean.	✔ (D&B)
Ownership	Ownership of company, for example, public or private. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	✔ (D&B)
Parent Account	Parent company for companies that are subsidiaries of a larger company or organization. The parent account must be an existing account in Salesforce. You can enter the account name, or select (or optionally, create) the account using the lookup icon.	
Partner Account	Read-only field that indicates whether an account is a partner account.	
Phone	Primary phone number of account. Up to 40 characters are allowed in this field.	✔ (D&B)
Rating	Categorization of how you rate this account, for example, Hot, Cold. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	

Field	Description	Allows Value from Data.com or D&B
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed in this field.	✔ (D&B)
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	✔ (D&B)
Shipping State/Province	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	✔ (D&B)
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed in this field.	✔ (D&B)
Shipping Zip/Postal Code	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed in this field.	✔ (D&B)
SIC Code	Standard Industrial Classification code of the account's main business categorization. Up to 10 characters are allowed in this field.	✔ (D&B)
SIC Description	A brief description of an organization's line of business, based on its SIC code.	✔ (D&B)
Territories	The territories to which the account has been assigned. See Territory Management on page 164. For organizations that use Enterprise Territory Management, this field is not available. Enterprise Territory Management offers a related list called Assigned Territories that you can add to account page layouts.	
Ticker Symbol	The abbreviation used to identify publicly traded shares of a particular stock. Also known as the stock symbol. Up to 20 characters are allowed in this field.	✔ (D&B)
Tradestyle	A name, different from its legal name, that an organization may use for conducting business. Similar to "Doing business as" or	✔ (D&B)

Field	Description	Allows Value from Data.com or D&B
	"DBA". This field is available if you use Data.com Prospector or Data.com Clean.	
Type	Type of account, for example, Customer, Competitor, or Partner. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Custom Links	Listing of custom links for accounts as set up by your administrator.	
Website	URL of account's website, for example, www.acme.com. Up to 255 characters are allowed in this field; only the first 50 are displayed.	✔ (Data.com)
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.This field is available if you use Data.com Prospector or Data.com Clean.	✔ (D&B)

Person Account Fields

A person account has the following standard fields, listed in alphabetical order. Depending on your page layout and field-level security settings, some fields may not be visible or editable. Fields with a checkmark in the Is Contact Field column are contact fields that are supported for person accounts but not business accounts.

Note that this list does not include any custom fields that your administrator may have created. Both account and contact custom fields are available for person accounts.

Field	Description	Is Contact Field
Account Currency	The default currency for all currency amount fields in the account. Amounts display in the account currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.	
Account Division	Division to which the account belongs. Records related to the account, such as contacts and opportunities, automatically inherit the account's division. Available only	

Field	Description	Is Contact Field
	in organizations that use divisions to segment their data.	
`Account Name`	The name of the individual. In person accounts, the account name cannot be edited directly. Instead, Salesforce derives it by combining the `First Name` and `Last Name` fields in the appropriate order per the user's language setting. If `Middle Name` and `Suffix` fields have been enabled for the organization, those fields are also included in the account name.	
`Account Name (Local)`	The name of the account translated into the local language.	
`Account Number`	Tracking or reference number for account. Up to 40 characters are allowed in this field.	
`Account Owner`	Assigned owner of account. Not available in Personal Edition.	
`Account Record Type`	Name of the field that determines what picklist values are available for the record. Available in Enterprise, Unlimited, Performance, and Developer Editions.	
`Account Site`	Information about the account's location, such as *`single location`*, *`Headquarters`*, or *`Branch`*. Up to 80 characters are allowed in this field.	
`Annual Revenue`	Amount of annual reported revenue.	
`Assistant`	The contact's assistant. Maximum 40 characters.	✔
`Asst. Phone`	The assistant's phone number. Maximum 40 characters.	✔
`Billing City`	City portion of billing address. Up to 40 characters are allowed in this field.	
`Billing Country`	Country portion of billing address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	
`Billing State/Province`	State or province portion of billing address. Entry is selected from a picklist of standard values, or entered as text. Up to 80	

Field	Description	Is Contact Field
	characters are allowed if the field is a text field.	
`Billing Street`	Street address used for billing. Up to 255 characters are allowed in this field.	
`Billing Zip/Postal Code`	Zip or postal code portion of billing address. Up to 20 characters are allowed in this field.	
`Birthdate`	The contact's birthday. Click the field, and then choose a date from the calendar.	✔
`Created By`	User who created the account, including creation date and time. (Read only)	
`Custom Links`	Listing of custom links for accounts as set up by your administrator.	
`Department`	The associated business or organizational unit. Maximum 80 characters.	✔
`Description`	Description of account. Up to 32 KB of data are allowed in this field. Only the first 255 characters display in reports.	
`Do Not Call`	Whether the contact wants to be contacted by phone. If you use Data.com, the `Phone` field value is hidden from search results and on the Contact Card, and it's blank in `.csv` files that are created when you export records.	✔
`Email`	The contact's email address. A valid email address is required. Maximum 80 characters.	✔
`Email Opt Out`	Whether the contact wants to receive email. If you use Data.com, the `Email` field value is hidden from search results and on the Contact Card, and it's blank in `.csv` files that are created when you export records.	✔
`Employees`	Number of people employed by the account.	
`Evaluate this account against territory rules on save`	When checked, causes account assignment rules to run when the account is edited and saved. When customizing the page layout for accounts, an administrator can control whether this checkbox displays and whether it is checked by default. See Territory Management on page 164.	

Field	Description	Is Contact Field
Exclude from territory assignment rules	When checked, shields the account from being evaluated when account assignment rules are run, preventing it from being automatically assigned to territories. Also, if the account is already assigned to territories as a result of assignment rules, checking this box removes the account from those territories. This checkbox only affects rule-based account assignments and has no effect on manual account assignments. See Territory Management on page 164.	
Fax	Fax number. Up to 40 characters are allowed in this field.	
Fax Opt Out	Whether the contact wants to be included in broadcast faxes.	✔
First Name	The first or given name of the individual. Up to 40 characters are allowed in this field.	✔
Home Phone	The contact's home phone number. Maximum 40 characters.	✔
Industry	Primary business of account. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Last Name	The surname or family name of the individual. Up to 80 characters are allowed in this field.	✔
Last Stay-in-Touch Request Date	The date when the most recent Stay-in-Touch request was sent.	✔
Last Stay-in-Touch Save Date	The date when the most recent Stay-in-Touch request was returned and merged.	✔
Lead Source	The record source: for example, Advertisement, Partner, or Web. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters for each picklist value.	✔
Mailing City	The city in the mailing address. Maximum 40 characters.	✔
Mailing Country	The mailing country for the address. Entry is selected from a picklist of standard values,	✔

Field	Description	Is Contact Field
	or entered as text. Up to 80 characters are allowed if the field is a text field.	
`Mailing State/Province`	The mailing state or province for the address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	✓
`Mailing Street`	The street in the mailing address. Maximum 255 characters.	✓
`Mailing Zip/Postal Code`	The zip or postal code in the mailing address. Maximum 20 characters.	✓
`Middle Name`	Middle name of the individual. Up to 40 characters are allowed for this field. Note: To enable this field, contact Salesforce Customer Support. Next, from Setup, enter *`User Interface`* in the `Quick Find` box, then select **User Interface**. Then select `Enable Name Suffixes for Person Names`.	✓
`Mobile`	The contact's mobile phone number. Maximum 40 characters.	✓
`Modified By`	User who last changed the account fields, including modification date and time. This does not track changes made to any of the related list items on the account. (Read only)	
`Other City`	The city in another address for the contact. Maximum 40 characters.	✓
`Other Country`	Another country for the address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	✓
`Other Phone`	Another phone number for the contact. Maximum 40 characters.	✓
`Other State/Province`	Another state or province for the address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	✓

Field	Description	Is Contact Field
Other Street	The street address in another address for the contact. Maximum 255 characters.	✔
Other Zip/Postal Code	The zip or postal code in another address for the contact. Maximum 20 characters.	✔
Ownership	Ownership of company, for example, public or private. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Phone	Primary phone number of account. Up to 40 characters are allowed in this field.	
Rating	Categorization of how you rate this account, for example, Hot, Cold. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Salutation	The title for addressing the contact, for example, Mr., Ms., or Dr. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters.	✔
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed in this field.	
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	
Shipping State/Province	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed in this field.	
Shipping Zip/Postal Code	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed in this field.	

Field	Description	Is Contact Field
SIC Code	Standard Industrial Classification code of the account's main business categorization. Up to 10 characters are allowed in this field.	
Suffix	Name suffix of the individual. Up to 40 characters are allowed for this field. Note: To enable this field, contact Salesforce Customer Support. Next, from Setup, enter *User Interface* in the Quick Find box, then select **User Interface**. Then select Enable Name Suffixes for Person Names.	✔
Territories	The territories to which the account has been assigned. See Territory Management on page 164.	
Ticker Symbol	The abbreviation used to identify publicly traded shares of a particular stock. Also known as the stock symbol. Up to 20 characters are allowed in this field.	
Title	The contact's position within the organization. Maximum 80 characters.	✔
Type	Type of account, for example, Customer, Competitor, or Partner. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Website	URL of account's website, for example, www.acme.com. Up to 255 characters are allowed in this field; only the first 50 are displayed.	

SEE ALSO:

Accounts

Account History

The Account History related list of an account detail page tracks the changes to the account. Any time a user modifies any of the standard or custom fields whose history is set to be tracked on the account, a new entry is added to the Account History related list. For person accounts, this includes any relevant contact fields that are set to be tracked. All entries include the date, time, nature of the change, and who made the change. Modifications to the related lists on the account are not tracked in the account history.

SEE ALSO:

Accounts

EDITIONS

Available in: Salesforce Classic

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

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

USER PERMISSIONS

To view accounts:
- "Read" on accounts

Viewing Parent Accounts

The account hierarchy shows you the accounts that are associated through the `Parent Account` field, giving you a global view of a company and its subsidiaries. In the hierarchy, accounts are indented to show that they are subsidiaries of the parent account above them.

- To view the account hierarchy, click **View Hierarchy** next to the account name on the account detail page. The Account Hierarchy page displays up to 500 child accounts. If you don't have access to certain accounts that appear on the Account Hierarchy page, the columns for those accounts won't display details.
- To list an account as a subsidiary, edit the subsidiary account and type the name of an existing account in the `Parent Account` field. Alternatively, you can click the lookup icon to search for (or optionally, create) a parent account.

The parent account must be an existing account before it can be entered and saved in this field.

For companies with multiple office locations, you can also use the `Account Site` field to distinguish among the locations.

If your organization uses divisions, accounts that are associated via the `Parent Account` field do not need to be in the same division.

The `Parent Account` field and the **View Hierarchy** link are not supported for person accounts.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view accounts:
- "Read" on accounts

To view parent accounts:
- "Read" on accounts

SEE ALSO:

Account Fields

Guidelines for Creating Accounts

Merging Duplicate Accounts

1. From the Accounts tab, click **Merge Accounts** in the Tools section.
2. Enter a search string to find the duplicate accounts.

   For example, you can enter **tech* to find duplicate accounts listed as "Ecotech" and "Ekotech." Do not use the local name for the account. Then click **Find Accounts**.
3. Check the rows of up to three accounts you want to merge. Click **Next**.
4. Select one account as the "Master Record." Any data in hidden or read-only fields will be taken from the Master Record. If you have "Edit Read Only Fields" permission, you can manually select which read-only fields to retain.
5. Select the fields that you want to retain from each record.

   When there is conflicting data, the fields in the left column are preselected and the row is marked in blue.
6. Click the **Merge** button to complete the merge.

EDITIONS

Available in: Salesforce Classic

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

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

USER PERMISSIONS

To view accounts:
- "Read" on accounts

To merge business accounts:
- "Delete" on accounts

To merge person accounts:
- "Delete" on accounts

  AND

  "Read" on contacts

Guidelines for Merging Accounts

- You can merge accounts if you are an administrator, the account owner, or a user above the account owner in the role hierarchy and you have the appropriate user permissions.
- When merging two accounts that you do not own, you must have "Delete" permissions on accounts and "Edit" permissions on opportunities and cases. You need "Delete" permissions on accounts because you are deleting one of the accounts when you perform an account merge. You need "Edit" permissions on opportunities and cases because changing the account name field (`AccountID`) edits any opportunities or cases that are associated with the accounts you are merging.
- Any related items from any of the duplicate accounts will be associated with the newly merged account.
- In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, any sharing rules are applied to the newly merged account. Also, any manual sharing from the "Master Record" is applied to the merged account.
- All discarded duplicate records are moved to the Recycle Bin.
- When you merge accounts that have territories and the `Exclude from account assignment rules` box was deselected on both of the original accounts, account assignment rules will run on the new account to determine its territories. Also, any manually added territories on the original accounts will be manually added to the new account.
- When you merge accounts that have territories and the `Exclude from account assignment rules` box was checked on one or both of the original accounts:
  - The newly merged account has all of the territories of the original accounts.
  - Account assignment rules will not run on the newly merged account.
  - If a territory was assigned to one of the original accounts based on account assignment rules, it will appear as having been assigned to the new account based on rules even if the new account does not match the rules.
  - If a territory was manually assigned to one of the original accounts, it will be manually assigned to the new account.
  - If a territory was added to one account manually and to the other account by rules, it will be manually added to the new account.

Guidelines for Merging Accounts with Team Members

- If both accounts have different account teams, the merged account will contain members from both account teams.
- If account team members have a greater access level, you must have the "Modify All Data" permission on accounts to merge those accounts. For example, if you're the account owner who's merging the accounts but an account team member has more access than you on any account child records, you'll need the "Modify All Data" permission to merge those accounts.

Guidelines for Merging Person Accounts

- If your organization uses person accounts, both business accounts and person accounts are returned when you search for duplicates. However, you cannot merge a person account with a business account or vice versa. Person accounts are indicated by the person account icon ( ).
- You can't merge person accounts enabled to use a Customer Portal.

Guidelines for Merging Accounts Associated with Portals

- You must have the "Manage Users" permission to merge accounts associated with portals.
- You can merge accounts that have contacts associated with the same type of portal. For example, you can merge accounts that have contacts associated with a partner portal or Customer Portal, but you cannot merge an account that has contacts associated with a partner portal with an account that has contacts associated with a Customer Portal.

  When you merge accounts that have contacts associated with multiple portals of the same type, a contact's access to a specific portal does not change. This is because a portal user's profile determines the portal he or she can access.
- When merging a partner account with a non-partner account, the partner account must be the master.
- When merging partner accounts with a non-partner account, the owner cannot be changed.
- To ensure that merged accounts will include contacts associated with a portal, select the account with portal users as the master record during the merge process.

Guidelines for Merging Accounts Assigned to Territories with Territory Management 2.0

When you merge accounts that have territories:

- Any manually assigned territories (for models in all states) on the original accounts will be manually added to the merged account if the merged account is not already associated with them.
- Account assignment rules will run on the merged account for the active territory model only if you select the *`Select by default`* checkbox for the `Evaluate this account against territory rules on save checkbox` on the applicable account page layout's layout properties.
- If the merged value of `Exclude from territory assignment rules` = `true`, then: 1) territory assignment rules are not evaluated even if the *`Select by default`* checkbox for the `Evaluate this account against territory rules on save checkbox` is selected on the applicable account page layout's layout properties; and 2) any existing rule based territory associations in the active model are removed from the merged account.
- For territory models in non-active states (`Planning` or `Archived`), rule-based associated territories will not change on the merged account even if the merged account field values do not match the rules.

Sharing Accounts

Your administrator defines your organization's sharing model as well as your organization's default account access levels for territories. However, you can extend sharing privileges for your own data on an account-by-account basis. You can use account sharing to increase access to your accounts; you cannot restrict access beyond your organization's default access levels.

To view and manage sharing details, click **Sharing** on the account detail page. The Sharing Detail page lists the users, groups, roles, and territories that have sharing access to the account. On this page, you can do any of the following:

- Click **Add** to grant access to the record for other users, groups, roles, or territories.

  Note: When you share an account, Salesforce prompts you to share any related contacts, opportunities, or cases, up to and including your access level. Enterprise, Unlimited, Performance, and Developer Edition users can also share related records from the record detail pages. Ensure users have at least "Read" permission on shared records.

  Alternatively, you can share account access by creating an account team.
- Click **Expand List** to view all users that have access to the record.
- 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. For accounts, you can also edit the "Owner" sharing rule.

EDITIONS

Available in: Salesforce Classic

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

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

SEE ALSO:

Territory Management

Account Teams

Record Translated Names

Use local name fields to store translated names for accounts, contacts, or leads.

For example, you can store the name of an account in the default language of your organization as well as the account's or user's language. The following fields can have corresponding local names:

Standard Field	Local Name Field
Account Name	Account Name (Local)
Contact: First Name	Contact: First Name (Local)
Contact: Middle Name	Contact: Middle Name (Local)
Contact: Last Name	Contact: Last Name (Local)
Lead: Company	Lead: Company Name (Local)
Lead: First Name	Lead: First Name (Local)
Lead: Middle Name	Lead: Middle Name (Local)
Lead: Last Name	Lead: Last Name (Local)

EDITIONS

Available in: Salesforce Classic

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

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

Local names do not affect the user's language settings. Depending on your page layout settings, they can both be displayed on the detail or edit page.

SEE ALSO:

Accounts

Changing the Territories of an Account

To modify an account's manually assigned territories:

1. From the account detail page, click **Change** next to the `Territories` field.
2. At the `Rule-based territory assignments` list, view the territories that contain the account due to active account assignment rules. You cannot use this page to remove the account from these territories; to do so you must modify the account assignment rules that evaluated the account.
3. If the account has existing manual assignments to one or more territories, the names of those territories will appear in the `Selected territories` list.
4. Click **Select** and **Deselect** to move territories between the Available territories list and the Selected territories list.
5. Optionally, click **Horizontal View** or **Vertical View** in the drop-down list to place the Selected territories list either alongside or below the Available territories list.
6. When the Selected territories list contains the territories to which the account should be manually assigned, click **Save** to finish and return to the account detail page.

SEE ALSO:

Territory Management

EDITIONS

Available in: Salesforce Classic

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

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

USER PERMISSIONS

To change the territories of an account:

- "Manage Territories"

  OR

  You are a forecast manager. Forecast managers can manage territories of those users working below them in territory hierarchy.

Change a Record's Owner

You can give ownership of a record to another user as long as that user has at least "Read" permission for the type of record being transferred.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To transfer single records:
- "Transfer Record"

1. On the record detail page, click the link to change the owner.

   If you don't see the link, you don't have permissions to change record ownership.

2. Enter or select a new owner. In organizations where the Salesforce Customer Portal or partner portal is enabled, you can filter the results that appear on the user lookup dialog by selecting either a queue or group of users from the `Owner` or `Assigned To` drop-down list.

   Note: You can only enter or select users who have permission to own the record. Neither the User group nor the Roles and Internal Subordinates group contains Customer Portal or partner users.

3. Select the `Send Notification Email` checkbox to notify the new owner.

   The "From" email address displayed in the notification is your return email address set in your email settings.

   For cases in Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, the email text is determined by the `Case Assigned Template` setting specified in the Support Settings. For other records, the email text is automatically generated and cannot be customized.

4. Depending on the type of object you are transferring and your user permissions, the following checkboxes may also appear:

Checkbox	Description	Appears For
`Change Division`	Transfers the record to the new owner's division. All records related to the account are transferred to the new division as well.	Accounts and leads in Salesforce Classic, if you can view or edit the `Division` field
`Transfer open opportunities not owned by the existing account owner` or `Transfer open opportunities not owned by you`	Transfers open opportunities owned by other users that are associated with the account.	Accounts in Lightning Experience Accounts in Salesforce Classic
`Transfer closed opportunities`	Transfers the closed opportunities associated with the account. This option applies only to closed opportunities owned by the account owner; closed opportunities owned by other users are not changed.	Accounts in Salesforce Classic
`Transfer open cases owned by the existing account owner`	Transfers any open cases associated with the account that are owned by the existing account owner.	Accounts in Salesforce Classic
`Transfer closed cases`	Transfers the closed cases associated with the account. This option applies only to closed cases owned by the account owner; closed cases owned by other users are not changed.	Accounts in Salesforce Classic

Checkbox	Description	Appears For
`Keep Account Team`	Transfers all account team members on the account to the new owner.	Accounts in Salesforce Classic
`Keep Opportunity Team`	Preserves the opportunity team when the opportunity is transferred to the new owner. Any opportunity splits are preserved, and split percentages assigned to the previous owner transfer to the new one. If this box is unchecked, all opportunity team members and splits are deleted when the opportunity is transferred. Note: If you transfer closed opportunities, the opportunity team is maintained, regardless of this setting.	Accounts in Salesforce Classic Opportunities in Salesforce Classic

Note: If you change an account owner with both `Transfer closed opportunities` and `Keep Opportunity Team` deselected, the opportunity team members' access for closed opportunities becomes Private (that is, the opportunity team members lose access to any closed opportunities).

5. Save your owner changes.

Example: After you change a record's owner, the previous owner's visibility reverts to the default sharing setting unless that user is on an account or opportunity team. For example, if the previous owner of an account is on an account team, that user has Read Only or the access specified in your organization-wide default for accounts, whichever is greater. The previous owner's access to related records remain the same. This behavior is the same for opportunity owners that are members of an opportunity team as long as you change ownership using the API. When you change ownership of an opportunity within Salesforce, you can select the access level you want.

SEE ALSO:

Transfer of Associated Items

Transfer of Associated Items

When you change a record's owner, some of it's associated records may also be transferred to the new owner.

Important: Workflow rules that update owners *do not* also transfer associated items. To ensure transfer, click **Change** next to the owner's name in a record and make your transfer selections.

Record Type	Associated items that are also transferred
Accounts	Contacts, contracts with `Draft` status, attachments, notes, open activities, and orders with `Draft` status that are either associated with a transferring contract or no contract. Depending on your selections, this can also include open opportunities not owned by the current account owner, closed opportunities, open cases owned by the existing account owner, and closed cases.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Record Type	Associated items that are also transferred
	When a partner account is transferred, partner users associated with that account are moved into the role hierarchy beneath the new owner. Contracts and orders with `Activated` status are not transferred to the new owner, however, the new owner has read-only access to these contracts and orders.
Contacts	Notes, attachments, and open activities
Orders	Open tasks and future events (only applies if neither the old nor new owner is a queue)
Opportunities	Notes, attachments, and open activities
Leads	Notes, attachments, and open activities. Open activities are not transferred if you change lead ownership using the `Assign using active assignment rule` checkbox.
Cases	Notes, attachments, and open activities
Campaigns	Attachments and open activities
Contracts	Notes, attachments, open activities, and orders with `Draft` status
Custom objects	Notes, attachments, and open activities

Note: You can't transfer events to which you have been invited and don't own.

SEE ALSO:

Change a Record's Owner

Finding Account-Related Information (Related Lists)

USER PERMISSIONS

To view accounts:	"Read" on accounts
To edit business accounts:	"Edit" on accounts
To edit person accounts:	"Edit" on accounts and contacts
To enable partner accounts:	"Manage External Users"
To disable partner accounts:	"Edit" on accounts AND "Manage External Users"
To disable Customer Portal accounts:	"Edit" on accounts AND "Edit Self-Service Users"

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

Related lists, such as opportunities, display information related to an account.

- Hover over the links at the top of a detail page to display the corresponding related list and its records. If Chatter is enabled, hover links display below the feed. An interactive overlay allows you to quickly view and manage the related list items. Click a hover link to jump to the content of the related list. If hover links are not enabled, contact your Salesforce administrator.
- If hover details are enabled, hover over any lookup field on the detail page to view key information about a record before clicking into that record's detail page.
- To directly add new items, click **New** (or the equivalent button) at the top of a related list. For example, to add a task to the Open Activities related list, click **New Task**.
- To change the number of records shown for related lists, click **View More** below a related list, or click **fewer** or **more** at the bottom of the page.
- If you are unable to see related records that belong to portal users, contact your Salesforce administrator.

Viewing Related Lists

What related lists you see are determined by several things.

- The Salesforce edition you are using
- Whether you are using Salesforce Classic or Lightning Experience
- Whether you are viewing a business account or a person account
- Your personal customization
- Page layout customizations set by your Salesforce administrator
- Your permissions to view related data

SEE ALSO:

Accounts

Working Together on Accounts

Account Teams

An account team is a team of users who work together on an account. For example, an account team can include an executive sponsor, dedicated support representative, and project manager. Using account teams makes it easy to track collaboration on accounts.

Account teams aren't the same as opportunity teams, although they have the same team member roles.

You can build an account team for each account that you own. When selecting an account team member, specify the role that the person plays on the account. Depending on your sharing model, you can specify each account team member's level of access to the account and any contacts, opportunities, or cases associated with that account. That way, you can give some team members read-only access and others read/write access.

EDITIONS

Available in: Salesforce Classic

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

You can set up a default account team that includes the people who you normally work with on your accounts. You can choose to automatically add this default account team to all your accounts.

In a custom list view, you can filter account lists by the account teams in which you are a member. When creating or editing a custom list view for accounts, select the `My Account Teams` filter. In account reports, you can filter accounts by the account teams in which you are a member.

SEE ALSO:

Set Up Account Teams

Setting Up Default Account Teams

Accounts

Set Up Account Teams

Your users can add account team members to accounts. Similar to opportunity teams on opportunities, account teams are teams of users who work together on accounts.

To access the Account Team Setup page, from Setup, enter *`Account Teams`* in the `Quick Find` box, then select **Account Teams**. On the Account Team Setup page, click the appropriate links to perform the following actions.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable account teams:
- "Customize Application"

To set up team roles:
- "Customize Application"

Defining Team Roles

Every member of an account team has a role that he or she plays for the account, for example, "Account Manager" or "Project Manager." You can customize the account team roles for your organization:

1. Click **Team Roles**.
2. Edit the existing entries or add new items.
3. Click **Save**.

Replacing Team Roles

If you have changed your team roles and want to update all existing records, click **Replace Team Roles** to globally replace the picklist values in all existing records.

Note: Account teams share roles with the opportunity teams on opportunities. If you remove an account team role, that role will no longer be listed as an opportunity team role.

Enabling or Disabling Account Teams

To enable or disable account teams:

1. Click **Enable Account Teams** or **Disable Account Teams**.
2. Select or deselect the `Account Teams Enabled` checkbox and click **Save**. Enabling account teams gives your users access to create and use account teams on accounts.
3. If you are enabling account teams, select the account page layouts that should include the new Account Team related list and click **Save**.

Note: Disabling account teams removes all account teams from all accounts and removes the Account Team related list from all page layouts.

In addition, you cannot disable account teams for your organization if team members are referenced in Apex. For example, if Apex code references the `Team Member` field (represented as `AccountTeamMember` in the code), account teams cannot be disabled.

SEE ALSO:

Account Teams

Setting Up Default Account Teams

Setting Up Default Account Teams

Account teams aren't the same as opportunity teams, although they have the same team member roles.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up default account teams:

- "Read" on opportunities

To add default account teams to accounts:

- "Read" on accounts

  AND

  Owner of account record, or above owner in your organization's role hierarchy

Adding Default Account Team Members

1. From your personal settings, enter *`Advanced User Details`* in the `Quick Find` box, then select **Advanced User Details**. No results? Enter *`Personal Information`* in the `Quick Find` box, then select **Personal Information**.
2. Click **Add** in the Default Account Team related list.
3. Select users to add as members of your default account team.
4. Select the access levels that each member should have on the accounts you own and the contacts, opportunities, and cases related to those accounts.
5. Select an account team role for each member, for example, "Channel Manager."
6. Check the `Automatically add my default account team...` box to add your default account team to all accounts that you create and all accounts that are transferred to you.
7. Check the `Update account teams...` box to apply default account team changes to all of your existing accounts.
8. Click **Save**.

Editing and Deleting Default Account Team Members

To change the access levels or role of a default team member, click **Edit** next to the user's name in the Default Account Team related list.

To delete a user from your default account team:

1. Click **Del** next to the user's name in the Default Account Team related list.
2. Select **Remove this user...** to remove the user from your existing account teams.
3. Click **Delete** to finish.

To change or remove a default team member for a specific account, go to the Account Team related list on that account.

SEE ALSO:

Account Teams

Set Up Account Teams

Adding Account Team Members

An account record owner or users above the owner in the role hierarchy who have read access on the account can add team members but not edit them. If they have edit access on the account, they can also edit or delete team members.

A user who doesn't own the account record can add team members only if he or she has edit access on the record.

You can grant the team member a higher access to the record only if you are the owner of account record, or above the owner in your organization's role hierarchy.

Note: The **Account Access**, **Contact Access**, **Opportunity Access**, and **Case Access** options depend on your sharing model. In a Public sharing model, you may only have one option. `Contact Access` is not available when the organization-wide default for contacts is set to Controlled by Parent. Regardless of sharing access, account team members must also have the "Read" permission on accounts to view accounts that list them as members.

To build an account team, select an account and add account team members to it. High-volume portal users can't be added to teams.

1. View the account.
2. Click **Add** in the Account Team related list.
3. Select users to add to the account team. To add your default account team to an account, click **Add Default Team** in the Account Team related list. To add all account team members to an opportunity, click **Add Account Team** from the Opportunity Team related list on the opportunity.
4. Select the type of access each member should have to the account's related records. The access level cannot be less restrictive than your organization's default account access level.
5. Select a team role for each member.
6. Click **Save**.

Tip: In a custom list view, you can filter account lists by the account teams in which you are a member. When creating or editing a custom list view for accounts, select the `My Account Teams` filter. In account reports, you can filter accounts by the account teams in which you are a member.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add team members to an account:

- "Read" on users

  AND

  "Edit" on accounts

To view accounts as team members:

- "Read" on accounts

Editing Account Team Members

For each account you own or have access to, you can change the access level and role of any member.

Note: If a team member is on your default account team and you modify his or her properties for a specific account, those changes affect only that account. The setup of your default account team doesn't change.

You can grant the team member a higher access to the record only if you are the owner of account record, or above the owner in your organization's role hierarchy.

1. View the account.
2. To add team members, click **Add** or **Add Default Team** on the Account Team related list.
3. To edit a team member's access, click **Edit** next to the member's name and select a different access level for the account and its related contacts, opportunities, and cases.
4. To edit a team member's role, click **Edit** next to the member's name and select a different role.
5. Click **Save**.

Tip: Click **Display Access** in the Account Teams related list to show the organization-wide sharing settings related to accounts. These settings may allow greater access than those specified when the user was added to the account team. For example, if your company's organization-wide sharing setting for accounts is Read/Write, that setting will override a Read Only setting for an individual member of an account team. Contact access is not available when the organization-wide default access for contacts is set to Controlled by Parent.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view accounts as team members:

- "Read" on accounts

To edit team members:

- "Read" on users

  AND

  Edit" on accounts

  AND

  Owner of account record, or above owner in your organization's role hierarchy

Removing Account Team Members

For each account you own, you can remove any team member from the account team.

1. View the account.
2. Click **Del** next to the member's name in the Account Team related list.

   Click **Delete All** if you want to remove all the account team members at once.
3. Select **Remove** if you also want to remove the user from the opportunity teams of open opportunities associated with the account.
4. Click **Delete** to finish.

SEE ALSO:

Account Teams

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view accounts:
- "Read" on accounts

To remove team members:
- "Read" on users

  AND

  Edit" on accounts

  AND

  Owner of account record, or above owner in your organization's role hierarchy

Syncing Prospects, Contacts, and Leads with Pardot

Getting Started with the Salesforce Connector

Sync newly created prospects, contacts, and leads, between Pardot and Salesforce. In addition, sync Pardot emails sent to prospects as Salesforce activities.

The Salesforce connector, an AppExchange-certified solution, helps you streamline disparate marketing channels from within Pardot.

Records sync between in Pardot and Salesforce at least every 10 minutes. The sync process handles as many as 800 records every 10 minutes, and up to 4,800 every hour.

EDITIONS

Available in: Salesforce Classic

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

Setting Up the Salesforce Connector

Set up your Salesforce connector for either production or sandbox environments.

Choose the option that best describes your situation.

If you're setting up the connector for	You'll set up the connector using the instructions in
Either a production or a sandbox environment for the first time	Set Up the Connector to Sync with Either Production or Sandbox Environments
A sandbox environment in addition to an already existing connector you've already set up for your production environment	Set Up the Connector to Sync with Sandbox Environments

EDITIONS

Available in: Salesforce Classic

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

Prepare Salesforce for Connecting to Pardot

Install an AppExchange package to get Salesforce ready to connect and sync with Pardot.

The package you'll download from the AppExchange automatically updates Salesforce with a custom application, custom tab, and custom fields for leads and contacts. After you install the package, you'll see a custom tab for the Pardot LeadDeck application. Keep in mind that you may need to customize your view to display the custom fields for leads and contacts. This helps your sales teams share information between Pardot and Salesforce.

If you're installing the Pardot AppExchange package for a	You need to
Production environment	**1.** Go to the Pardot AppExchange package for production environments. **2.** Click **Continue** to install the package. **3.** When prompted for your username and password, enter your production username and password. **4.** Review the actions and click **Deploy** to complete the installation. **5.** Confirm with your Salesforce administrator you have read permissions for ObjectChangeLogs.
Sandbox environment	**1.** Log out of Salesforce. **2.** Go to the Pardot AppExchange package for sandbox environments. **3.** When prompted for your username and password, enter your sandbox username and password. **4.** Click **Continue** to install the package. **5.** Review the actions and click **Deploy** to complete the installation. **6.** Confirm with your Salesforce administrator you have read permissions for ObjectChangeLogs.

EDITIONS

Available in: Salesforce Classic

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

Set Up the Connector to Sync with Either Production or Sandbox Environments

Get your Salesforce connector ready to sync between Pardot and Salesforce for either a product or a sandbox environment.

Complete this procedure only if this is the first time you're establishing your connector. You'll need administrative rights in Salesforce for this procedure.

1. From Salesforce Setup, enter `Network Access` in the `Quick Find` box, then select **Network Access**.
2. Create these trusted IP ranges.

Start IP Address	End IP Address
67.228.95.145	67.228.95.145
67.228.168.139	67.228.168.141
67.228.223.106	67.228.223.107

EDITIONS

Available in: Salesforce Classic

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

Add the Connector to Pardot

Add and manage connector settings directly in Pardot.

Complete this procedure only if this is the first time you're establishing your connector and you have administrative rights in Salesforce.

1. In Pardot, hover over **Admin**, then click **Connectors**.
2. Click **+ Add Connector**.
3. Select Salesforce.
4. Type a name for the connector.

   Use a name that makes it easy for you to identify your connector.

   Example: Salesforce Connector)
5. Type your Salesforce username and password.

   Keem in mind that when your Salesforce password changes, you'll need to update the Salesforce password for your connector.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create records:
- "Create," "Update," and "Read" on contacts and leads

Options for Customizing the Connector

Customize the connector based on your preferences.

Select any of these options to customize your connector.

EDITIONS

Available in: Salesforce Classic

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

The option	Which
Automatically create prospects in Pardot if they're created in Salesforce	Enables a trigger to set any newly created leads or contacts in Salesforce to sync to Pardot. This won't happen for historical leads or contacts—only for those created after installing the Pardot AppExchange package in Salesforce, and will work only for leads and contacts created with an email address. If this feature is enabled later on, any leads and contacts with email addresses that were created after the Pardot package was installed in Salesforce will be pushed down to Pardot. Select a default campaign from the dropdown for any prospect created with this option.
Automatically change emails in Pardot to reflect changes in Salesforce	Automatically updates email addresses for Pardot prospects if an email address of a lead or contact is updated in Salesforce. Learn more about keeping email address updates in sync in About Email Address Updates Between Salesforce and Pardot.
Automatically match Salesforce users to Pardot users	Lets you send emails from any user fields, including, for example, support contacts and account managers. Learn how to set up this functionality is Send Emails from Salesforce.
Exclude Salesforce Partner and Customer Portal users from Prospect assignment	Prevents Salesforce Partner and Customer Portal users from displaying in the "CRM Username" dropdown when you edit a user in Pardot.
Allow editing of Prospect lists within the CRM	Lets users add and remove Pardot prospects from within Salesforce. If you check this box, you must add the Visualforce elements to your Leads and Contacts page layouts.
Connect to a Salesforce sandbox account	Let's you connect to a sandbox environment.
Sync emails with the CRM	Automatically logs an activity for every email sent to a prospect (list, drip, autoresponder and 1-to-1 prospect emails). Note: This can quickly fill up your activity views, especially on an account object. Disabling **Email Logging in Pardot** is not retroactive. If the email logging may interfere with your workflow in Salesforce, we recommended that you do not enable this option.
Sync plugin emails with the CRM	Logs an activity for emails you send through Pardot for Microsoft® Outlook®, our Thunderbird extension, our Apple Mail plug-in, or our add-in for Gmail.
Enable Salesforce emails for task creation	Lets you send a notification email to users when a task is created.
Enable Salesforce emails for assignment rules	Lets Salesforce send a notification email to users when assignment rules run.
Enable Salesforce emails for user and queue assignments	Lets Salesforce send a notification email to users when an assignment takes place for a user or queue.

Set Up the Connector to Sync with Sandbox Environments

Get your Salesforce connector ready to sync between Pardot and your Salesforce sandbox.

Complete this procedure only if you already have a Salesforce connector set up for your production environment, but want the connector to point to your sandbox environment instead.

1. In Pardot, hover over **Admin**, then click **Connectors**.
2. In the row for your Salesforce connector, click , then **Edit**.
3. In the `Username` field, append `.NSPARDOT` to your username.

   (*Example:* christina.wills@pardot.com.NSPARDOT)
4. If your sandbox password differs from your password in production, enter your sandbox one in the `Password` field.
5. Select the option `Connect to a Salesforce sandbox account`.

Because your sandbox is a copy of your production Salesforce organization, you'll see the connector for your sandbox, too.

EDITIONS

Available in: Salesforce Classic

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

Whitelist Pardot IP Addresses in Salesforce

Set up Pardot IP addresses in Salesforce so that Pardot can communicate with Salesforce.

Complete this procedure only if this is the first time you're establishing your connector. You'll need administrative rights in Salesforce for this procedure.

1. From Salesforce Setup, enter `Network Access` in the `Quick Find` box, then select **Network Access**.
2. Create these trusted IP ranges.

Start IP Address	End IP Address
67.228.95.145	67.228.95.145
67.228.168.139	67.228.168.141
67.228.223.106	67.228.223.107

EDITIONS

Available in: Salesforce Classic

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

Turn On the Connector

Complete a simple task to turn on the Salesforce connector so that you can begin syncing between Pardot and Salesforce.

1. In Pardot, hover over **Admin**, then click **Connectors**.
2. In the row for your Salesforce connector, click **verify now**.

   If Pardot is able to send data to and receive data from Salesforce, the status will change to .

EDITIONS

Available in: Salesforce Classic

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

Map Custom Leads Fields to Contacts Fields

Get the most out of contacts created from converted leads when you map custom fields between the two record types.

The connector creates leads in Salesforce from prospects in Pardot. But when you convert those Salesforce leads to contacts, only standard fields from the contacts appear for the newly converted contacts. Mapping custom fields between leads and contacts ensures you see all the information that helps you with your marketing and sales efforts.

1. From the object management settings for leads, go to the fields area, and 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. Click **Save**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Setting Up Pardot Custom Fields in Salesforce

Get your custom Pardot fields to appear in Salesforce.

The AppExchange package you installed to get Salesforce ready to connect and sync with Pardot sets up the custom fields for you, but the fields do not appear in Salesforce automatically. You need to complete a procedure to have these custom fields appear in Salesforce.

EDITIONS

Available in: Salesforce Classic

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

Add Sections to Leads and Contacts Page Layouts

Complete a procedure for getting Pardot fields to appear in leads and contacts page layouts.

1. In Salesforce, from the object management settings for leads, go to Page Layouts.
   A drag-and-drop box including your field options appears at the top of the page.
2. Drag a Section field to your Leads page layout.
3. In the pop-up window, enter section name `Pardot`.
4. For the number of columns, select **2 (Double)**.
5. Select the option for showing the section heading, and then click **OK**.
6. Return to the Fields section of the drag-and-drop editor and scroll right to locate the Pardot custom fields.
7. Drag all the Pardot fields into your new section.
8. Add another section using the drag-and-drop editor, but for the number of columns, select **1 (Single)**.
9. Select the option for showing the section heading, and then click **OK**.
10. Select **Visualforce Pages tab** and drag **Pardot Lead Activities** and **Pardot Lead List Membership** into your new section.

EDITIONS

Available in: Salesforce Classic

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

Set Up Salesforce to Add Campaign Prospects to Pardot

Set up Salesforce to quickly get prospects from your Salesforce campaigns into Pardot.

1. From the object management settings for campaigns in Salesforce Setup, go to Page Layouts.
2. Edit the layout, and select **Buttons**.
3. Drag the **Add to Pardot List** button to your row of custom buttons at the top of the Campaign view.
4. Save the layout.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Set Up Salesforce for Adding Leads and Campaigns to Pardot

Easily add buttons in Salesforce that make it easy to add leads and campaigns to Pardot, as well as send Pardot-tracked email from Salesforce.

If you want to add Salesforce leads and campaigns to Pardot, set up and use the **Send to Pardot** button. If email address associated with the Salesforce records:

- Don't yet exist in Pardot, the Send to Pardot feature creates new records for you in Pardot.
- Already exist in Pardot, no harm done—you won't get duplicate records in Pardot.

If you want to send Pardot-tracked email from Salesforce set up and use the **Send Pardot Email** button. You can send free-form tracked email, or use a marketing approved Pardot email template to send email to a lead or contact.

1. Log in to Salesforce as an administrator.
2. From the object management settings for leads, go to Page Layouts.
   A drag-and-drop box including your field options appears at the top of the page.
3. In the Lead Layout box, select **Buttons**.
4. Select the **Send to Pardot** button and drag it into the Lead Detail section.
5. Select the **Send Pardot Email** button and drag it into the Lead Detail section.
6. Save the layout.
7. Repeat Steps 2 through 6 for Contacts.

EDITIONS

Available in: Salesforce Classic

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

Assign Your Salesforce Username to the Connector

Make sure that any actions you take with the connector are associated with you.

1. In Pardot, hover over **Admin**, then click **User Management** > **Users**.
2. In the row for your user profile, click , then **Edit**.
3. Scroll to the bottom of the Edit User box.
4. Select your Salesforce username from the drop-down menu.
5. Click **Save user**.
6. When you're in your Pardot user profile, you'll see your Salesforce username in the **CRM Username** field. Click **Verify**, and enter your Salesforce password.

EDITIONS

Available in: Salesforce Classic

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

Set Up Single Sign-On for Salesforce and Pardot

Avoid having to sign on to your two separate Salesforce and Pardot systems.

1. Log in to Pardot.
2. Hover over your email address, and then click **My Settings**.
3. Verify that your Salesforce username is correct. If it's correct, cluck **Verify**. If you need to change or add it, click **Edit My User Information** to change or add it.
4. When prompted, enter your Salesforce password, and then click **Verify**.
   You'll receive a message letting you know whether the validation was scuuessful.
5. If the validation was successful, log in to Salesforce and select the Pardot tab.
   You should be able to see the contents of the tab without having to log in to Pardot separately.

EDITIONS

Available in: Salesforce Classic

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

Send Emails from Salesforce

Send emails from any user field, including support contacts, account managers, or anyone who is attached to a Pardot prospect.

Setting up your users and the necessary custom fields in Pardot lets you take advantage of this feature, and send emails to prospects that could appear to come from any user in Salesforce.

In	Do this
Salesforce	**1.** Create the field you'd like to use to contain your CRM User Value, e.g. Relationship Manager, on the lead or contact record in Salesforce. This field should be the type "Lookup Field." If you already have the field created, make sure that it's a "Lookup Field" and that it's successfully populated. **2.** Populate the lookup field with the user.
Pardot	**1.** Create matching user seats for any Salesforce users. **2.** On the user record, map the Pardot user seat to the Salesforce user. This lets Pardot to infer information about the user for variable tags when sending the email. **3.** Create a custom field in Pardot with the designated type "CRM User" to hold the field values on the prospect record. This field is a read-only field in Pardot. **4.** Map the custom field to the corresponding salesforce.com field.

EDITIONS

Available in: Salesforce Classic

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

About Email Address Updates Between Salesforce and Pardot

Learn how email address updates for your Salesforce contacts and leads automatically sync to your corresponding prospects in Pardot.

When you update email addresses either manually or with Data.com for your Salesforce contacts and leads, the following sync cycle updates the email addresses for corresponding Pardot prospects. Also, if you merge Salesforce contacts or leads and the email addresses for your primary records differ from the corresponding Pardot prospects, the following sync cycle updates email addresses for your prospects.

EDITIONS

Available in: Salesforce Classic

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

What Syncs when Email Addresses are Missing in Salesforce or Pardot

If you have Salesforce contacts or leads that don't include email addresses, but then subsequently add them, the sync cycle will not create new prospects in Pardot. If, however, prospects with matching email addresses already exists in Pardot, the sync cycle will update email addresses for the matching Salesforce leads or contacts.

Understand Sync Options for Pardot Accounts and Salesforce Person Accounts

Easily sync leads between the two systems after you assign your Pardot prospects to users.

Consider these options before you sync Pardot accounts and Salesforce person accounts.

If you want Pardot to	You should know that
Create leads in Salesforce and sync with person accounts	By default, the connector creates Salesforce records as leads. But when leads are converted to person accounts, Pardot is unable to recognize person accounts. Pardot can't sync with person accounts. Instead, Pardot recreates leads to sync with. If you use person accounts in Salesforce, you'll want to change this default behavior. By enabling person account syncing with lead creation, Pardot still creates records in Salesforce as leads, but when the leads are converted into person accounts, Pardot syncs with the person account and no additional Salesforce leads will be created for that prospect. With this syncing, a Salesforce person account will sync to a Pardot prospect record that is associated with an Account in Pardot, which will not merge the two records into one view as in Salesforce. The field mapping will remain the same—contact fields will map to prospect fields and salesforce.com account level fields will map to Pardot account fields. This means that the Account Owner of a person account will sync to the Assigned User field on the account level in Pardot.
Create and sync person accounts only	Assigned prospects that have updated default field values (including the assigned owner) in Salesforce sync roughly every ten minutes, pushing the updates back to the Pardot record (because Salesforce wins in the event of a conflict in data). Updates to custom fields also sync with Salesforce, pushing those back to the Pardot record unless the option to have the Pardot value override the Salesforce value is enabled for that custom field. Unassigned prospects in Pardot that have activities or updated records also sync if records in Salesforce use the same email address. Keep in mind that assigned prospects take higher priority for syncing than those that are unassigned in Pardot. If there are no matching email addresses in Salesforce, the prospect in Pardot will not sync until it's assigned to a user. This means that the connector will not create new records in Salesforce until the prospect is assigned in Pardot.

EDITIONS

Available in: Salesforce Classic

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

Sync Leads between Pardot and Salesforce

Easily sync leads between the two systems after you assign your Pardot prospects to users.

If you already have leads in Salesforce, the connector will sync those leads to Pardot, merging the Pardot prospects and Salesforce leads between the two systems. If data in common fields between Salesforce and Pardot conflicts, including lead owner, the data from the Salesforce fields always wins. You can take advantage of this functionality when you set up custom fields in Pardot. You can also set up Pardot to send emails to prospects that appear to come from any user in Salesforce.

Sync Method	Do this
Manual	In Pardot, when you click the link **Synchronize with CRM**, prospects in Pardot and leads in Salesforce sync instantly, merging the data from Pardot with that from Salesforce.
Automatic	Assigned prospects that have updated default field values (including the assigned owner) in Salesforce sync roughly every ten minutes, pushing the updates back to the Pardot record (because Salesforce wins in the event of a conflict in data). Updates to custom fields also sync with Salesforce, pushing those back to the Pardot record unless the option to have the Pardot value override the Salesforce value is enabled for that custom field. Unassigned prospects in Pardot that have activities or updated records also sync if records in Salesforce use the same email address. Keep in mind that assigned prospects take higher priority for syncing than those that are unassigned in Pardot. If there are no matching email addresses in Salesforce, the prospect in Pardot will not sync until it's assigned to a user. This means that the connector will not create new records in Salesforce until the prospect is assigned in Pardot.

EDITIONS

Available in: Salesforce Classic

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

Tracking Prospects as Salesforce Contacts

Automatically create contacts in Salesforce from your Pardot prospects.

By default, the Salesforce connector creates Salesforce leads from your prospects in Pardot. If you don't want to track your prospects as leads in Salesforce, you can have a Pardot Services member adjust the default setting so that Pardot creates contacts in Salesforce instead of leads.

If this feature is enabled on your account, Pardot will look first at your Salesforce leads to see whether there's an existing lead record with the same email address with which Pardot can sync. If there's no existing lead record, Pardot looks for an existing contact record with the same email address. If noSalesforce lead or contact exists with the same email address, Pardot will create a new Salesforce contact record.

EDITIONS

Available in: Salesforce Classic

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

Tracking the Products Your Customers Buy

What Are Assets?

While products represent the items that your company sells, assets represent the specific products your customers have purchased. Assets have a serial number, date of purchase, and other information related to an individual sale. Depending on how your organization uses assets, they can represent a competitor product that your customer has or versions of your products.

Use assets to store specific information about the products your customers have. You can view assets on the Assets tab. Depending on your page layouts, you also can view asset related lists on your account, contact, and product page layouts.

You can introduce hierarchy to assets in your org to represent more complex products. An asset can have up to 2,000 child assets, and a hierarchy of assets can have up to 50 levels. Define relationships between assets using the `Parent Asset` field on assets.

If your admin has set up entitlements, your customers may be eligible for support based on an asset they've purchased.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

SEE ALSO:

Getting Started with Assets

Getting Started with Assets

If your organization has enabled products, assets are automatically enabled for your organization. However, admins still need to customize their org before users can begin using assets.

To implement assets for your organization:

- Add the Assets tab to your home page.

  Note: By default, the Assets tab is hidden in organizations created before Spring '15. You can make the Assets tab visible to your users by changing the user profiles.

- Add the Assets related list to account, contact, and product page layouts. Users can create new assets from these related lists.
- If you want to be able to make one asset a child of another asset, add the `Parent Asset` field to asset page layouts. If you'd like to give users more context, you can also add the read-only `Root Asset` field, which represents the top-level asset in an asset hierarchy.
- Add the Cases related list to the appropriate product and asset page layouts.
- Add the `Asset` field to your case page layouts. Consider changing the field-level security for the `Asset` field so that it displays or is required if necessary for your business.
- By default, your users have "Read," "Create," "Edit," and "Delete" permissions on assets. If necessary, revise these permissions for your users. Without the "Read" permission on assets, users will not see any assets or asset related lists in Salesforce.
- Optionally, customize asset fields and page layouts from Setup by entering *`Assets`* in the `Quick Find` box, then selecting **Assets**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

SEE ALSO:

What Are Assets?

Displaying the Assets Tab

The Assets tab is where you can view and work with assets. The Asset tab is visible in organizations created after Spring '15.

By default, the Asset tab is hidden for organizations created before Spring '15, so it doesn't appear in the All Tabs page. Update the user profile to change the tab visibility.

1. From Setup, click **Administer** | **Manage Users** | **Profiles**.
2. Click **Edit** next to the user profile that you want to update.
3. In the Tab Settings list, change the setting for Assets to `Default On`.
4. Click **Save**.
   Now users with the updated profile can see the Asset tab in the All Tabs page and can add the Assets tab to their home pages.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view tab settings:
- "View Setup and Configuration"

To edit tab settings:
- "Manage Profiles and Permission Sets"

Displaying and Editing Assets

You can display an asset from the Products tab or a related account or contact.

Displaying Assets
Once you have located an asset from a related list, or the products home or list pages, click the name to display detailed information. If hover details are enabled, hover over any lookup field on the detail page to view key information about a record before clicking into that record's detail page.

Viewing Asset Updates and Comments (Chatter)
Display a Chatter feed of updates, comments, and posts about the asset.

Editing Assets

- Use inline editing to edit fields directly on the detail page. If inline editing isn't enabled, contact your administrator.
- To display the page in edit mode, click **Edit**, make your changes, and click **Save**.

Asset Related Lists
Below the asset detail are related lists that include information about associated cases, entitlements, activities, or notes and attachments. The related lists you see are determined by your personal customization and any customization your administrator has made to page layouts. Click on individual items to display additional information about them. Click **more** at the bottom of the page or **View More** below a related list to display more items.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view assets:
- "Read" on assets

To change assets:
- "Edit" on assets

Printing Assets
To open a printable display of the record details, in the top-right corner of the page, click **Printable View**.

To return to the last list page you viewed, click **Back to list** at the top of the asset detail page. If your organization has enabled collapsible page sections, use the arrow icons next to the section headings to expand or collapse each section on the detail page.

Note: Users can view an asset if they can view the account or contact listed on the asset. However, sharing settings may prevent users from viewing the account associated with the contact on the asset.

Deleting Assets

Since assets are related to account and contact records, you can delete them from those records or individually using the Products tab. Before you delete an asset, review the following scenarios:

- **Is the asset associated with a case?**

  Assets associated with cases cannot be deleted. This includes deleting an account or contact record that is associated with an asset listed on a case.

- **Is the asset associated with a product?**

  When an asset is based on a product, deleting the product does not delete the asset.

- **Is the asset associated with an account or contact?**

  If you delete an account or contact, all associated assets are also deleted and moved to the Recycle Bin.

  Note that if you delete an account with a related contact that is associated with an asset, all three records are deleted. To restore all three records, restore the account record.

- **Does the asset have child assets?**

  You can't delete an asset with child assets. Assign the child assets to a different parent asset and try again. Remember that updating the `Parent Asset` field on an asset changes its root asset to match the new parent's root.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view assets:
- "Read" on assets

To delete assets:
- "Delete" on assets

To recover deleted assets:
- "Delete" on assets

Note: You can delete an asset individually without deleting any related record. However, if you later delete the related record, you cannot recover the asset from the Recycle Bin.

To delete an asset:

1. Locate the asset on the Assets related list of an account or contact, or on an asset list view from the Products tab.
2. Click **Del** next to the asset you want to delete.
3. Click **OK**.

SEE ALSO:

What Are Assets?

Set Field History Tracking on Assets

Track changes to asset records by enabling field history tracking.

Use field history tracking to see information about:

- The date and time when the field was changed
- What changed
- Who made the change

To enable tracking on asset fields, from the object management settings for assets, go to the fields section and click **Set History Tracking**. See also Tracking Field History.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Setting the Asset Owner Field

Asset records have an `Asset Owner` field, which is used to set hierarchy and sharing-based access controls. By default, the asset owner is the user who created the asset record.

As of Spring '15, the `Asset Owner` field is used for access control when the Assets object's sharing setting is *Private*, *Public Read-Only*, or *Public Read/Write*. If the Assets object's sharing setting is *Controlled by Parent*, the asset owner field has no effect on access control, because the parent account's settings control access to the asset.

In organizations created before Spring '15, you can automatically update the asset owner field on asset records when you enable the Assets object sharing preference. The sharing preference sets the value of the asset owner field to equal either:

- The user who created the asset, or
- The user who is the owner of the parent account

By default, the `Asset Owner` field is not shown in the page layout. To add the `Asset Owner` field to the page layout, from the object management settings for assets, go to Page Layouts.

1. From Setup, enter *`Asset Settings`* in the `Quick Find` box, then select **Asset Settings**.
2. Select the checkbox next to `Enable Asset Sharing`.
   The options for setting the default `Asset Owner` field display.
3. Set the `Asset Owner` to be either:
   - Creator of the asset
   - Owner of the parent account
4. Click **Save**.
   The system updates the `Asset Owner` field with your selection.

To change the asset owner of an asset record, click the Assets tab and select an asset record or open the asset record from the Assets Related List on the Accounts, Contacts, or Products tabs. In the Asset Detail section, click **Change** next to the `Asset Owner` field and select a different user from the lookup menu.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable sharing:
- "Manage Sharing"

To create, edit, and delete page layouts:
- "Customize Application"

Enabling Sharing Rules for Assets

Sharing rules allow you to make automatic exceptions to your organization-wide sharing settings for defined sets of users. If your organization was created before Spring '15, you must enable the sharing preference so you can create and apply sharing rules on assets in your organization.

Previously, the asset object was a child object of the Accounts object, so the asset object's visibility was based on the parent object's settings. In Spring '15, the asset object was redesigned to be an individual standard object, not a child object. As a result, you can create sharing rules and apply them to asset records.

Note: Sharing is enabled by default in organizations created after Spring '15, so you can skip these steps. For organizations created before Spring '15, sharing is disabled by default. If you want to use sharing rules, then you must enable the sharing preference.

1. From Setup, enter *`Asset Settings`* in the `Quick Find` box, then select **Asset Settings**.
2. Select the checkbox next to `Enable Asset Sharing`.
3. Click **Save**.
   Now you can create and apply sharing rules on assets.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable sharing:
- "Manage Sharing"

After you've enabled asset sharing, specify how the system should populate the `Owner` field.

Sharing Assets

To view and manage sharing details for assets, click **Sharing** on the asset detail page. The Sharing Detail page lists the users, groups, roles, and territories that have sharing access to the asset.

Your administrator defines the default sharing model for your entire organization. You can change this model to extend sharing to more users than the default set by your administrator. However, you cannot change the sharing model to make it more restrictive than the default.

On the 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 access to the record for other users, groups, roles, or territories.

  Note: To share an asset with another user, that user must have access to the account associated with the asset and the "Read" permission on assets.

- Click **Expand List** to view all users that have access to the record.
- 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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view assets:
- "Read" on assets

Creating Asset Sharing Rules

Asset 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 asset 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 Asset 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.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create sharing rules:
- "Manage Sharing"

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.

8. In the `Share with` line, specify the users who should have 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 a setting for `Asset Access`.
10. In the remaining fields, select the access settings for the records associated with the shared assets.

Access Setting	Description
Controlled by Parent	Users can view, edit, or delete an asset based on whether he or she can perform that same action on the parent object associated with the Asset object. Controlled by Parent is the default access setting.
Private (available for associated contacts, opportunities, and cases only)	Users can't view or update records, unless access is granted outside of this sharing rule.
Read Only	Users can view, but not update, records.
Read/Write	Users can view and update records.

Note: Asset Access is not available when the organization-wide default for assets is set to Controlled by Parent.

11. Click **Save**.

Tracking the People You Work With

Contacts

A contact is someone who's associated with one of your accounts or other records such as opportunities. Contacts are typically employees of the businesses that you sell to. Contact details provide the information that you need to work your deals effectively, such as name, mobile phone number, and job title.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

Considerations for Creating Contacts
Before you create contacts, consider a few key points.

Guidelines for Viewing and Managing Contacts
Use the Contacts home page to view and manage your contacts.

Update Contacts via Stay-in-Touch Requests
To quickly and easily request updated contact information from a contact or person account, send a Stay-in-Touch request.

Considerations for Changing the Account for Contacts
Consider key points before changing the account that's associated with a contact.

Merge Duplicate Contacts
If duplicate contacts are associated with the same account, you can merge them. That way, your data is streamlined and up-to-date.

Display and View a Contact's Org Chart

Find out who's who at your contacts' companies. Salesforce can display an org chart with contact hierarchy for each of your contacts. That way, you have even more information for planning your sales strategy.

Considerations for Deleting Contacts

Most contacts can be deleted with one click. However, before you delete a contact, be aware of who can delete contacts and what happens to records that are associated with deleted contacts.

SEE ALSO:

What Is a Person Account?

Social Accounts, Contacts, and Leads

Manage Email and Templates in Lightning Experience

Manage Work and View Past Activity in Lightning Experience

Considerations for Creating Contacts

Before you create contacts, consider a few key points.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

- You can create a contact from several places in Salesforce.
  - Create a contact on an account's detail page.
  - Import a contact from a mobile device using the Salesforce1 app.
  - Create a contact in the Contacts area.

    Note: When using this method, if you don't add an account, the new contact is private.
- To create a contact that's automatically associated with an account, create the contact in the account's detail page.
- If your Salesforce org uses record types, you're sometimes prompted to choose a `Record Type` when creating a contact. Different record types can have different fields and picklist values.
- If your Salesforce org uses divisions, the division of a new contact is automatically set to the division of the related account.
- Always associate a contact with an account, unless you have a specific reason not to. Contacts without accounts are hidden from all users except their owner and system administrators, which makes them hard to find and easy to forget.

SEE ALSO:

Contacts

Import Contacts from Mobile Device Contact Lists into Salesforce

Contact Fields

Share Contacts

Guidelines for Viewing and Managing Contacts

Use the Contacts home page to view and manage your contacts.

- Person accounts don't appear in the Recently Viewed list on the Contacts home page.
- If you're using Salesforce Classic, a printable view of the contacts list is available. You can save the printable view as a PDF.
- When you select a person account from a contact list view, the corresponding person account appears on the Accounts page.
- To view a filtered list of contacts, select a predefined view from the drop-down list. Admins of Professional, Enterprise, Unlimited, Performance, and Developer Edition orgs can grant access to contacts beyond what the sharing model allows. .

  If you're using Salesforce Classic:

  - To define your own custom view, click **Create New View**.
  - To edit or delete a view that you created, select it from the `View` drop-down list, and then click **Edit**.
- To make person accounts easy to find, create a custom list view, adding the `Is Person Account` icon as a column.
- If you're using Salesforce Classic, to add contacts to a campaign, select the checkbox next to one or more contacts, and then click **Add to Campaign**. To select all displayed records, select the checkbox in the column header.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view contacts:
- "Read" on contacts

To create contacts:
- "Create" on contacts

SEE ALSO:

Contacts

Considerations for Changing the Account for Contacts

Share Contacts

Finding Out if Your Partners Use Salesforce

Accounts

Update Contacts via Stay-in-Touch Requests

To quickly and easily request updated contact information from a contact or person account, send a Stay-in-Touch request.

If the contact or person account has a valid email address, you can request updates from:

- Contacts that you own
- Contacts that are associated with accounts that you own
- Contacts that you can edit because of a sharing rule or manual record sharing
- Person accounts that you own

1. On the detail page of a contact or person account, click **Request Update**.

   An outgoing email is created according to your personal Stay-in-Touch settings.

2. As needed, edit the details of the email.

   Note: Spell Checker does not support all the languages that Salesforce supports. For example, Spell Checker doesn't support Thai, Russian, and double-byte languages, such as Japanese, Korean, or Chinese.

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To request updates:
- "Send Stay-in-Touch Requests"

  AND

  "Send Email"

3. Click **Send**. You can send individual Stay-in-Touch requests regardless of the recipient's `Email Opt Out` setting.

   The recipient receives the email and clicks a link to provide updates or to confirm that no changes are necessary. You receive an email notification.

4. Click the link in the email to update, review, and accept or reject the new information.

SEE ALSO:

Use Stay-in-Touch Responses to Update Contact Details

Use Mass Stay-in-Touch to Request Updated Contact Information from Multiple People

Display and View a Contact's Org Chart

Considerations for Changing the Account for Contacts

Consider key points before changing the account that's associated with a contact.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

Note: If the contact has a parent account, and the organization-wide default is Controlled by Parent, "Edit" access on the account is required to edit the contact.

- If any of the following are true, you can change the account that's associated with a contact.
  - You have access to the contact, and you're the owner of the target account or the manager of the owner in the role hierarchy.
  - You're the owner of the contact, or you have access to the contact, and you have access to the target account.
  - You're an admin.

  If you don't meet any of these conditions, contact your admin to change the associated account.
- If you change the `Account Name` field:
  - Cases and opportunities that are associated with the contact remain associated with the previous account and don't roll up to the new account.
  - New cases and opportunities that are created for the contact are associated with the new account.

For contacts that are enabled for portals, review these considerations.

SEE ALSO:

Contacts

Share Contacts

Merge Duplicate Contacts

If duplicate contacts are associated with the same account, you can merge them. That way, your data is streamlined and up-to-date.

1. From the Contacts related list of an account, click **Merge Contacts**.
2. Select the rows of up to three contacts that you want to merge. Search the list of associated contacts to shorten the list, or click **All Contacts** to view the full list of associated contacts. Click **Next** to continue.
3. Select one contact as the Master Record.
4. Select the partner portal or Customer Portal user that you want to retain. This option is available only if a partner portal or Customer Portal is enabled for your organization. You can select `Not a portal user` so that a merged contact doesn't include a portal user.
5. Select the fields that you want to retain from each record. If conflicting data exists, the fields in the left column are preselected and the row is marked in purple.
6. Click **Merge**.

See it in action: How to Merge Contacts in Salesforce

SEE ALSO:

Considerations for Merging Duplicate Contacts

Considerations for Merging Contacts That Are Associated with Portal Users

Use Stay-in-Touch Responses to Update Contact Details

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions

Customer Portal is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Partner Portal is available in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To merge contacts:
- "Delete" on contacts

To merge Customer Portal enabled contacts:
- "Delete" on contacts

  AND

  "Edit Self-Service Users"

To merge partner portal enabled contacts:
- "Delete" on contacts

  AND

  "Manage Partners"

Display and View a Contact's Org Chart

Find out who's who at your contacts' companies. Salesforce can display an org chart with contact hierarchy for each of your contacts. That way, you have even more information for planning your sales strategy.

1. To display a contact's org chart, enter the name of the contact's manager in the `Reports To` field in the contact's record.
2. Save your changes.
3. To view the contact's org chart, click **[View Org Chart]** in the contact's record.

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To view org chart:
- "Read" on contacts

To change org chart:
- "Edit" on contacts

Note: To maintain a complete org chart, make sure that every contact in an account contains another contact in the `Reports To` field. (The contact at the top of the org chart is an exception.) If your contact doesn't report to anyone, the org chart shows only a single person, regardless of how many other contacts are assigned to the same account.

SEE ALSO:

Contacts

Update Contacts via Stay-in-Touch Requests

Considerations for Deleting Contacts

Most contacts can be deleted with one click. However, before you delete a contact, be aware of who can delete contacts and what happens to records that are associated with deleted contacts.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

Tip: We recommend deactivating a contact unless it's necessary to delete it. That way you retain an accurate historical record.

- You can delete a contact if you're an administrator, the contact owner, or a user above the contact owner in the organization role hierarchy, *and* if you have the "Delete" permission on the Contact object. If you meet these requirements, you'll see **Delete** as an option on the contact's detail page and on its row on the contact list page in.
- If you delete a contact, these associated records are also deleted. You don't need the "Delete" permission on the associated records.
  - Assets (without cases)
  - Attachments
  - Campaign history
  - Events
  - Notes
  - Tasks

  Accounts, entitlements, and opportunities that are associated with the contact aren't deleted.
- The deleted contact is moved to the Recycle Bin. If you undelete the contact, any associated records are restored, including any inactive Self-Service usernames.
- If you delete or remove an activity's primary contact, another contact becomes the primary contact in its place. You can edit the activity to manually select another primary contact.
- You can't delete contacts that have these records associated with them.
  - Assets (with cases)
  - Cases
  - Contracts
  - Partner user
  - Service contracts
  - Active Self-Service users
  - Active Customer Portal users

Share Contacts

Share contacts with other users to make it easier to collaborate within your sales team.

To share contact records with other users, those users must have Read permission for Contacts. When you share a contact record that has an associated account, the account is also shared only if you have permission to share account records.

EDITIONS

Available in: Salesforce Classic

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

1. On a contact's detail page, click **Sharing**.

   The sharing detail page lists the users, groups, roles, and territories that have sharing access to the contact.

   Note: If the organization-wide default for contacts is Controlled by Parent, the Sharing button isn't available.

2. On the sharing detail page, 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 **Expand List** to view all users that have access to the record.
   - Click **Add** to grant access to the record for other users, groups, roles, or territories.
   - 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.
3. Save your changes.

SEE ALSO:

Contacts

Guidelines for Viewing and Managing Contacts

Considerations for Changing the Account for Contacts

Contact Fields

Contacts have the following fields, listed in alphabetical order. Availability of fields depends on how your admin set up Salesforce.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

Field	Description
`Account Name`	The account that the contact is linked to. Enter the account name, select the account from a list, or create an account. Private contacts don't have an account.
`Allow Customer Portal Self-Registration`	If you allow access to a customer portal, when selected, allows contacts to self-register for it.
`Assistant`	The contact's assistant. Maximum 40 characters.
`Asst. Phone`	The assistant's phone number. Maximum 40 characters.

Field	Description
Birthdate	The contact's birthday. Click the field, and then choose a date from the calendar.
Contact Currency	The default currency for all currency amount fields in the contact. Amounts are displayed in the contact currency and converted to the user's personal currency. Available when multiple currencies are used.
Contact Division	The division that the contact belongs to. This value is inherited from the related account. Available when divisions are used to segment data.
Contact Owner	The contact's assigned owner. Not available in Personal Edition.
Contact Record Type	The name of the field that determines what picklist values are available for the record. Available in Enterprise, Unlimited, Performance, and Developer Editions.
Created By	The user who created the contact. Includes creation date and time. Read only.
Custom Links	A list of custom links for contacts, as set up by your administrator.
Department	The associated business or organizational unit. Maximum 80 characters.
Description	The contact's description. Maximum 32 KB of data. The first 255 characters appear in reports.
Email	The contact's email address. A valid email address is required. Maximum 80 characters. Click the email address in this field to send an email using your personal email application. This action isn't logged as an activity on the contact record. If the Gmail Buttons and Links feature is enabled, click the Gmail link next to the field to send an email from your Gmail account.
Fax	The contact's fax number. Maximum 40 characters.
First Name	The contact's first name, as displayed on the contact edit page. Maximum 40 characters.
First Name (Local)	The contact's first name, translated into the local language.
Home Phone	The contact's home phone number. Maximum 40 characters.
Last Modified By	The user who last changed the contact fields, including modification date and time. This field doesn't track changes that were made to any of the related list items on the contact. Read only.

Field	Description
Last Name	The contact's last name as displayed on the contact edit page. Maximum 80 characters.
Last Name (Local)	The contact's last name, translated into the local language.
Last Stay-in-Touch Request Date	The date when the most recent Stay-in-Touch request was sent.
Last Stay-in-Touch Save Date	The date when the most recent Stay-in-Touch request was returned and merged.
Lead Source	The record source: for example, Advertisement, Partner, or Web. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters for each picklist value.
Mailing City	The city in the mailing address. Maximum 40 characters.
Mailing Country	The country in the mailing address. Maximum 80 characters.
Mailing State/Province	The state or province in the mailing address. Maximum 80 characters.
Mailing Street	The street in the mailing address. Maximum 255 characters.
Mailing Zip/Postal Code	The zip or postal code in the mailing address. Maximum 20 characters.
Middle Name	The contact's middle name, as displayed on the contact edit page. Maximum 40 characters. To enable this field, contact Salesforce Customer Support. Next, from Setup, enter *User Interface* in the Quick Find box, then select **User Interface**. Then select Enable Middle Names for Person Names.
Middle Name (Local)	The contact's middle name, translated into the local language. To enable this field, contact Salesforce Customer Support. Next, from Setup, enter *User Interface* in the Quick Find box, then select **User Interface**. Then select Enable Middle Names for Person Names.
Mobile	The contact's mobile phone number. Maximum 40 characters.
Name	The contact's combined first name, middle name, last name, and suffix, as displayed on the contact detail page.
Other City	The city in another address for the contact. Maximum 40 characters.
Other Country	The country in another address for the contact. The entry is selected from a picklist of standard values or entered as text. If the field is a text field, maximum 80 characters.
Other State/Province	The state or province in another address for the contact. The entry is selected from a picklist of standard values or entered as text. If the field is a text field, maximum 80 characters.

Field	Description
Other Street	The street address in another address for the contact. Maximum 255 characters.
Other Zip/Postal Code	The zip or postal code in another address for the contact. Maximum 20 characters.
Other Phone	Another phone number for the contact. Maximum 40 characters.
Phone	The contact's primary phone number. Maximum 40 characters.
Reports To	The name of the contact's manager. Enter a contact name, or select a contact from the list.
Salutation	The title for addressing the contact, for example, Mr., Ms., or Dr. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters.
Suffix	The suffix in the contact's name, as displayed on the contact edit page. Maximum 40 characters. To enable this field, contact Salesforce Customer Support. Next, from Setup, enter *User Interface* in the Quick Find box, then select **User Interface**. Then select Enable Middle Names for Person Names.
Title	The contact's position within the organization. Maximum 80 characters.
Username	For Self-Service contacts only. The Username defaults to the Email. Contacts enter their usernames when logging in to 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.

SEE ALSO:

Considerations for Creating Contacts

Considerations for Changing the Account for Contacts

Use Stay-in-Touch Responses to Update Contact Details

Use a contact's Stay-in-Touch email reply to update a contact record.

1. From the Stay-in-Touch email response that you receive, click the **Update Now** link.
2. Review the new and original values.

EDITIONS

Available in: Salesforce Classic

Available in all editions

3. Click **Accept Changes** to save the new data or **Reject Changes** to ignore the updates and retain the original values.

SEE ALSO:

Update Contacts via Stay-in-Touch Requests

Edit Stay-in-Touch Settings

Use Mass Stay-in-Touch to Request Updated Contact Information from Multiple People

Use Mass Stay-in-Touch to Request Updated Contact Information from Multiple People

To request updated information from more than one contact or person account at a time, use the Mass Stay-in-Touch wizard.

1. On the contacts home page, under Tools, click **Mass Stay-in-Touch**. If your Salesforce org uses person accounts, the link also appears on the accounts home page.
2. Select a list view of contacts and person accounts from whom you're requesting updated information. You can also edit list views and create list views from here.
3. Click **Go**.
4. Select the individuals to whom the request will be sent.

   Only records with email addresses can be selected. Records that have the `Email Opt Out` option selected don't appear in the list view, because you can't send mass emails to them.
5. Click **Next**.
6. Review the email text. If needed, edit your Stay-in-Touch settings.
7. Click **Send**.

When recipients reply with their latest information, use the link in their reply to make updates to their contact record.

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To send mass Stay-in-Touch updates:

- "Send Email"

  AND

  "Send Stay-in-Touch Requests"

SEE ALSO:

Update Contacts via Stay-in-Touch Requests

Use Stay-in-Touch Responses to Update Contact Details

Edit Stay-in-Touch Settings

Considerations for Changing Accounts on Contacts That Are Enabled for Portals

Consider key points before you change the account on contacts that are enabled for portals.

- External users can access their own cases and opportunities from their previous accounts.
- You can transfer contacts that are enabled for a partner portal only to accounts that are enabled for a partner portal.
- Contacts' portal roles are automatically updated to match the name of the account that they're transferred to (unless they're high-volume customer users, which don't have roles). For example, the portal role "Account A Customer User" becomes "Account B Customer User" (because a portal role's name includes the name of the account that it's associated with). Portal roles are unique to each account and are located under the account owner's role in your Salesforce org's role hierarchy.

EDITIONS

Available in: Salesforce Classic

Available in all editions

- 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.
- Delegated partner user administrators and delegated customer user administrators can update portal users on accounts that they're transferred to.

Considerations for Merging Duplicate Contacts

Consider key points before you merge duplicate contacts.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions

Customer Portal is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Partner Portal is available in: **Enterprise**, **Performance**, and **Unlimited** Editions

- Related items from duplicate contacts, such as opportunity or case information, are associated with the merged contact.
- Discarded duplicate records are moved to the Recycle Bin.
- The newly merged contact displays the `Created By` date from the oldest contact that you're merging and shows the merge date as the `Modified By` date.
- Merging contacts isn't tracked in the setup audit trail.
- The newly merged contact is included on any case teams in which the contacts were associated.
- The master contact replaces the duplicate contacts in all requested and scheduled meetings that they were invited to. However, make sure that you edit the event detail page and click **Add to Invitees** to add the new master contact to the meeting invitee list.
- All meeting messages written by the duplicate contacts are automatically associated with the master contact. (Meeting messages appear on the requested meeting's web page and are visible to all invitees.)
- Any data in hidden or read-only fields is taken from the Master Record. However, administrators and users with the "Edit Read Only Fields" permission can manually select which read-only fields to retain.
- If you merge duplicate contacts that are members of different campaigns, the campaign `Member Status Updated` date for each contact is retained and associated with the newly merged contact.
- Before merging contacts that have active Self-Service usernames, deactivate one Self-Service username. The merged record adopts the active Self-Service username. For more information on the Self-Service username field, see Contact Fields.
- If you merge contacts that have `Reports To` relationships, the newly merged contact retains the `Reports To` field from the selected Master Record.
- Existing account sharing and manual sharing for the master contact are applied to the newly merged contact.

Considerations for Merging Contacts That Are Associated with Portal Users

Consider key points before you merge contacts that are associated with portal users.

- You can merge a portal contact with another portal contact. For example, you can merge contacts that are enabled to use the following.
  - A partner portal *with* contacts that are enabled to use a customer portal or vice versa
  - A partner portal or customer portal with contacts that are *not* enabled to use a portal
- Before you merge contacts that include partner users *and* customer users, decide which type of portal user to retain. The user that you don't retain is disabled. However, after the contacts are merged, you can enable the contact for access to the portal from which it was removed during the merge process.
- Portal users who are disabled during the merge process retain ownership of any records that they own. For example, if a portal user owns a case, and the portal user is disabled, he or she remains the owner of the case until the case is updated with a new owner.
- You can merge contacts that are associated with various accounts by transferring the contacts that you want to merge into one account and then merging the contacts that are associated with the common account.

EDITIONS

Available in: Salesforce Classic

The customer portal is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The partner portal is available in: **Enterprise**, **Performance**, and **Unlimited** Editions

SEE ALSO:

Considerations for Merging Duplicate Contacts

Import Contacts from Mobile Device Contact Lists into Salesforce

Sales reps can save time and eliminate typos by using the Salesforce1 app to import contacts from mobile device contact lists into Salesforce. This feature is available only in the Salesforce1 downloadable apps.

1. In Salesforce1, navigate to where you create contacts.
2. Tap **Import from Device** to open the device's contact list.
3. Select a contact.
4. To associate the contact with an account in Salesforce, go to the contact record in Salesforce and add an account.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

When importing contacts from a mobile device, these fields are mapped from your device's contact to the Salesforce contact.

- `Email`
- `Home Phone`
- `Mailing City`
- `Mailing Country`
- `Mailing Postal Code`
- `Mailing State`
- `Mailing Street`
- `Mobile`
- `Other Phone`
- `Phone`

Note: In some situations, mappings from the local device don't map as expected to the Salesforce1 contact record.

Get High Quality Data When You Need It Right In Salesforce

High quality data is key to business success. When data quality is high, it means your records are complete and up-to-date; it means you have the right connections at the companies that interest you; and it means you have the information you need to close deals and expand your business. In short, high quality data lets you understand, adapt, focus, and execute with surgical precision. Data.com offers a suite of products to give your business the high quality data it needs when it needs it. That way, you spend less time entering and updating data and more time growing your business.

The free version of Data.com is available to all Salesforce organizations and includes the following functionality.

- For organizations with Professional Edition and above, administrators can use Duplicate Management tools to control whether and when users can create duplicate records inside Salesforce. Administrators can customize the logic that's used to identify duplicates and can create reports on the duplicates that they allow users to save.
- All users can search across the complete Data.com database of accounts and contacts. However, free version users can't see phone and email information for contacts, see account cards or D&B data on account records, add records to Salesforce, or clean records. To take full advantage of Data.com's data, purchase Data.com licenses and set up the feature.

The Data.com product suite includes Data.com Prospector, Data.com Clean.

Note: For organizations with Performance Edition, users automatically get Data.com Corporate Prospector and Data.com Corporate Clean. For an additional cost, you can upgrade to Data.com Premium Prospector and Data.com Premium Clean.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

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

IN THIS SECTION:

Data.com Prospector

Use Data.com Prospector to search valuable company information from Dun & Bradstreet and millions of crowd-sourced contacts to find the records your business needs. Add these records to Salesforce as new accounts, contacts, and leads, or export them to use in other apps. It's a great way to get the data you need to plan your sales territories, segment campaigns, find new accounts to engage, and expand your sales network.

Data.com Clean

Data.com Clean provides a number of ways to keep your Salesforce CRM records up to date by leveraging company information from D&B and millions of crowd-sourced contacts. There are two versions of the Data.com Clean product: Corporate Clean and Premium Clean. They differ based on the D&B fields that are available when you clean account or lead records.

Data.com Social Key

Data.com Social Key works with Social Accounts and Contacts and Data.com Clean to make it easier to learn more about your contacts and leads in Salesforce or on social network sites. Your organization must have Data.com Clean enabled to use Social Key.

SEE ALSO:

Data.com Clean

Prospect for Companies, Contacts, and Leads Right in Salesforce

Data.com Prospector

Use Data.com Prospector to search valuable company information from Dun & Bradstreet and millions of crowd-sourced contacts to find the records your business needs. Add these records to Salesforce as new accounts, contacts, and leads, or export them to use in other apps. It's a great way to get the data you need to plan your sales territories, segment campaigns, find new accounts to engage, and expand your sales network.

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

All Salesforce users can search Data.com for accounts and contacts. Users with a Data.com Prospector license can:

- Add accounts and contacts to Salesforce, and add contacts as leads.
- Add contacts for an account directly from the account record.
- Export accounts and contacts from Data.com.
- Manually clean Salesforce account, contact, and lead records, regardless of whether they were added from Data.com.
- Get prospecting insights into accounts' business, financial, competitive, and industry details.
- Get company hierarchical views of parent-child relationships and account information, such as the annual revenue, ownership, and number of employees. (Available to Data.com Premium Prospector users as a beta feature.)

There are two versions of Data.com Prospector: Corporate Prospector and Premium Prospector. They differ based on the Dun & Bradstreet fields that are included when you add or manually clean account or lead records. Premium Prospector users also have access to the Company Hierarchy page.

Data.com Prospector Version	Dun & Bradstreet (D&B) Fields
Data.com Corporate Prospector	Basic set of Dun & Bradstreet fields.
Data.com Premium Prospector	Basic set of Dun & Bradstreet fields, plus the `D&B Company` field. This field links to an associated Dun & Bradstreet Company record with over 70 additional Dun & Bradstreet fields that are accessible on the `D&B Companies` tab. The Company Hierarchy page provides a hierarchical view of Dun & Bradstreet company relationships.

Organizations that purchased Data.com prior to December 16, 2011 may still be using an earlier version of the product with a limited set of fields. We're retiring this version in Summer '14. For information about upgrading to Data.com Prospector, contact your Salesforce account manager. The Salesforce Help refers to the Data.com Prospector product unless otherwise noted.

IN THIS SECTION:

Use Data.com Prospector to prospect for new companies and contacts in the industries and locations that you're most interested in. Add new account, contact, and lead records to Salesforce or export them to use in other apps. You can search valuable company, industry, and financial information from Dun & Bradstreet® and millions of crowd-sourced contacts to get the data you need when you need it.

Prospect for Companies, Contacts, and Leads Right in Salesforce

Use Data.com Prospector to prospect for new companies and contacts in the industries and locations that you're most interested in. Add new account, contact, and lead records to Salesforce or export them to use in other apps. You can search valuable company, industry, and financial information from Dun & Bradstreet® and millions of crowd-sourced contacts to get the data you need when you need it.

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:

Prospect for Companies Fast Right In Salesforce

With a Data.com Prospector license, it's a cinch to find new companies in the industries and locations that you're most interested in. Add company information to Salesforce as new accounts in just a few steps.

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

1. Click the Data.com tab.
2. Click **Find Accounts**.
3. Enter or select your search criteria. When you click the selection box in the `Industry` field, for example, you'll see the Industry Selector, where you can use industry classifications to select from extensive lists of industries and subindustries to build an industry query as part of your search criteria. When you click the selection box in the `Location` field, you'll see the Location Selector, where you can build a location query as part of your search criteria.
4. Click **Search**. Results are sorted by number of active contacts.
   To show records that have been flagged as inactive, under Options, select `Show Inactive Records`. Inactive records are marked with .
5. If the results list is long, you can:
   - Sort the results by any table heading. The `Updated` heading, for example, sorts results by when they were last updated.
   - Jump to a page by entering a number in the `Page` field.
   - Click the arrows to move from page to page.
6. If you don't see what you're looking for, use filters to narrow your results. Expand filter categories as needed. Enter a range or select the checkbox next to each filter you want to apply.
7. Add all accounts or a selection to Salesforce.
   - To add all accounts, click **Add to Salesforce** and select *`All`*.
   - To add selected accounts, select the ones you want, then click **Add to Salesforce** and choose *`Selected`*.
8. Click **Continue**.
   If your selection includes duplicates, we'll add them if duplicate account records are allowed in your Salesforce organization. Adding more than 200 records can take a few minutes. If you add that many, we'll send you an email when the process is complete.
9. From the confirmation message, click **Go to Accounts** to view the list of new records on the Accounts home page.

   If you use Data.com Premium Prospector, when you add an account from Data.com, a corresponding D&B Company record (if one exists in Data.com) is automatically created in Salesforce and linked to the account record via its `D&B Company` field.

SEE ALSO:

Guidelines for Prospecting for Companies, Contacts, and Leads in Salesforce

Record Icons in Data.com Search Results

Understand Data.com Searches

Prospect for Leads Fast Right In Salesforce

Need leads? With a Data.com Prospector license, you can find contacts in the companies, industries, and locations that you're most interested in. Then, add records to Salesforce as new leads.

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 Data.com contacts as leads:

- "Create" on leads

1. Go to the Data.com tab.
2. Using the Find Contacts tab, enter or select your search criteria. When you click the selection box in the `Industry` field, for example, you'll see the Industry Selector, where you can use industry classifications to select from extensive lists of industries and subindustries to build an industry query as part of your search criteria. When you click the selection box in the `Location` field, you'll see the Location Selector, where you can build a location query as part of your search criteria.
3. Click **Search**.
   Results are sorted alphanumerically. To show records that have been flagged as inactive, under Options, select `Show Inactive Records`. Inactive records are marked with .
4. If the results list is long, you can:
   - Sort the results by any table heading. The `Updated` heading, for example, sorts results by when they were last updated.
   - Jump to a page by entering a number in the `Page` field.
   - Click the arrows to move from page to page.

     Sorting and page navigation only work for lists of fewer than 100,000 records.
5. If you don't see what you're looking for, use filters to narrow your results. Expand filter categories as needed. Enter a range or select the checkbox next to each filter you want to apply.
   The list updates automatically.
6. Select the contacts you want to add, and click **Add to Salesforce**.
7. Select *`Leads`* to add the records as leads and click **Continue**.
   If your selection includes duplicates, we'll add them if duplicate lead records are allowed in your Salesforce organization. Adding more than 200 records can take a few minutes. If you add that many, we'll send you an email when the process is complete.
8. Click **Go to Leads** to view the list of new records on the Leads home page.

   If you use Data.com Premium Prospector, when you add a lead from Data.com, a corresponding D&B Company record (if one exists in Data.com) is automatically created in Salesforce and linked to the lead record via its `D&B Company` field.

SEE ALSO:

Prospect for Key Contacts at Your Accounts

Prospect for Contacts Fast Right In Salesforce

Need contacts? With a Data.com Prospector license, you can find contacts in the companies, industries, and locations that you're most interested in. Then, add records to Salesforce as new leads.

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 search Data.com for contacts:
- No permissions required

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

To create an account when adding contacts:
- "Create" on accounts

1. Go to the Data.com tab.
2. Using the Find Contacts tab, enter or select your search criteria. When you click the selection box in the `Industry` field, for example, you'll see the Industry Selector, where you can use industry classifications to select from extensive lists of industries and subindustries to build an industry query as part of your search criteria. When you click the selection box in the `Location` field, you'll see the Location Selector, where you can build a location query as part of your search criteria.
3. Click **Search**.
   Results are sorted alphanumerically. To show records that have been flagged as inactive, under Options, select `Show Inactive Records`. Inactive records are marked with .
4. If the results list is long, you can:
   - Sort the results by any table heading. The `Updated` heading, for example, sorts results by when they were last updated.
   - Jump to a page by entering a number in the `Page` field.
   - Click the arrows to move from page to page.

     Sorting and page navigation only work for lists of fewer than 100,000 records.
5. If you don't see what you're looking for, use filters to narrow your results. Expand filter categories as needed. Enter a range or select the checkbox next to each filter you want to apply.
   The list updates automatically.
6. Add all contacts or a selection to Salesforce.
   - To add all contacts, click **Add to Salesforce** and select **All**.
   - To add selected contacts, first select the ones you want, then click **Add to Salesforce** and choose *`Selected`*.

   You'll get a confirmation message showing the number of records you're adding.
7. Select **Contacts**.
   Enter or select the account you want to associate the contacts with. You can associate only one account. If you need to create the account to associate, use the lookup.
8. Click **Continue**.
   If your selection includes duplicates, we'll add them if duplicate contact records are allowed in your Salesforce organization. Adding more than 200 records can take a few minutes. If you add that many, we'll send you an email when the process is complete.
9. Click **Go to Account** to return to the account record.

SEE ALSO:

Guidelines for Prospecting for Companies, Contacts, and Leads in Salesforce

Record Icons in Data.com Search Results

Understand Data.com Searches

Prospect for Key Contacts at Your Accounts

Need to find the right contact at one of your accounts? With a Data.com Prospector license, it's a cinch to search for contacts at your companies by title, location, and industry. Then, with a click, you can add those records to Salesforce.

Before you begin, make sure the `Get Contacts` button has been added to the Account page layout.

1. Go to the detail page of the account you want to add contacts for.
2. Click **Get Contacts**. From the drop-down, either:
   - Select a filter to narrow your results by level or department, or
   - Select **All...** to see all contacts for the account.

   The Data.com tab opens and displays a list of contacts that match the account name and any filters you selected. For example, if you want to get manager contacts at Universal Telco, go to Universal Telco's account detail page. Click **Get Contacts** and under `By Level`, select the *`Manager-Level`* filter. The Data.com tab opens with a list of managers at Universal Telco.
3. Select more filters if you need a more targeted list. Expand filter categories as needed. Enter a range or select the checkbox next to each filter you want to apply.
4. Add all contacts or a selection to Salesforce.
   - To add all contacts, click **Add to Salesforce**.
   - To add selected contacts, first select the ones you want, then click **Add to Salesforce** and choose *`Selected`*.
5. Select **Contacts** to add the records as contacts associated with the account you started from. They'll be associated with the account you started from.
6. Click **Continue** to add the records.
   If your selection includes duplicates, we'll add them if duplicate contact records are allowed in your Salesforce organization. Adding more than 200 records can take a few minutes. If you add that many, we'll send you an email when the process is complete.
7. Click **Go to Account** to return to the account record.

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 get Data.com contacts from an account:

- "Read" on accounts

  AND

  "Create" on contacts

SEE ALSO:

Prospect for Contacts Fast Right In Salesforce

Prospect for Leads Fast Right In Salesforce

Record Icons in Data.com Search Results

Considerations for Prospecting for Data.com Contacts in Salesforce

Data.com Prospector customers can find the contacts they need from an `Account` page and add them to their organizations in just a few clicks.

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

The **Get More Contacts** button opens an interactive dialog for finding and adding Data.com contacts to your organization. This streamlined experience gets you the contacts you need when you need them, right from the Account page.

Here are a few things for you to know about `Get More Contacts`.

Limitation	Description
Maximum 200 contacts	You can add up to 200 contacts in a single request. When you select more than 200 contacts, you are asked to deselect some of the contacts.
Filters	• Filters are connected by a logical AND operator. • Add just one of each filter. Adding more than one of each filter can cause unpredictable results. • `Department`—Select 1 or more departments from the scrollable list. • `Level`—Select 1 or more levels from the scrollable list. • `Title`—Enter a single title or a comma-separated list of titles.
Account must be clean	`Get More Contacts` works on clean accounts only. Clean accounts have been imported from Data.com, or your organization has cleaned the account after the record was added to your organization. If the selected account is not clean, talk with your administrator about how to clean the account.

Filter Contacts from Get More Contacts List View

Filter available Data.com results for the selected account then add the contacts you need.

You need a Data.com Premium Prospector license.

You have different options depending on the field you want to filter. You can filter by Title, Department, and Level.

- Filters are connected by a logical AND operator.
- Add just one of each filter. Adding more than one of each filter can cause unpredictable results.
- `Department`—Select 1 or more departments from the scrollable list.
- `Level`—Select 1 or more levels from the scrollable list.
- `Title`—Enter a single title or a comma-separated list of titles.

1. From the **Get More Contacts** dialog, click .
2. Click **Add Filter**.
3. Under **New Filter**, select a filter to add.
4. Under Value, select or enter the values you want.
5. Click **Done**.
6. To set another filter, click **Add Filter**.
7. To remove a filter, click .
8. To apply and save filters, click **Save**.

Prospect for Company Data to Use in Other Apps

With a Data.com Prospector license, you can export accounts to use in other apps. Search valuable company data from Dun & Bradstreet®, and narrow your results to target the industries and locations that you're most interested in.

Exporting records creates a comma-separated value (.csv) file that you can open in Microsoft® Excel® or other apps that support .csv format.

How we provide the export file depends on:

- The number of records you export. If you export fewer than 200 records, a message with a link to the export file on the Files tab is displayed. If you export 200 or more records, we send you an email with a link to the export file on the Files tab.
- If you don't have Chatter enabled, we send you an email with the export file attached.

The account fields that we export include:

- `Jigsaw` (the account's `Data.com Key`)
- `Name`
- `Website`
- `Phone`
- `BillingStreet`
- `BillingCity`
- `BillingStateCode`
- `BillingPostalCode`
- `BillingCountry`
- `Industry`
- `NumberOfEmployees`
- `AnnualRevenue`
- `Ownership`
- `TickerSymbol`
- `Fax`
- `FipsMsaCode` (available with Data.com Premium Prospector only)
- `Sic`
- `SicDesc`
- `NaicsCode`
- `NaicsDesc`
- `StockExchange` (available with Data.com Premium Prospector only)
- `SalesVolumeReliability` (available with Data.com Premium Prospector only)
- `EmployeesTotalReliability` (available with Data.com Premium Prospector only)
- `Data.com Last Updated Date`
- `BillingState` (available with state and country picklists only)
- `BillingCountryCode` (available with state and country picklists only)

Here's how you can export Data.com account records.

1. Start from a list of Data.com account search results.

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 export Data.com accounts records:

- "Read" on accounts

2. Export all accounts or a selection.
   - To export all accounts, click **Export Results** and choose `All`.
   - To export selected accounts, select the ones you want, then click **Export Results** and choose `Selected`.
3. If the number of records you've selected to export *is equal to or less than* your record balance, choose to either:
   - Export all records; or
   - Export all records except those records already in Salesforce ( ) or already purchased (added or exported) by any Data.com user in your organization ( ).

   If the number of records you've selected to export *exceeds* your record balance, we let you know. You can then proceed to export as many records as your balance and other settings allow without having to adjust your selection. When exporting more than your balance, you can either:
   - Include records already purchased ( ) along with new records; or
   - Exclude all selected records that your organization already owns (or).

     See the example that follows.
4. Click **Continue**.
   A dialog box appears. The dialog has a link to the export file on the Files tab, or we tell you that the export file was sent to your email.

Example: For example: you have a record balance of 50, but you select 150 account records to export. You opt to export both new and already purchased records. You previously purchased 30 of the selected records that are already in your organization. We export the 30 previously purchased records, plus 50 of the remaining new records. After the export, your record balance will be 0.

SEE ALSO:

Guidelines for Prospecting for Companies and Contacts to Use in Other Apps

Prospect for Contact and Lead Data to Use in Other Apps

With a Data.com Prospector license, you can export contacts to use in other apps. Search a crowd-sourced database of millions of contacts, and narrow your results to target the companies, titles, industries, and locations that you're most interested in.

Exporting creates a comma-separated value (.csv) file that you can open in Microsoft® Excel® or any other app that supports .csv format. If your organization respects Do-Not-Contact settings, contact records with `Do Not Call` or `Email Opt Out` selected have blank `Phone` or `Email` fields in .csv files.

How we provide the export file depends on:

- The number of records you export. If you export fewer than 200 records, a message with a link to the export file on the Files tab is displayed. If you export 200 or more records, we send you an email with a link to the export file on the Files tab.
- If you don't have Chatter enabled, we send you an email with the export file attached.

The contact fields that are exported are:

- `Jigsaw` (the contact's `Data.com Key`)
- `FirstName`
- `LastName`

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 export contacts:
- "Read" on contacts

- `Title`
- `Phone`
- `Email`
- `MailingStreet`
- `MailingCity`
- `MailingStateCode`
- `MailingPostalCode`
- `MailingCountry`
- `AccountName`
- `NumberofEmployees`
- `AnnualRevenue`
- `Department`
- `Industry`
- `Data.com Last Updated Date`
- `MailingState` (available with state and country picklists only)
- `MailingCountryCode` (available with state and country picklists only)

Here's how to export Data.com contact records.

1. Start from a list of Data.com contact search results.
2. Export all contacts or a selection.
   - To export all contacts, click **Export Results** and choose *`All`*.
   - To export selected contacts, select the ones you want, then click **Export Results** and choose *`Selected`*.
3. If the number of records you've selected to export is equal to or less than your record balance, choose to either:
   - Export all records; or
   - Export all records except those records already in Salesforce ( ) or already purchased (added or exported) by any Data.com user in your organization ( ).

   If the number of records you've selected to export *exceeds* your record balance, we let you know. You can then proceed to export as many records as your balance and other settings allow without having to adjust your selection. When exporting more than your balance, you can either:

   - Include records already purchased ( ) along with new records; or
   - Exclude all selected records that your organization already owns (or).

     See the example that follows.
4. Click **Continue**.
   A dialog box appears. The dialog has a link to the export file on the Files tab, or it tells you that the export file was sent to your email.

Example: For example: you have a record balance of 50, but you select 150 account records to export. You opt to export both new and already purchased records. You previously purchased 30 of the selected records that are already in your organization.

We export the 30 previously purchased records, plus 50 of the remaining new records. After the export, your record balance will be 0.

SEE ALSO:

Guidelines for Prospecting for Companies and Contacts to Use in Other Apps

Prospect for Companies in the Same Corporate Hierarchy (Beta)

Data.com Company Hierarchy uses Dun & Bradstreet company data in Data.com to display a hierarchical view of companies. It shows parent-child relationships and account information, such as the annual revenue, ownership, and number of employees.

Data.com Company Hierarchy uses Dun & Bradstreet data to create a hierarchical view of an account displaying its relationship with related companies. To add an account to your Salesforce organization, click the **Add Account** button next to the account.

Company Hierarchy is available as a standard feature for Data.com Premium Prospector customers. Company Hierarchy is built using Dun & Bradstreet company data. In addition to showing the relationships between corporate entities, you can see the associated annual revenue and number of employees at different entities in the hierarchy. Information from your Salesforce organization is also included to provide more context, such as whether an entity exists as an account record, along with the listed account owner. Using this information, sales reps can identify relevant prospective customers, and then add them as accounts to your Salesforce organization with the click of a button directly from the hierarchy view.

This release contains a beta version of Data.com Company Hierarchy that is production quality. You can provide feedback and suggestions for Company Hierarchy on the IdeaExchange. For information on enabling this feature for your organization, contact Salesforce.

The Data.com Company Hierarchy shows you different company types and how they are related.

Company Type	Description
Global Headquarters	The highest organizational entity in a corporate hierarchical structure that oversees domestic or international companies and subsidiaries.
Domestic Headquarters	The highest level member in a corporate hierarchy within a single country. A DHQ typically reports to a GHQ.
Headquarters	A company that owns branches, divisions, or subsidiaries and has financial responsibility for the companies that report to it.
Branch	A secondary location of a headquarters.
Single Location	A company with no branches or subsidiaries.
Unmarketable	This company is unmarketable, and record details are intentionally hidden. You can't add this record from the hierarchy, but you can view or add active, linked accounts.

IN THIS SECTION:

View the Company Hierarchy for Accounts

Data.com Company Hierarchy displays a hierarchical relationship of accounts with important account details. View parent-child relationships and account information, such as the annual revenue, ownership, and number of employees.

Find New Accounts Using the Global Ultimate D-U-N-S Number

If you use Data.com Premium Prospector, it's a cinch to find new companies to do business with that are in the company hierarchy of existing accounts. Just do a search by Global Ultimate D-U-N-S Number right from a D&B Company record. You'll be able to see other companies within the same corporate structure and add those companies to Salesforce as new accounts.

Guidelines for Adding Accounts in the Same Company Hierarchy to Salesforce

Data.com Company Hierarchy searches Data.com for Dun & Bradstreet company records and displays company linkages in a hierarchical view. From the Company Hierarchy, you can add account records to Salesforce. Here are some guidelines to follow when you add Data.com records to Salesforce from Company Hierarchy.

View the Company Hierarchy for Accounts

Data.com Company Hierarchy displays a hierarchical relationship of accounts with important account details. View parent-child relationships and account information, such as the annual revenue, ownership, and number of employees.

Data.com Company Hierarchy is available with Data.com Premium Prospector licenses.

Before you can use Data.com Company Hierarchy, your administrator must add the **Company Hierarchy** button to Account page layout, see Configure Page Layouts for Data.com Prospector and Data.com Clean.

1. Open an account detail page.
2. Click Data.com Company Hierarchy .

EDITIONS

Available in: Salesforce Classic

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited** Editions

Find New Accounts Using the Global Ultimate D-U-N-S Number

If you use Data.com Premium Prospector, it's a cinch to find new companies to do business with that are in the company hierarchy of existing accounts. Just do a search by Global Ultimate D-U-N-S Number right from a D&B Company record. You'll be able to see other companies within the same corporate structure and add those companies to Salesforce as new accounts.

The Global Ultimate is the highest entity within an organization and is identified by a nine-digit Global Ultimate D-U-N-S Number. All companies that are part of the same corporate structure as the Global Ultimate are identified by the same Global Ultimate D-U-N-S Number.

Note: Before you can search by Global Ultimate D-U-N-S Number, the `Search Global Ultimate D-U-N-S` button must be added to the D&B Company page layout.

1. Go to the detail page of the D&B Company record you want to find accounts with the same Global Ultimate D-U-N-S Number for.
2. Click **Search Global Ultimate D-U-N-S**.
   The Data.com tab opens and displays a list of accounts that match the Global Ultimate D-U-N-S Number of the D&B Company record.
3. If the results list is long, you can sort the results by any table heading. The **Location Type** heading, for example, sorts results by headquarters, single location, and branch.
4. If you don't see what you're looking for, use filters to narrow your results.
5. For more information about a particular account, such as its account site, click the account name to see its account card.
6. Add all accounts or a selection to Salesforce.

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

7. From the confirmation message, click **Go to Accounts** to view the list of new records on the Accounts home page.

Here are some things to keep in mind when searching by Global Ultimate D-U-N-S Number.

- Global Ultimate D-U-N-S Number search results *only* include accounts that are in Data.com, so you may not get *complete* Global Ultimate D-U-N-S results if some members of the corporate structure are not in Data.com.
- You can use filters to narrow down your Global Ultimate D-U-N-S Number search results.
- You can export records from your Global Ultimate D-U-N-S Number search results.
- You can't save the search.

SEE ALSO:

Prospect for Companies Fast Right In Salesforce

Guidelines for Adding Accounts in the Same Company Hierarchy to Salesforce

Data.com Company Hierarchy searches Data.com for Dun & Bradstreet company records and displays company linkages in a hierarchical view. From the Company Hierarchy, you can add account records to Salesforce. Here are some guidelines to follow when you add Data.com records to Salesforce from Company Hierarchy.

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

- A green dot ( ) appears in the search results next to records already in Salesforce. These records can't be added again unless they have first been deleted from Salesforce, or your organization allows duplicates.

  Tip: If a record is already in Salesforce, hover over the green dot and click the link to go directly to the record.

- You can add only one record at a time from Company Hierarchy.
- Records are considered duplicates when they have the same Data.com ID number in the `Data.com Key` field. When a duplicate record is added, it isn't counted against your record addition balance.
- If you can't add a record to Salesforce because of errors, we'll notify you and provide the error details in a .csv file.

Guidelines for Prospecting for Companies, Contacts, and Leads in Salesforce

Check out some guidelines to follow when prospecting for new companies and contacts with 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

- A green dot ( ) appears in the search results next to records already in Salesforce. These records can't be added again unless they have first been deleted from Salesforce, or your organization allows duplicates.

  Tip: If a record is already in Salesforce, hover over the green dot and click the link to go directly to the record.

- A blue checkmark ( ) appears in search results next to records you've already purchased (added or exported) from Data.com. When you add Data.com contacts or accounts, each one counts against your record addition balance. If you add records you've already exported from Data.com, the added records don't count against your record addition balance.
- If the number of records you've selected to add *exceeds* your record addition balance, we'll let you know. You can proceed to add as many records as your balance and other settings allow.
- Regardless of your record addition limit or your record addition balance, you can't manually select more than 1,000 records at a time.

- Regardless of your record addition limit or your record addition balance, you can't add more than 100,000 records at a time.
- 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. When a duplicate record is added, it will *not* be counted against your record addition balance.
- If you can't add one or more records to Salesforce because of errors, we'll notify you and provide the error details in a .csv file.
- If your search produces a large number of results, you won't see any data past page 10. If this happens, you can refine your search to get the results you want. See How can I see complete, relevant information for Data.com search results?

IN THIS SECTION:

Narrow Your Prospecting Search Results to Target What You're Interested In

With a Data.com Prospector license, you can use search fields and modifiers to target just the companies, industries, and locations that you're interested in. Then, it's easy to save your searches.

Guidelines for Prospecting for Companies and Contacts to Use in Other Apps

Here are some things to consider when exporting records from Data.com.

Using Data.com FAQ

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

SEE ALSO:

Prospect for Companies, Contacts, and Leads Right in Salesforce

Record Icons in Data.com Search Results

Guidelines for Prospecting for Companies and Contacts to Use in Other Apps

Limitations with Prospecting for Companies, Contacts, and Leads in Salesforce

Narrow Your Prospecting Search Results to Target What You're Interested In

With a Data.com Prospector license, you can use search fields and modifiers to target just the companies, industries, and locations that you're interested in. Then, it's easy to save your searches.

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

IN THIS SECTION:

Understand Data.com Searches

Learn how the Data.com search features work, what fields are searched, and how to refine your search results using filters and location criteria so you can easily find the records most valuable to your business.

Understand Data.com Search Modifiers

When searching for Data.com accounts and contacts, you can use modifiers to target and narrow your search results. Here's how modifiers work, field by field.

How Is Industry Determined for Records in Data.com?

We use the primary SIC (Standard Industry Classification) code to determine the value of the `Industry` field on account cards and account records in Data.com. By using only the primary SIC code for this industry mapping, we're able to provide a more consistent and accurate value in the `Industry` field, which leads to more relevant search results, regardless of the industry classification system you use in your search query.

Data.com Industry Selector

When searching for accounts and contacts in Data.com, use the industry selector to add industries and subindustries to your search criteria.

Data.com Location Selector Fields

When you search for accounts and contacts in Data.com, use the location selector to add location criteria to your search query.

Record Icons in Data.com Search Results

When you search Data.com for accounts and contacts, you might see one or more icons next to the records in your search results.

Understand Data.com Searches

Learn how the Data.com search features work, what fields are searched, and how to refine your search results using filters and location criteria so you can easily find the records most valuable to your business.

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

Searching Data.com for CRM records is simple. Start your search by entering search criteria in the fields on the Data.com tab. You can also use search modifiers to target and narrow your search results. Depending on your entries and selections, you may end up with a large list of accounts or contacts. To find out how many, check the results list's header or footer. Click the **Reset Search** link if you need to clear all your entries and selections. You'll see your search results until you start a new search or refresh your browser page.

For account searches, the Data.com search results you get are based on the company name, the website of the parent company, and the websites of the parent company's subsidiaries and branch locations, if any, so your results may include companies that you didn't actually search for. For example, if you want to find Sun Microsystems and you enter either *`Sun Microsystems`* or *`sun.com`* in the `Company or Website` field, the results will also include Oracle Corporation because Oracle is the parent company of Sun Microsystems.

Also, account searches are based on both the `Account Name` field and the `Tradestyle` field. So, for example, if you are looking for United Parcel Services, you can search on its tradestyle, *`UPS`*, and still see `United Parcel Services, Inc.` in your search results.

Once you have a set of records, you can narrow your list by using filters if you need to. Just look for the filter categories at the left of the page, and select the checkboxes for the filters you need. Some searches generate filter options that are specific to your results. For example, if you want leads in `Healthcare, Pharmaceuticals & Biotech` industry—specifically `Doctors & Health Care Practitioners`—the list of filters in the Title category might include `Doctor`, `Chiropractor`, `Dentist`, and `Office Manager`. For searches that generate a large list of results for `Title`, `Company Name`, and `Website Domain Type` filters, we show the 25 filters with the most search results. To see a shorter list of filters, narrow your initial search.

Some filter categories are expanded automatically when you run a search, but you can click the links at the top of the Filters panel to expand or collapse them all. As you select filters, the search results list is updated automatically.

For example, if you search for contacts from your IBM account detail page, the Data.com tab will open and automatically enter IBM's URL, *`www.ibm.com`*, in the `Company or Website` field on the Find Contacts subtab. The search will generate a list of thousands of IBM contacts all over the world. That's probably more than you need, so you can either:

- Refine your initial search by selecting location criteria (such as *`Australia`* or *`United States`*) or industry options (like *`Computers & Electronics`* or *`Financial Services`*)
- Narrow your search results list by selecting filters such as *`Human Resources`*, *`C-Level`*, or *`Program Manager`* or
- Select *`IBM`* in the `Company Name` filter category.

By refining your search criteria and filtering your results, you can narrow your list from more than 30,000 contacts to the 25 or so you want to call or email.

SEE ALSO:

Understand Data.com Search Modifiers

Understand Data.com Search Modifiers

When searching for Data.com accounts and contacts, you can use modifiers to target and narrow your search results. Here's how modifiers work, field by field.

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 search Data.com for accounts:

- No permissions required

To search Data.com for contacts:

- No permissions required

Company or Website

- To search for or exclude multiple companies, separate them with commas: **,**. For example, `salesforce.com,Apple` returns results for both salesforce.com and Apple (for example, Apple Computer, Inc. and Apple Inc.), or either one, depending on Data.com data.
- To search for the exact name of a company, type the name within quotation marks: **" "**. For example, `"Apple, Inc."` returns only results with the exact company name Apple, Inc.
- To exclude a company from your results, before the company name, type a minus sign: **–**. For example, `–Oracle` returns a list of results that excludes Oracle. For company names with more than one word, after the minus sign, type the first part of the name. For example, `–Adobe` returns a list of results that excludes Adobe Systems.
- You can also use mixed search modifiers. For example, `salesforce, –Microsoft, "GE Healthcare"` returns all results including salesforce (for example, salesforce and salesforce.com, inc.); it excludes all results containing Microsoft; and it finds GE Healthcare but not GE Health Care.

Title

- To exclude a title, before the title, type a minus sign: **–**. For example: –buyer.
- To search for exact titles, type them within quotation marks: **" "**. For example: "Managing Director".
- To search for multiple titles, separate them with commas: **,**. For example: `CEO,–Dr,"managing director"`.

Name or Email

- To search for results for an individual element in this field—just Name or just Email—type that element followed by a colon (**:**) and a space, then type the name, or email you're looking for. For example, `Name: Marc Benioff` returns results with only the name Marc Benioff. `Email: marcbenioff@salesforce.com` returns results with only the email address marcbenioff@salesforce.com.
- Modifiers will not work if you don't include "name: " or "email: ", and you can't mix and match these modifiers (for example, using "name: " and "email: " in the same search).
- To search for multiple names or emails, separate them with commas: **,**.
- To search for exact titles, names, or emails, type them within quotation marks: **" "**.
- To exclude a title, name, or email from your results, before the element, type a minus sign: **–**.

Location | City

- To search for multiple cities, separate them with commas: **,**. For example, `San Francisco, San Jose` returns results for both San Francisco and San Jose, or either one, depending on Data.com data.
- To search for exact cities, type them within quotation marks: **" "**. For example, `"San Francisco"`, won't return results for South San Francisco. Similarly, `"South San Francisco"` won't return any results for San Francisco.

Location | Postal/ZIP Code

- To search for multiple postal or ZIP codes, separate them with commas: **,**. For example, *94105,94122* returns results for both 94105 and 94122, or either one, depending on Data.com data.
- To exclude a postal or ZIP code from your results, before the code, type a minus sign: **–**. For example, *–94122* returns a list of results that excludes 94122.

Location | Area Code

- To search for multiple area codes, separate them with commas: **,**. For example, *312,708* returns results for both 312 and 708, or either one, depending on Data.com data.
- To exclude an area code from your results, before the area code , type a minus sign: **–**. For example, *–708* returns a list of results that excludes 708.
- To find area codes outside the United States and Canada, add the country calling code as a prefix. For example, the United Kingdom's country calling code is *44*, and London's area code is *20*, so to find accounts or contacts in London by area code, enter *4420* in the `Area Code` field.

SEE ALSO:

Understand Data.com Searches

Data.com Location Selector Fields

How Is `Industry` Determined for Records in Data.com?

We use the primary SIC (Standard Industry Classification) code to determine the value of the `Industry` field on account cards and account records in Data.com. By using only the primary SIC code for this industry mapping, we're able to provide a more consistent and accurate value in the `Industry` field, which leads to more relevant search results, regardless of the industry classification system you use in your search query.

A limited number of Data.com accounts show `Data.com - Jigsaw` as the value of the `Source` field on their account card. These accounts do not have a value for the SIC code, and so their `Industry` value is determined using a different system. Contact Salesforce Customer Support for details.

Example: You're searching Data.com for accounts with a SIC industry value of *Computer Peripheral Equipment*, which maps to `Electronics` in Data.com. Your Data.com search results will include all accounts with a value of `Electronics` in the `Industry` field. If you use the Data.com Industry Categories classification system and select the *Computers and Electronic* industry, which also maps to `Electronics`, your results will again include all accounts with a value of `Electronics` in the `Industry` field.

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 Industry Selector

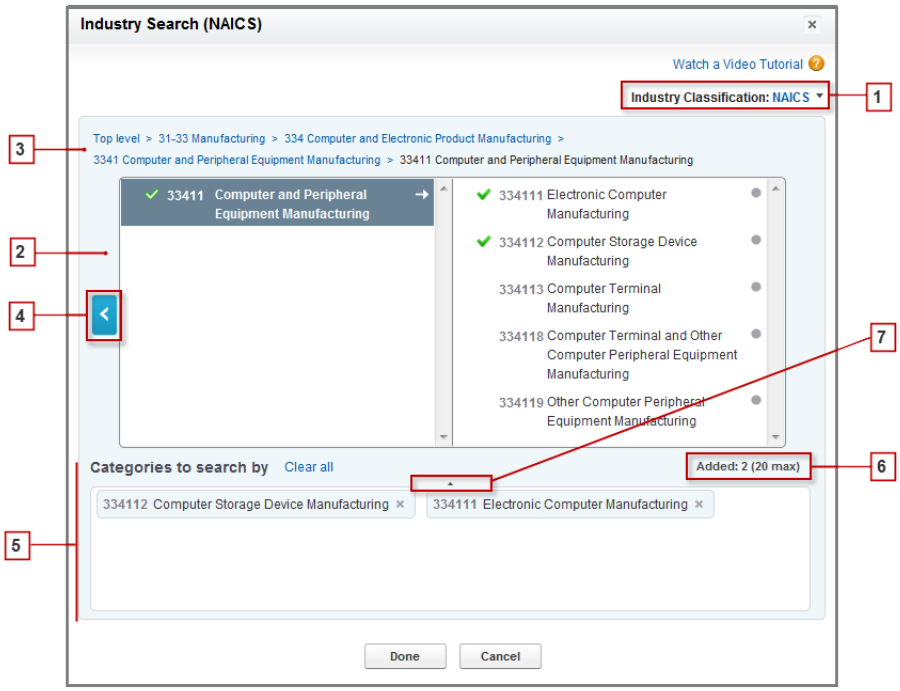
When searching for accounts and contacts in Data.com, use the industry selector to add industries and subindustries to your search criteria.

Here's how it works.

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



1. Select the industry classification system your organization uses.
   - `NAICS` (North American Industry Classification System): Used by business and government to classify North American business establishments according to the type of economic activity. This system includes 20 industry sectors, each with multiple levels of subindustries Industries and subindustries are identified by numeric code, up to six digits.
   - `SIC` (Standard Industry Classification): Used by the United States government to classify business establishments according to the type of economic activity. This system includes 10 industry sectors, each with multiple levels of subindustries Industries and subindustries are identified by numeric code, up to four digits.
   - `Data.com Industry Categories`: The Data.com system of classifying business establishments by industry and subindustry.

   You can select a different industry classification system at any time, but doing so will clear your selections.
2. Use the selection panels to explore industries and their subindustries and add them to your search. If an industry has a numeric classification code, you'll see it here. When you hover over an industry name, you'll get two options.

- Click the industry name to view its subindustries, if any, in the right panel. If an industry has any available subindustries, you'll see an arrow to the right of the industry name.
- Click `Add` to add the industry (including all its subindustries) to the **Categories to search by** (Categories) box.

When you click an industry name in the right panel, it moves to the left panel and its subindustries appear in the right panel. You can continue moving through the industry levels in this manner, adding any industries and subindustries you want to search on as you go. A circle to the right of a subindustry name means you have reached the final level of subindustries. When you add an industry to your search criteria, it appears in the Categories box and all of its subindustries are automatically included. You'll also see a solid green checkmark next to its name. Only the industry, however, appears in the Categories box.

To remove industries from the Categories box, hover over the industry name and click the . If you remove any subindustries from the selection panel, the industry is removed from the Categories box, and its remaining subindustries appear instead. (This partial selection is denoted by an outlined green checkmark next to the industry name.) Keep in mind that if you select some but not all subindustries within an industry, the number of selections in the Categories box increases.

3. Use the navigation links at the top of the page to keep track of where you are within the industry levels. Click any link to return to that industry level in the selection panels.
4. Click the **Back** arrow to move up one industry level.
5. All industries and subindustries that you add to your search appear in the **Categories to search by** box. You can remove individual selections by clicking the next to the industry or subindustry name. Clicking **Clear all** removes *all* your selections.
6. There's a limit on how many industries and subindustries you can add to one search. If you exceed the limit, you'll need to remove selections in order to continue your search.
7. If the **Categories to search by** box includes a long list of industries, you may need to click the arrow to expand the box to view them all.

Here's an example of how the industry selector works. John is looking for companies that manufacture computers. He decides to use the North American Industry Classification System (NAICS) and begins by clicking the **Manufacturing** industry to reveal its subindustries, which include **Food Manufacturing**, **Machinery Manufacturing**, and lots more. He finds **Computer and Electronic Product Manufacturing**, and clicks it, moving it to the left panel to reveal its subindustries in the right panel. He continues to navigate deeper in to the industry levels in this manner, clicking through subindustries until he ultimately finds what he's looking for: **Computer and Peripheral Equipment Manufacturing**. John clicks `Add` to add two subindustries, **Electronic Computer Manufacturing** and **Computer Storage Device Manufacturing**, to the **Categories to search by** box. Those selections remain in the Categories box even if he navigates to other levels in the selection panel and adds other industries. When he is finished adding industries to the Categories box, he does a last review of his selections, then happily clicks `Done` to return to the Data.com tab to complete his search.

SEE ALSO:

Understand Data.com Searches

Data.com Location Selector Fields

When you search for accounts and contacts in Data.com, use the location selector to add location criteria to your search query.

Here are the fields available with the location selector.

Field	Definition
`Country`	The country or countries where you want to find accounts or contacts. There are over 200 countries available for account searches. There is a limited number of countries available for contact searches. To jump to a country in the list, type the first few letters of the country you're looking for.
`State`	The state or states where you want to find accounts or contacts. This field also includes counties, provinces, and other distinct geographical regions. You must select a single country first. Not all countries have states. To jump to a state in the list, type the first few letters of the state you're looking for.
`City`	The city or cities, where you want to find accounts or contacts. You must select a single country first. If the country you selected has states available, you can narrow the city search to include all available states or one specific state.
`Metro Area`	The metro area or areas where you want to find accounts or contacts. Also known as metropolitan and micropolitan statistical areas, metro areas are available for the United States only. You can't use a metro area in a search with a city or a state. To jump to a metro area in the list, type the first few letters of the metro area you're looking for.
`Postal/ZIP Code`	The postal or ZIP code(s) where you want to find accounts or contacts.
`Area Code`	The area code(s) where you want to find accounts or contacts. To find area codes outside the United States and Canada, add the country calling code as a prefix. For example, the United Kingdom's country calling code is *`44`*, and London's area code is *`20`*, so to find accounts or contacts in London by area code, enter *`4420`* in the `Area Code` field.

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

Field	Definition
	Tip: When using country calling codes, you should also select a country. This will ensure you're getting only the results you want.

SEE ALSO:

Prospect for Companies Fast Right In Salesforce

Prospect for Contacts Fast Right In Salesforce

Record Icons in Data.com Search Results

When you search Data.com for accounts and contacts, you might see one or more icons next to the records in your search results.

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

Icon	Definition	Considerations
Already in Salesforce	The record is already in Salesforce. Hover over the icon, then click the link to go to the Salesforce record. Either of these conditions represents a record that's already in Salesforce. • The record was added to Salesforce from the Data.com tab. In the process, it was purchased from Data.com and affects the addition limit. • The record was manually created in Salesforce and later matched to a Data.com record. The record was not purchased from Data.com.	• If the record was already added, you can export it without it affecting your addition limit. • If a record was already added, you can't add it again unless your organization allows duplicates. Adding a duplicate record doesn't affect your addition limit. • If the record was added by another user and you don't have permission to view the record, you won't be able to link to it from the Data.com search results. If, however, your organization allows duplicates, you can add the record again so you'll have access to it. Adding the record again doesn't affect your addition limit.
Already Purchased	The record was already purchased from Data.com. Either of these conditions represents a record that has been purchased from Data.com. • The record was added to Salesforce from the Data.com tab. In the process, it was purchased from Data.com and affects the addition limit. • The record was exported from Data.com. In the process, it was	• If the record was already added, you can export it without it affecting your addition limit. • If the record was already exported, you can add it without it affecting your addition limit. • If a record was already added, you can't add it again unless your organization allows duplicates. Adding the record again doesn't affect your addition limit.

Icon	Definition	Considerations
	purchased from Data.com and affects the addition limit.	
Inactive	The Data.com record corresponding to the Salesforce record has been reported as inactive by either Data.com or a user in your organization. A contact record may be inactive if it contains out-of-date or inaccurate information. An account record is inactive if D&B has marked it as out of business. Inactive records are hidden by default, but you can use filters to show them.	

SEE ALSO:

Prospect for Companies Fast Right In Salesforce

Prospect for Leads Fast Right In Salesforce

Prospect for Key Contacts at Your Accounts

Prospect for Contacts Fast Right In Salesforce

Guidelines for Prospecting for Companies and Contacts to Use in Other Apps

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

Here are some things to consider when exporting records from Data.com.

- A green dot ( ) appears in search results next to records *already in Salesforce*. A blue checkmark ( ) appears in the search results next to records that were *already purchased by any Data.com user in your organization*. Both of these types of records are considered to be records your organization *already owns*.
- If the number of records you've selected to export *exceeds* your record addition balance, we'll let you know. Then, from the export confirmation message, you can opt to either *include already purchased records*) *along with new records* in your export; or *exclude all selected records that your organization already owns* (or), and export *only new records*. Just select the option you want on the export confirmation message.
- If you export Data.com contacts or accounts *instead of* adding them to Salesforce, each exported record counts against your record addition balance. If you export records you've already added to Salesforce or re-export records you previously exported, the exported records don't count against your record addition balance.
- If you export a group of Data.com contacts, you can still add those contacts back into Salesforce as contacts or leads without affecting your record addition balance.
- Regardless of your addition limit or the number of records you have left to add, you can't export more than 100,000 records at a time. Records will be exported in batches of 50,000. If two batches are needed, the records will be sent in a .zip file.
- If your organization respects Do-Not-Contact settings, contact records with `Do Not Call` or `Email Opt Out` selected have blank `Phone` or `Email` fields in .csv files.
- If numeric values, such as phone numbers, are cut off in the .csv file, change the format of the field's column in the .csv file to *`General`* or *`Text`*, or open the file in a text editor such as WordPad.

You can import a list of exported records back into Salesforce using Data Loader. Unless your Data.com preferences are set to allow duplicate records, the import process checks for duplicates using the Data.com ID number from the `Data.com Key` field.

These records won't be imported from Data Loader.

- Any record that has the same Data.com ID (from the `Data.com Key` field) as another record within the .csv file.
- Any record that has the same Data.com ID (from the `Data.com Key` field) as a record already in Salesforce.

SEE ALSO:

Prospect for Company Data to Use in Other Apps

Prospect for Contact and Lead Data to Use in Other Apps

Using Data.com FAQ

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

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 can I see complete, relevant information for Data.com search results?

Which Data.com user type am I?

How can I improve my Data.com search results?

Why do I see companies I didn't search for in my Data.com search results?

What's the limit of Data.com records I can add to Salesforce?

When I add CRM records from Data.com, how do I know which field values have Data.com data?

What does the Account Site field value on an Account record mean?

Why does the Ownership field have a value of Private for companies I know are public?

I'm seeing a discrepancy between the numbers in the Employees and Contacts fields on an Account record. Why?

I use Data.com and I'm seeing a blank or zero (0) value in the Employee and Revenue fields. Why?

Why do some leads have a blank or zero (0) value in the Annual Revenue and Number of Employees fields after I use the Data.com Clean auto-fill feature?

When I use the Employees or Revenue filter to refine my account or contact search results, I get far fewer results than I expect. Why?

Why do some account and D&B Company records have identical D-U-N-S Numbers?

What is the difference between the Account Site and Location Type fields?

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

Why did I receive a message that says, You can't clean this record because you have limited data access, as set by your administrator?

SEE ALSO:

Understand Data.com Searches

How can I see complete, relevant information for Data.com search results?

We've limited the number of details available for search results that exceed ten pages, to ensure data security.

To see complete, relevant account information in search results:

- Narrow your search using the search filters on the left of the page. Filtering out results that aren't the focus of your search gives fewer, more targeted results. For example, selecting Director-level accounts in a company's Sales department reduces the results from 50 pages to 4, listing only the accounts you're looking for.
- Sort your search results so that the target of your search appears in the first few pages. For example, sorting the Updated column lists the most recently updated accounts first.

Once you've identified the accounts you're looking for, purchase the accounts by adding or exporting them to Salesforce from Data.com. You see full details of the accounts and contacts you purchase and add to your organization.

Which Data.com user type am I?

It's easy to find out. From your personal settings, enter *Advanced User Details* in the Quick Find box, then select **Advanced User Details**. No results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**.The Data.com User Type field identifies you as either a Data.com User or a Data.com List User. If the field is blank, you do not have a Data.com user license.

For a quick definition of your Data.com user type, just click the info icon (i) next to the field.

SEE ALSO:

Using Data.com FAQ

How can I improve my Data.com search results?

It's easy. Just use search modifiers. To see examples, just click the info icon (i) above each Data.com search field. It's also helpful to save searches you use frequently.

SEE ALSO:

Understand Data.com Searches

Why do I see companies I didn't search for in my Data.com search results?

For account searches, the Data.com search results you get are based on the company name, the website of the parent company, and the websites of the parent company's subsidiaries and branch locations, if any, so your results may include companies that you didn't actually search for. For example, if you want to find Sun Microsystems and you enter either *Sun Microsystems* or *sun.com* in the Company or Website field, the results will also include Oracle Corporation because Oracle is the parent company of Sun Microsystems..

SEE ALSO:

Understand Data.com Searches

Using Data.com FAQ

What's the limit of Data.com records I can add to Salesforce?

From Setup, enter *Users* in the Quick Find box, then select **Prospector Users**. In the Data.com Users section, find your name and see what your monthly limit is and how many records you've already added or exported during the month. Your administrator sets the monthly allowance, which expires at the end of each month, regardless of whether you've met your limit.

If you're a Data.com List User, your name also appears in the Data.com List User section of the page. After you've used your monthly record additions, you'll share record additions from a pool with all other List Users in your organization. Your organization's pool has a limit, so if one Data.com List User reaches the limit, other Data.com List Users can't add records. List pools expire one year after purchase.

If adding a set of records causes you to exceed your addition limit, you'll see a message that tells you how many additions you have remaining. If you still need to add more records, contact your administrator.

SEE ALSO:

Using Data.com FAQ

When I add CRM records from Data.com, how do I know which field values have Data.com data?

Just check the help topics that define the fields on those records. All fields that are enabled for Data.com data are identified.

- Account Fields
- Contact Fields
- Lead Fields

SEE ALSO:

Using Data.com FAQ

What does the `Account Site` field value on an Account record mean?

`Headquarters/Parent` indicates that a company is a legal entity with other locations.

`Single location` indicates that a company is a headquarters with no other locations, and that it may or may not be a distinct legal entity.

`Branch` indicates that a company is not a distinct entity. Rather, a branch is a location of a headquarters or parent company.

SEE ALSO:

What is the difference between the Account Site and Location Type fields?

Using Data.com FAQ

Why does the `Ownership` field have a value of `Private` for companies I know are public?

Dun & Bradstreet (D&B), who provides this data, only tracks ownership information for headquarters or parent companies. If a publicly traded headquarters or parent company has any subsidiaries, such as branch locations, those subsidiaries show a value of `Private` unless they are traded independently. The value will also be `Private` if the ownership type is unknown.

SEE ALSO:

What does the Account Site field value on an Account record mean?

Using Data.com FAQ

I'm seeing a discrepancy between the numbers in the `Employees` and `Contacts` fields on an Account record. Why?

There are a number of possible reasons.

- The number of employees is only available on records that have a value of `Headquarters/Parent` in the `Account Site` field. This means that a branch location may show a value of zero in the `Employees` field but still have a number of contacts.

- The `Employees` field on Account records shows the total number of employees within a company, including all subsidiary and branch locations. The number of contacts, however, reflects only the contacts at that specific location. So a headquarters location that has 5,000 employees throughout its various locations may only have 3,000 contacts at the headquarters location.
- *Employee* totals come from Dun & Bradstreet (D&B) and usually *do not* include contract employees. *Contact* totals and related data come from the Data.com community and often *do* include contract employees as long as they have a valid company email address.

SEE ALSO:

Using Data.com FAQ

I use Data.com and I'm seeing a blank or zero (0) value in the Employee and Revenue fields. Why?

Dun & Bradstreet (D&B) collects revenue data for headquarters and single locations only, so records associated with branch locations won't have a value for the `Annual Revenue` field on account and leads records or the `Annual Sales Volume` field on D&B Company records.

Similarly, D&B doesn't always have confirmed employee counts for branches and single locations, so there might not be a value for the `Number of Employees` field on lead records, the `Employee` field on account records, or the `Number of Employee-Total` field on D&B Company records.

SEE ALSO:

Using Data.com FAQ

Why do some leads have a blank or zero (0) value in the `Annual Revenue` and `Number of Employees` fields after I use the Data.com Clean auto-fill feature?

Data.com Clean has improved its location-based matching and, as a result, contacts are now associated with their actual location, rather than the organization's headquarters location. Because Dun & Bradstreet (D&B) only collects revenue data for headquarters locations, leads associated with a branch location or single location won't have a value for the `Annual Revenue` field. Similarly, D&B doesn't always have confirmed employee counts for branch and single locations, so there might not be a value for the `Number of Employees` field on lead records.

If you want to map the revenue and employee data from the headquarters location to the branch or single location records, contact your Salesforce administrator.

SEE ALSO:

Using Data.com FAQ

When I use the Employees or Revenue filter to refine my account or contact search results, I get far fewer results than I expect. Why?

Dun & Bradstreet (D&B) doesn't collect revenue data for branch locations and doesn't always have confirmed employee counts for branches or single locations. Therefore, if you enter *1* as your minimum range in the Revenue filter, your search results will exclude all records that have a zero (0) Revenue value. Similarly, if you enter *0* as your minimum range in the Revenue filter, your search results will exclude all records that have a blank Revenue value. The Employee filter works the same way.

If you want all records with a zero (0) or blank Revenue or Employee value included in your filtered search results, be sure to leave the `Min` field blank.

SEE ALSO:

What does the Account Site field value on an Account record mean?

Using Data.com FAQ

Why do some account and D&B Company records have identical D-U-N-S Numbers?

If a company operates within a single country, its Global Ultimate (highest entity within an organization) and Domestic Ultimate (highest entity within an organization in a country) are the same entity, and therefore the values in their `D-U-N-S Number` fields are the same. For definitions of all the D&B fields, see D&B Company Fields.

SEE ALSO:

Using Data.com FAQ

What is the difference between the `Account Site` and `Location Type` fields?

`Account Site` is the field found on account records and the Data.com account card. `Location Type` is the field found on D&B Company records. (D&B Company records are available to organizations that have purchased Data.com Premium Prospector.) Both fields contain the same values: `Single location`, `Headquarters/Parent`, and `Branch`.

SEE ALSO:

Using Data.com FAQ

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.

SEE ALSO:

What Salesforce Fields Are Affected by Data.com Clean?

Using Data.com FAQ

Why did I receive a message that says, `You can't clean this record because you have limited data access, as set by your administrator`?

If you don't have appropriate access to the `D&B Company` object, you'll see this message when you use Data.com Clean to manually clean an account.

Ask your administrator to make sure you have read access to the `D&B Company` object.

Limitations with Prospecting for Companies, Contacts, and Leads in Salesforce

There are several important limitations to note for users who are searching and adding records from Data.com.

- The subindustries under Government in the Data.com Industry Categories classification system are currently unavailable due to mapping limitations between the Data.com Industry Categories and the SIC system.
- By default, each user assigned a Data.com Prospector user license has a monthly record addition limit of 300. This number can be adjusted based on your agreement. Record additions expire at midnight on the last day of each month, as determined by your organization's default time zone.
- A single Data.com Prospector license is assigned every time you enable a user for Data.com Prospector.
- If your organization purchased only Data.com Prospector, only users with licenses can clean records.
- When adding records from Data.com, annual revenue is only available in US dollars. If `U.S. Dollar` is not an active currency for your organization, records added from Data.com do not include annual revenue 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

SEE ALSO:

Guidelines for Prospecting for Companies, Contacts, and Leads in Salesforce

Get Critical Industry, Financial, and Competitive Insights for Your Accounts

Need detailed information about account businesses? Click the `Prospecting Insights` button on the account detail page to get data about your prospects' businesses and financials, as well as competitive and industry details—directly from Data.com in real time.

Prospecting Insights is available with Data.com Corporate Prospector and Data.com Premium Prospector licenses. Insights data is available for accounts that were imported from, or cleaned by, Data.com.

Before you begin, make sure that your administrator has added the `Prospecting Insights` button to the Account page layout.

1. Open the account detail page for a prospect.
2. Click **Prospecting Insights**.

   If you click **Prospecting Insights** for an account that hasn't been imported from or cleaned by Data.com, a message recommends that you first clean the account.

EDITIONS

Available in: Salesforce Classic

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited** Editions

USER PERMISSIONS

To get Data.com prospecting insights for an account:

- "Read" on accounts

SEE ALSO:

Prospecting Insights Data Details

Prospecting Insights Data Details

Data.com Prospecting Insights combines D&B company details and industry intelligence in a quick-view snapshot, to help you start smart conversations with your prospects and customers.

Prospecting Insights is available with Data.com Corporate Prospector and Data.com Premium Prospector licenses. Insights data is view-only, and is available for accounts that were imported from, or cleaned by, Data.com.

EDITIONS

Available in: Salesforce Classic

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited** Editions

Insights Category	Details
Business Details	• Description of the company supplied by the Hoover's, Inc. subsidiary of Dun and Bradstreet • Company address, phone, and website • Location type–headquarters or a branch office • Location size in square feet, identified as the actual measurement or estimated • Location ownership–owned or rented • Tradestyle, if the company uses one • Year the company was founded
Financial Details	• Fiscal year end, identified by month • Stock market exchange and symbol • Standard & Poor's 500 index indicator • Fortune 1000 rank • Delinquency risk–the likelihood of this company paying 90 or more days late over the next 12 months* Important: Use this information for marketing pre-screening purposes only. • Annual revenue for the most recent and prior year, and growth percentage • Net income for the most recent year* • Employee number for the most recent and prior year, and growth percentage
Contacts from Data.com	• Graphical view of contact distribution at the company • Links to contacts at the company, by department–clicking a link takes you to the Data.com Find Contacts page
Top Competitors	• Links to websites for the company's top competitors • Primary competitors listed by revenue
Industry Details	• Primary NAICS and SIC classifications • Industry selector for industries related to the primary NAICS and SIC classifications

Insights Category	Details
	• Sample call-prep questions • Competitive landscape analysis* –an overview of the industry's competitive environment • Industry trends* and industry opportunities* –how events and issues are affecting industry businesses • Links to selected industry websites

*Available only with a Premium license

Access Essential Insights from the Account Details Page

Click **See More Insights** on an account details page to access important info about the selected account. Quickly identify the account's business and financial details; understand the competitive landscape; see essential industry and financial details; and explore hierarchical company relationships for your account. With all the critical details at the right time, your sales pipeline is always full.

Prospecting insights give Data.com Prospector users tons of information about a selected account.

The DETAILS tab gives you detailed information for the selected account. You get your account's essential financial information so you can evaluate its financial health. View details about the account's related industry and competitors to identify the right sales strategy. Add contacts from a list filtered by level or department to start critical conversations with the right people.

EDITIONS

Available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited** Editions

Go to the COMPANY HIERARCHY tab and explore the company's parent-child relationships with other linked companies. Add an account to your organization directly from the company hierarchy view.

Data.com Clean

Data.com Clean provides a number of ways to keep your Salesforce CRM records up to date by leveraging company information from D&B and millions of crowd-sourced contacts. There are two versions of the Data.com Clean product: Corporate Clean and Premium Clean. They differ based on the D&B fields that are available when you clean account or lead records.

Clean compares your Salesforce account, contact, and lead records with records from Data.com and creates a link between your Salesforce record and its matching Data.com record. Clean also provides clean status information for Salesforce accounts, contacts, and leads on page 105.

EDITIONS

Available in: Salesforce Classic

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

Users with a Clean license can:

- Manually compare individual Salesforce records side by side with matched Data.com records, and update Salesforce records field by field.
- Select account, contact, and lead records from a list, and clean them all at once.
- Manually refresh D&B Company records linked to accounts (Premium Clean only).

Your organization can also:

- Configure and run automated Clean jobs to flag field value differences on Salesforce records, fill blank fields, overwrite field values.
- Use the Data.com Match API to create a custom solution for specific business purposes like cleaning leads as they are created and cleaning custom objects.

Data.com Clean does not support person accounts.

There are two versions of Data.com Clean: Corporate Clean and Premium Clean. They differ based on the D&B fields that are available when you clean account or lead records, either manually or via automated jobs.

Data.com Clean Version	D&B Fields
Data.com Corporate Clean	Basic set of D&B fields.
Data.com Premium Clean	Basic set of D&B fields, plus the `D&B Company` field. This field links to an associated D&B Company record with over 70 more D&B fields that are accessible on the D&B Companies tab. If the Salesforce records's `D&B Company` field is blank, a link is created, if available, when the record is cleaned.

Note:

- Prospector or Clean Corporate licenses can't be purchased for organizations that already have Prospector or Clean Premium licenses. If you want to purchase Corporate licenses, you'll need to convert your Premium licenses.
- Prospector or Clean Premium licenses can't be purchased for organizations that already have Prospector or Clean Corporate licenses. If you want to purchase Premium licenses, you'll need to convert your Corporate licenses.
- Data.com Clean must be purchased 1:1 for Sales Cloud and Service Cloud seats.

IN THIS SECTION:

Keep Your Salesforce Records Complete and Up-to-Date

Your business is only as good as its data. Spend less time updating data and more time growing your business, using Data.com Clean. Maximize valuable company information from D&B and millions of crowd-sourced contacts to keep your Salesforce data clean and up to date.

SEE ALSO:

Using Data.com FAQ

Clean Individual Salesforce Records

Clean a List of Salesforce Records

Keep Your Salesforce Records Complete and Up-to-Date

Your business is only as good as its data. Spend less time updating data and more time growing your business, using Data.com Clean. Maximize valuable company information from D&B and millions of crowd-sourced contacts to keep your Salesforce data clean and up to date.

EDITIONS

Available in: Salesforce Classic

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

IN THIS SECTION:

Clean Individual Salesforce Records

Use Data.com Clean to manually update your account, contact, and lead records. Manual clean lets users compare a single Salesforce record side by side with its matched Data.com record and update the Salesforce record field by field.

Clean a List of Salesforce Records

With Data.com Clean, you can select account, contact, and lead records from a list, and clean them all at one time. A Data.com Clean license is required to clean records from a list.

What Salesforce Fields Are Affected by Data.com Clean?

What Does the Clean Status Tell Me About a Record?

The `Clean Status` field on account, contact, and lead records indicates how the record's data compares with data from Data.com. If you click the icon next to the status, you'll get more status details, plus options for refreshing the status. Depending on the status, you can also clean some records right from the `Clean Status` field.

How Are Salesforce and Data.com Records Matched?

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.

Data.com Clean Statuses

If you use Data.com Prospector or Data.com Clean, your Salesforce account, contact, and lead records have a `Clean Status` field, which indicates the record's clean status as compared with Data.com.

Dun & Bradstreet® Match Grades

If your organization uses Dun & Bradstreet DUNSRight™ matching service to clean records, the match grade helps you decide which record is the right one when selecting a match.

Learn About Cleaning Records with Data.com Clean

When you clean a record, you're comparing your Salesforce data with information in Data.com. There are a few important concepts to understand about this process, including how to select matching records and how to mark Data.com records as incorrect.

Clean Individual Salesforce Records

Use Data.com Clean to manually update your account, contact, and lead records. Manual clean lets users compare a single Salesforce record side by side with its matched Data.com record and update the Salesforce record field by field.

Data.com Clean offers a number of ways to clean records. Users can clean individual records manually or clean groups of records from a list view. Your organization can also clean batches of records using automated Clean jobs. Manual clean works for *all* the account, contact, and lead records you have access to in Salesforce—not just those you previously added from Data.com. Manual clean is available to organizations that have purchased Data.com Clean, and to any Salesforce user with a Data.com Prospector license.

Note: If you clean your account records with Data.com Prospector or Data.com Clean, Data.com converts non-USD currencies to USD every month, which may cause the values in the `Annual Revenue` field to change. For organizations that use non-USD currencies, we ignore the `Annual Revenue` field when determining a record's clean status (so the `Clean Status` field's value does not change). We also remove the value from the `Annual Revenue` field on account records and the clean comparison page.

1. Open the record and check its `Clean Status` field. Even if its status is `In Sync`, you can manually clean the record. And if your organization uses D&B's DUNSRight matching service, you may be able to match your record to a different one from Data.com.

   Tip: From the `Clean Status` field, you can also get additional status information (such as which fields have different data in Data.com) and then clean the record. Just click the status icon ( ) and the popup will guide you.

2. Click **Clean** to open the comparison page and compare the Salesforce record with Data.com's.
3. Compare the two records side by side. You'll see a check mark next to any Data.com field value that matches the corresponding value in your Salesforce record.
4. Select the checkbox next to any Data.com value you want to accept.
5. If you use DUNSRight Matching and want to look for a different match from Data.com, click **Wrong Match?**
6. Click **Save** when you're satisfied that the record is accurate, even if you don't accept any data from Data.com. The `Clean Status` field reflects the record's current status and its time stamp is updated to reflect your activity.

   Note: If you click **Cancel**, your Salesforce record's data won't be updated, but if Data.com finds a better match for the record, the values in its `Clean Status` and `Data.com Key` fields may change. These two fields always reflect the best match from Data.com as of the most recent clean process, regardless of the method used to clean the record.

   If your organization uses Data.com Premium Clean or Data.com Premium Prospector and you've manually cleaned an account or lead record that doesn't yet have a D&B Company record linked to it, Salesforce will create a D&B Company record (if available) and link it to the account or lead record when you click **Save**. The next time you open the comparison page, the linked record will be identified by its D-U-N-S Number in the `D&B Company Record Linked` field.

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 clean account records:
- "Edit" on accounts

To clean contact records:
- "Edit" on contacts

To clean lead records:
- "Edit" on leads

SEE ALSO:

Compare Salesforce and Data.com Data at a Glance

Data.com Clean Statuses

What Salesforce Fields Are Affected by Data.com Clean?

Clean a List of Salesforce Records

USER PERMISSIONS	
To clean account records:	"Edit" on accounts
To clean contact records:	"Edit" on contacts
To clean lead records:	"Edit" on leads
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"

EDITIONS

Available in: Salesforce Classic

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

With Data.com Clean, you can select account, contact, and lead records from a list, and clean them all at one time. A Data.com Clean license is required to clean records from a list.

Data.com Clean offers a number of ways to clean records. Users can clean individual records manually or clean groups of records from a list view. Your organization can also clean batches of records using automated Clean jobs.

Cleaning from a list works for all the account, contact, and lead records you have access to in Salesforce—not just those you previously added from Data.com. When you click the Accounts, Contacts, or Leads tab, you can select a view to see a list of the records you're allowed to view. The results you see are called a *list view*. From the list view, simply select the records you want to clean and Data.com Clean does the rest.

Note: If you're cleaning records from a standard list view, make sure your system administrator has added the `Clean Status` field to the view. If you're cleaning records from a custom list view you've created, you'll need to add the `Clean Status` field yourself. If you use Data.com Social Key together with Social Accounts and Contacts, you or your administrator can also add the fields for the applicable social networks (LinkedIn, Twitter, or Facebook) to your contact list views.

1. Click the tab (Accounts, Contacts, or Leads) for the object whose records you want to clean from your list.
2. Select a view from the drop-down and click **Edit**.
3. From the list, select the records you want to clean, and click **Clean**.
4. Select one of these Clean options.
   - `Update Clean Status` will update each record's `Clean Status` field. If you use Social Key, social handles will be added to the record, if available.
   - `Update Clean Status and Fill Blank Fields` will update each record's `Clean Status` field and fill blank fields with Data.com data. If you use Social Key, social handles will be added to the record, if available.
5. Click **Update**.
   We'll provide a confirmation message telling you how may records were matched, updated, and whether any errors occurred. If your organization uses Social Key with contacts and leads, we'll also let you know if we were able to supply social handles.
6. Review the changes to your records.
   If you selected the option to update only the `Clean Status` field and now find records with a clean status of `Different`, you can manually clean each record from its detail page.

SEE ALSO:

Data.com Clean Statuses

What Salesforce Fields Are Affected by Data.com Clean?

What Salesforce Fields Are Affected by Data.com Clean?

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.

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

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	

SEE ALSO:

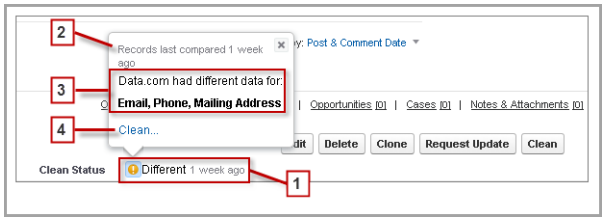
Why did I receive a message that says, You have limited access to data, so you can't completely clean this record?

Clean Individual Salesforce Records

What Does the `Clean Status` Tell Me About a Record?

The `Clean Status` field on account, contact, and lead records indicates how the record's data compares with data from Data.com. If you click the icon next to the status, you'll get more status details, plus options for refreshing the status. Depending on the status, you can also clean some records right from the `Clean Status` field.

Here's an example that shows some of your options.



1. This record's status is `Different` because when it was last compared, one week before, the records in Salesforce and Data.com had different values for some or all of their fields. The user who compared the records previously may have:
   - Decided not to accept any of the Data.com values.
   - Accepted some values from Data.com and kept some Salesforce values.
   - Clicked **Cancel** on the comparison page.

   Click the icon to view the popup, which provides additional information and Clean options.
2. This line tells you about the Salesforce record's most recent comparison activity.

   In this case, a user compared the Salesforce account record with Data.com's version one week ago.
3. This section provides more details about the comparison. In this case, Data.com had *different* `Email`, `Phone`, and `Mailing Address` values for the contact.

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

4. You can click the **Clean...** link to compare the Salesforce and Data.com records yourself.

   If you click **Cancel**, the record's clean status will remain `Different`. If you click **Save**, even if you haven't accepted any Data.com values, the record's clean status will be `Reviewed`.

How Are Salesforce and Data.com Records Matched?

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.

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

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`

Data.com Clean Statuses

If you use Data.com Prospector or Data.com Clean, your Salesforce account, contact, and lead records have a `Clean Status` field, which indicates the record's clean status as compared with 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

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

Clean Status	Definition	API Value	Notes
`Not Compared`	The current version of the Salesforce record has not been compared with Data.com. This status may occur because: • The record was *created manually* in Salesforce (not *added from Data.com*) and has not yet been compared with Data.com. • The Salesforce record was previously compared with Data.com but later edited by a user and not compared again. • The Salesforce record was previously compared with Data.com but later updated by a workflow or other automated process (such as lead conversion)	`Pending`	Records you add from Data.com are always `In Sync` until the data changes in one or both of the records. After you clean the record and a match is found in Data.com, the record's `Clean Status` changes to `Reviewed` until one of these conditions is met. • The two records are identical (`In Sync` status). • The record is updated in Salesforce or

Clean Status	Definition	API Value	Notes
	and not compared with Data.com again. • You map Data.com fields to Salesforce fields and one or more newly mapped Data.com fields has no value.		Data.com (`Different` status). • The record becomes inactive in Data.com (`Inactive` status).
`In Sync`	When your Salesforce record was last compared with the Data.com record, the two were identical. Records with `In Sync` status are considered to be clean.	`Matched`	Records in `In Sync` status are considered to be clean, but you can repeat the clean process. Click the icon in the `Clean Status` field and check the time stamp to see when the record was last compared.
`Reviewed`	When your Salesforce record was last compared with the Data.com record, the user who compared them: • Kept one or more values from the Salesforce record. • May have also flagged a field value as *`wrong`* to Data.com. • Marked a record as *`Inactive`*. or • Your Clean jobs are set to overwrite values for one or more fields, and one or more values were overwritten during the most recent job.	`Acknowledged`	Records in `Reviewed` status are considered to be clean, but you can repeat the clean process. After you clean the record and a match is found in Data.com, the record's `Clean Status` remains in `Reviewed` status until one of these conditions is met. • The two records are identical (`In Sync` status). • The record is updated in Salesforce or Data.com (`Different` status). • The record becomes inactive in Data.com (`Inactive` status). • Any fields previously flagged as *`wrong`* to Data.com have been reflagged as *`right`*.
`Different`	The Salesforce record has different data from the corresponding Data.com record. Note: It's important to remember that a record's clean status can change from `In Sync` or `Reviewed` to `Different` when values change in the matched Data.com record. This may happen regularly as updated information	`Different`	After you clean the record and a match is found in Data.com, the record's `Clean Status` remains in `Different` status until one of these conditions is met. • The two records are identical (`In Sync` status).

Clean Status	Definition	API Value	Notes
	from Data.com and D&B is made available.		• A user reviews the two records and keeps one or more values from the Salesforce record (`Reviewed` status). • The record becomes inactive in Data.com (`Inactive` status).
`Select Match`	Data.com does not have a record qualified for an *automatic* match but does have one or more potential matches. You can select one from up to five (5) match candidates.	`SelectMatch`	This status is available with the Data.com Clean product and D&B DUNSRight matching service only.
`Not Found`	The Salesforce record has no similar records in Data.com record.	`NotFound`	The record can't be cleaned in Salesforce because Data.com could not find a record to match it with.
`Inactive`	The Data.com record corresponding to the Salesforce record has been reported as inactive by either Data.com or a user in your organization. A contact record may be inactive if it contains out-of-date or inaccurate information. An account record is inactive if D&B has marked it as out of business.	`Inactive`	`Inactive` records are hidden from Data.com Prospector search results by default, but you can use filters to show them. If clean the record and report it as Active to Data.com, the record's clean status changes to *`Reviewed`*.
`Skipped`	Either: • The Salesforce record encountered an error related to a validation rule or trigger when it was last saved, causing the next incremental sync Clean job to set the record's status to `Skipped`. or • The record's clean status was set to `Skipped` via the API. *Incremental sync* Clean jobs *do not* process records with `Skipped` clean status. *Full sync* Clean jobs process records with *any* clean status that encountered errors related to validation rules, triggers, or other customizations when last saved, but those	`Skipped`	Work with your administrator to either: • Modify the trigger, validation rule, or API customization that caused the error and the `Skipped` status, and then clean the record again manually or with Clean jobs. or • Ask your administrator to consider selecting the `Skipped Records` Clean Job Bypass preference, which causes *both incremental and full sync jobs* to skip processing

Clean Status	Definition	API Value	Notes
	records' `Clean Status` field values do not change until the errors are resolved.		for records in `Skipped` clean status.

SEE ALSO:

- Clean Individual Salesforce Records
- Clean a List of Salesforce Records
- What Does the Clean Status Tell Me About a Record?
- Report an Account, Contact, or Lead as Inactive or Active to Data.com

Dun & Bradstreet® Match Grades

If your organization uses Dun & Bradstreet DUNSRight™ matching service to clean records, the match grade helps you decide which record is the right one when selecting a match.

Hover over any candidate's gray match grade bar to view the record's D&B DUNSRight match information, including its confidence code and match grade details (if available). The blue match grade legend shows Dun & Bradstreet code letters that correspond to these fields in your account record, in this order left to right. `Account Name or Tradestyle` | `Street Number` | `Street Name` | `City` | `State / Province` | `Mailing address / PO Box` | `Phone`

Letter	Definition
`A`	Values either match exactly or are similar enough that they should be considered to match.
`B`	Values are similar. In some cases, when Data.com and Dun & Bradstreet data are updated at different times, if a field on the D&B Company record is blank, the match grade letter will indicate that the field values are similar (B) instead of blank (Z).
`F`	Values do not match.
`Z`	Value is blank in one or both of the records. When the `State` value is blank within a D&B Company record, the `Street` field value is normalized to be blank. In these cases, both fields are colored gray in the match grade legend and the match grade for each is `Z`.

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

Learn About Cleaning Records with Data.com Clean

When you clean a record, you're comparing your Salesforce data with information in Data.com. There are a few important concepts to understand about this process, including how to select matching records and how to mark Data.com records as incorrect.

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:

Flag an Account, Contact, or Lead Field Value as Wrong or Right to Data.com

When you use Data.com Clean to clean a Salesforce record, if you know that one of its fields has an incorrect, or "*`wrong`*" value, you can report that information to Data.com. If a field value has been reported as wrong, we'll let you know. If you believe the field value is correct, or "*`right`*," you can tell us that, too.

Report an Account, Contact, or Lead as Inactive or Active to Data.com

When you use Data.com Clean to clean a Salesforce record, if you know the related account, contact, or lead is either out of business or not active at a company, you can report that information to Data.com. If an account, contact, or lead has been reported as `Inactive` to Data.com, we'll let you know. If you believe the account, contact, or lead is `Active`, you can tell us that, too.

Select a Matching Data.com Record for a Salesforce Account

If your organization uses Dun & Bradstreet's DUNSRight™ matching service to match and clean your account records, we automatically match records according to a preset Dun & Bradstreet confidence code, which your administrator selects. If we don't have a record qualified for an *automatic* match, but we have identified one or more *potential* matches, we'll set your record's clean status to `Select Match`. This clean status lets you know you need to *manually* review match candidates and select one. After you select a match, you manually clean your Salesforce record in the usual way.

Select a Different Data.com Match for a Salesforce Account Record

If your organization uses Dun & Bradstreet's DUNSRight Matching service, and you believe an account record has been matched incorrectly to a Data.com record, you may be able to match to a different Data.com record. After you select a new match, you manually clean your record in the usual way.

Compare Salesforce and Data.com Data at a Glance

When you manually clean a Salesforce account, contact, or lead record, you compare the data in your Salesforce record with data from Data.com. When you click the **Clean** button or `Clean Status` field value from a record , the comparison page appears. There you'll see the Salesforce record's fields and values side by side with the Data.com record's fields and values.

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.

Flag an Account, Contact, or Lead Field Value as Wrong or Right to Data.com

When you use Data.com Clean to clean a Salesforce record, if you know that one of its fields has an incorrect, or "*wrong*" value, you can report that information to Data.com. If a field value has been reported as wrong, we'll let you know. If you believe the field value is correct, or "*right*," you can tell us that, too.

When you clean an account, contact, or lead record, if you know that a particular field value is incorrect, you can flag that value as *wrong* to Data.com. If the value has been flagged as *wrong*, but you know the value is correct, you can flag it as *right*. On the comparison page, most fields offer the flagging option.

Note:

- If your account, contact, or lead record's `Clean Status` value is `In Sync`, and you flag a field value as *wrong* on the comparison page, the record's `Clean Status` value changes to `Reviewed`.

1. From the record, click **Clean** to open the comparison page.
2. If you want to flag a field value as *wrong*, click the down arrow next to the field and select **Flag as wrong to Data.com**.
   A red flag ( ) appears next to the field.
3. Click **Save**.
4. If a field value has been flagged as *wrong*, but you know it's right, click the down arrow next to the field and select **Flag as right to Data.com**.
   The red flag disappears.
5. Click **Save**.

When an `email` field value is flagged as wrong, that information is immediately submitted to Data.com's automated fact processing system. If enough Data.com users flag the same email, the record may ultimately be marked as `Inactive` by Data.com. When other fields are flagged as wrong, the information is reviewed by data stewards at Data.com or D&B.

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 clean account records:
- "Edit" on accounts

To clean contact records:
- "Edit" on contacts

To clean lead records:
- "Edit" on leads

Report an Account, Contact, or Lead as Inactive or Active to Data.com

When you use Data.com Clean to clean a Salesforce record, if you know the related account, contact, or lead is either out of business or not active at a company, you can report that information to Data.com. If an account, contact, or lead has been reported as `Inactive` to Data.com, we'll let you know. If you believe the account, contact, or lead is `Active`, you can tell us that, too.

An account, contact, or lead may be designated as *`Active`* or *`Inactive`* by either Data.com or a Data.com Clean user. For accounts, *`Inactive`* means out of business, and for contacts or leads, it means the associated person no longer works at the company.

If a record is `Inactive`, we'll let you know the source of that status, and if the source is Data.com, we'll tell you why. For example, we'll tell you if an account is out of business, a contact is no longer employed at the company, or a contact or lead's phone or email is invalid.

1. From the account, contact, or lead record, click **Clean** to open the comparison page.
2. If the account, contact, or lead is inactive, click **Report as Inactive**.
3. Click **Save**.
   The record's `Clean Status` field now shows that it's *`Inactive`*.
4. If an account has been reported as inactive, but the company remains in business, or a contact or lead has been reported as inactive, but the person still works at the company, you can clean its record again. On the comparison page, you'll see a message telling you the record's current reported status—`out of business` for accounts or `Inactive` for contacts and leads—and who reported it: Data.com or a user.
5. Click **Report as Active**.
   The record's `Clean Status` field reverts to the value it had before the record was reported as *`Inactive`*. For example, if a contact's `Clean Status` is *`Reviewed`*, and then the contact is reported as *`Inactive`*, its clean status will change to `Inactive`. If the contact is later reported as *`Active`*, its clean status reverts to *`Reviewed`*.

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 clean account records:
- "Edit" on accounts

To clean contact records:
- "Edit" on contacts

To clean lead records:
- "Edit" on leads

SEE ALSO:

Data.com Clean Statuses

Select a Matching Data.com Record for a Salesforce Account

If your organization uses Dun & Bradstreet's DUNSRight™ matching service to match and clean your account records, we automatically match records according to a preset Dun & Bradstreet confidence code, which your administrator selects. If we don't have a record qualified for an *automatic* match, but we have identified one or more *potential* matches, we'll set your record's clean status to `Select Match`. This clean status lets you know you need to *manually* review match candidates and select one. After you select a match, you manually clean your Salesforce record in the usual way.

Select a Data.com Match for your Salesforce Account Record

1. If you need to select an initial match, from the record, click the `Select Match` clean status value, then click **Select Account from Data.com**.
   On the select match page, you'll see up to five match candidates, with the most similar record at the top.
2. Review the candidates. Hover over any candidate's gray match grade bar to view the record's Dun & Bradstreet DUNSRight match information, including its confidence code and match grade details (if available). The blue match grade legend shows Dun & Bradstreet code letters that correspond to these fields in your account record, in this order left to right.
   `Account Name` or `Tradestyle` | `Street Number` | `Street Name` | `City` | `State / Province` | `Mailing Address / PO Box` | `Phone`
3. Click any code letter to see the field name and an explanation.

Letter	Definition
A	Values either match exactly or are similar enough that they should be considered to match.
B	Values are similar. In some cases, when Data.com and Dun & Bradstreet data are updated at different times, if a field on the D&B Company record is blank, the match grade letter will indicate that the field values are similar (B) instead of blank (Z).
F	Values do not match.
Z	Value is blank in one or both of the records. When the `State` value is blank within a D&B Company record, the `Street` field value is normalized to be blank. In these cases, both fields are colored gray in the match grade legend and the match grade for each is `Z`.

4. Highlight the match you want, then click **Select and Proceed to Clean**. If you don't find a match you want, click **Cancel**; your record's status will remain `Select Match`.
5. Clean the record.
   The record's `Clean Status` field is 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 clean account records:
- "Edit" on accounts

To clean contact records:
- "Edit" on contacts

To clean lead records:
- "Edit" on leads

Example: For example: your organization's Dun & Bradstreet Confidence Code setting is *9*. You open your United Technologies account record to find that its `Clean Status` field value is `Select Match`. You click the status value to open the select match page. There you see four match candidates from Data.com. You hover over the match grade bar for the top candidate: United Technologies Corporation. In the popup, you see that the United Technology record's confidence code is `8`. The match grade legend shows these letters: **B A A B A A Z**. You know that `A` means the values should be considered to match, so you check out the values that do not.

You click the first **B** and see that the `Account Name` field values are similar, but not a clear-cut match: your record's `Account Name` value does not include `Corporation` while the Data.com record's `Account Name` value does. You click the second **B** and find that your record's `City` value is `Francisco` while the Data.com record's `City` value is `San Francisco`. So... similar, but not an exact match. You click **Z** and see that your record's `Phone` value is blank. The Data.com record's `Phone` value is `+1.415.901.7000`.

The Data.com United Technologies Corporation record looks like the one that matches your United Technologies record, so you select it, then click **Select and Proceed to Clean**. On the comparison page, you click **Select All** to accept all of the Data.com record's values, including the `Account Name`, `City`, and `Phone` values that were different or blank in your record. You click **Save** and your record's clean status changes to `In Sync`. Awesome.

SEE ALSO:

Select a Different Data.com Match for a Salesforce Account Record

Clean Individual Salesforce Records

Select a Different Data.com Match for a Salesforce Account Record

If your organization uses Dun & Bradstreet's DUNSRight Matching service, and you believe an account record has been matched incorrectly to a Data.com record, you may be able to match to a different Data.com record. After you select a new match, you manually clean your record in the usual way.

Select a Data.com Match for your Salesforce Account Record

1. Open the record and click **Clean**
2. On the comparison page, click **Wrong match?**
3. Select a different Data.com record, if one or more are available.
4. Click **Select and Proceed to Clean**

SEE ALSO:

Select a Matching Data.com Record for a Salesforce Account

Clean Individual Salesforce 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

USER PERMISSIONS

To clean account records:

- "Edit" on accounts

Compare Salesforce and Data.com Data at a Glance

When you manually clean a Salesforce account, contact, or lead record, you compare the data in your Salesforce record with data from Data.com. When you click the **Clean** button or `Clean Status` field value from a record , the comparison page appears. There you'll see the Salesforce record's fields and values side by side with the Data.com record's fields and values.

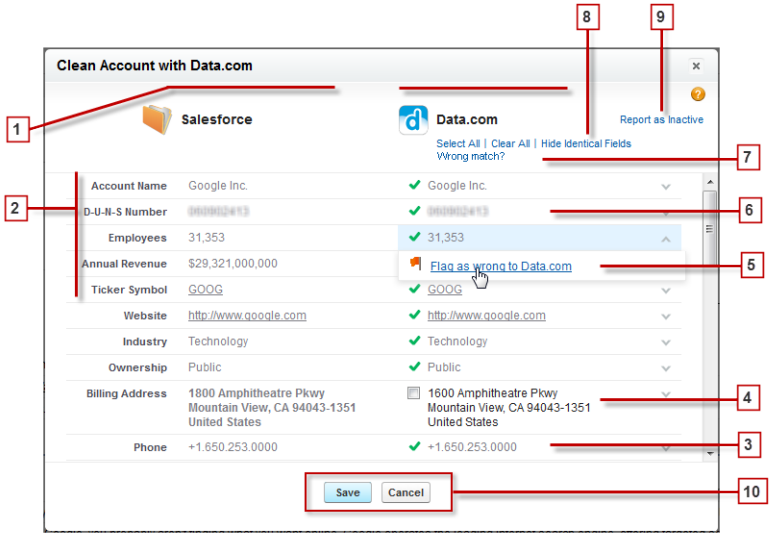
Cleaning records is easier if you understand how to read and use the comparison page. Here's what you'll find there.

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



1. The columns present Salesforce and Data.com records side by side, so you can easily compare the data from each source.
2. Field names appear on the left. I
3. If your Salesforce data matches Data.com's you'll see a green check mark (✔) for that field in the Data.com column.
4. If Data.com has data for a field that's blank or different in Salesforce, you'll see a checkbox. Select it to accept Data.com's data.
5. When you clean an account, contact, or lead record, if you know that a particular field value is incorrect, you can flag that value as *`wrong`* to Data.com. If the value has been flagged as wrong, but you know the value is correct, you can flag it as *`right`*. On the comparison page, most fields offer the flagging option.
6. If you use Data.com Premium Prospector or Data.com Premium Clean, when you clean an account or lead record, we create a D&B Company record (if one is available from Data.com and doesn't yet exist in Salesforce) and link it to the account or lead. The D&B Company record is identified on the comparison page.
7. If your Salesforce record is currently matched to a Data.com record and you think the match is wrong, click **Wrong Match?** and select a different Data.com record. This feature is available for D&B DUNSRight matching only.
8. By default, fields that have identical data are hidden. Click `Show Identical Fields` to see them all, along with the fields that have different data (as in this example). If there are a lot of fields, a scroll bar may appear. To hide identical fields, click `Hide Identical Fields`.
9. When you clean a Salesforce record, if you know the related account, contact, or lead is either out of business or not active at a company, click **Report as Inactive** to report that information to Data.com. If you believe the account, contact, or lead is active, you can tell us that, too.

10. Click **Save** when you're satisfied that you have the data you want, even if you don't make any changes. The Salesforce record's clean status will be updated as appropriate. If you click **Cancel**, your Salesforce record's data won't be updated, but if Data.com finds a better match for the record, the values in its `Clean Status` and `Data.com Key` fields may change. These two fields always reflect the best match from Data.com as of the most recent clean process, whether the record was cleaned manually (by you) or automatically (via Clean jobs).

SEE ALSO:

Clean Individual Salesforce Records

Data.com Clean Statuses

Select a Matching Data.com Record for a Salesforce Account

Select a Different Data.com Match for a Salesforce Account Record

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:

How Are Salesforce and Data.com Records Matched?

Data.com Social Key

Data.com Social Key works with Social Accounts and Contacts and Data.com Clean to make it easier to learn more about your contacts and leads in Salesforce or on social network sites. Your organization must have Data.com Clean enabled to use Social Key.

EDITIONS

Available in: Salesforce Classic

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

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.

When Clean jobs are run or records are cleaned from a list, Social Key finds and associates social handles for your contacts and leads. Social Key currently provides social handles for LinkedIn®, Twitter®, and Facebook® for contacts and leads in the United States only. Your administrator selects the social networks you want.

Users log in to a social network from a contact or lead's detail page and view the associated profile from within the Social Accounts and Contacts viewer or on the social network site. There's no manual search required.

Note: Depending on contacts' and leads' privacy settings, as well as the permissions set by their friends or connections and the site's terms of use, users might not see as much information as they would if logged in to their social network accounts directly.

Data.com Clean must be enabled to use Social Key.

Stay Up to Date with Social Networks and News

Account Insights

Give your users instant access to relevant, timely news about customers, partners, and competitors with Account Insights.

EDITIONS

Account Insights is available in: Lightning Experience and Salesforce1

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

Account Insights provides up to 20 relevant, timely news items (including articles and Twitter posts, which are collectively known as insights) that are selected to help you stay up-to-date with your accounts, industries you work with, and more. Salesforce pre-processes all insights to ensure relevance and to filter out spam and inappropriate content. It's not possible to add or change news sources.

Account Insights is available in English only, and only in the Salesforce1 mobile app and Salesforce Lightning Experience.

Accounts Insights provides different insights depending on where you access it.

- On account record detail pages, insights are selected based on the account, its executives, and its industry.
- In Salesforce Today, insights are selected based on recently viewed accounts and opportunities, and on tasks and events for those accounts. In Salesforce1, insights might also be related to the accounts that are associated with attendees on your upcoming mobile calendar events.

Insights are divided into four categories.

Account News
Insights related to an account, based on the Account Name entered in Salesforce.

Industry News
Insights based on the selected value in the Industry field for each account.

Executive News
Insights about individuals who hold executive roles at an account. You don't have to list executives as contacts on the account to get executive news.

Trending at My Company
Insights that other users in your Salesforce org are reading.

Account Insights is curated using technology provided by Data.com and third parties. You don't have to be a Data.com customer to use Account Insights.

Note:

- 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.
- For most accounts, Salesforce provides insights from our own news processing platform, which collects news from Yahoo, RSS feeds, and Twitter content of news providers. On occasion, if a match isn't found in our database, we may search Yahoo for news specific to your account, using the account name you've listed in Salesforce. Queries performed by Salesforce are performed using secure protocols and are not linked to individual Salesforce users.

Social Accounts, Contacts, and Leads

Increase your users' access to social intelligence and serve current and potential customers better with easy access to social networking within Salesforce

Watch a demo (3:29 minutes)

Once an account, contact, or lead is linked to a social network profile, you and everyone else in your organization can access current social data without having to log in to other sites.

Organizations using Data.com Clean also get Data.com Social Key, which makes finding social information for contacts and leads even easier. When Data.com Clean jobs are run or you clean records from a list, your contact and lead records are updated with social handles from Twitter, and Facebook, when available.

Social Network	What You See in Salesforce	Supported Objects in Salesforce Classic	Supported Objects in Lightning Experience Salesforce1	Objects Updatable with Data.com Social Key
Twitter	Twitter is a great way to see the public personas of your existing and potential customers and learn what's on their minds. You can see bios, recent tweets, and the people who are following and being followed by your accounts, contacts, and leads.	Accounts Contacts Leads	Accounts Contacts Leads	Contacts Leads
Facebook	Facebook gives you a more personal view of your existing and potential customers and helps you find common interests. For contacts, leads, and person accounts, you can see profiles, status	Accounts Contacts Leads		Contacts Leads

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

	updates, and the number of mutual friends you share. For business accounts, you can view your customers' corporate social media presence, including their company profile and wall posts.	
Klout	Klout is a third-party service that analyzes people's influence across social networks, including Twitter, Facebook, and LinkedIn. Use Klout to see the influence of your accounts, contacts, and leads on social media, who they influence, who influences them, and the topics they talk about.	Accounts Contacts Leads
YouTube videos	YouTube helps you find and view videos related to your accounts, contacts, and leads.	Accounts Contacts Leads

After you or another user in your organization associate a social network profile with an account, a contact, or a lead, Salesforce always displays current information about it. Which details each Salesforce user can see depend on how they're connected with the account, contact, or lead on the social network, as well as the privacy settings for the profile. If you aren't signed in to the social network through Salesforce, you see only information the social network user has made publically available.

Important: The Social Accounts, Contacts, and Leads feature uses Facebook, Klout, Twitter, and YouTube public APIs to display social information in Salesforce. Because these social networks have the option of modifying or terminating access to their APIs at any time, salesforce.com can't guarantee the future availability of this feature or any of its functionality, including access to the data that is currently provided or to any particular social network as a whole. As of the Winter '16 release, LinkedIn is no longer available through this feature.

Get Started in Salesforce1 or the Full Salesforce Site

To get started, simply go to any account, contact, or lead detail page and sign in to your social network accounts. Signing in creates private connections between Salesforce and your social network accounts, allowing you to see external social profiles in Salesforce.

SEE ALSO:

Configure Social Accounts, Contacts, and Leads

Security and Privacy When Using Social Accounts, Contacts, and Leads

The Social Accounts, Contacts, and Leads feature is built to provide security and privacy for you and your data.

- Salesforce uses the trusted OAuth protocol when you sign in to your Facebook, Twitter, or Klout accounts. Your login credentials aren't exposed to Salesforce, and we never store your passwords.
- Salesforce doesn't import or store social information. Each time you select a social profile or a YouTube video, Salesforce retrieves the information that you want to see directly from the social network. You'll always see current social information for your accounts, contacts, and leads.
- Associating a Salesforce record with a social network account doesn't cause any activity on the social network. For example, when you associate a contact with a Twitter account, you don't become a Follower of that account on Twitter.
- Salesforce never posts anything about your or your activities to your social network accounts.
- Your accounts, contacts, and leads aren't notified when you use Salesforce to view their social network profiles. And your interaction with social networks through Salesforce is read-only as long as you're using the Social Viewer.

  Note: If you leave the Social Viewer, for example by clicking a link that opens a new Web browser tab, you're leaving Salesforce and interacting directly with the social network. Actions you perform outside of the Salesforce Social Accounts, Contacts, and Leads viewer may be recorded on the social network.

- Your view of a Facebook or Twitter profile is unique to you and depends on how you're connected with each account, contact, or lead on each social network, as well as on the privacy settings currently in use by the account, contact, or lead. Other Salesforce users must sign in to their own social network accounts, and they'll only see what's permitted to them based on their own connection level. For example, if your Twitter profile is connected to your lead's Twitter profile, you could see that lead's other connections, but another user at your organization whose Twitter profile isn't directly connected with the lead won't.

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

SEE ALSO:

Social Accounts, Contacts, and Leads

Configure Social Accounts, Contacts, and Leads

Configure Social Accounts, Contacts, and Leads

You can disable the Social Accounts, Contacts, and Leads feature or turn some social networks on or off.

If you disable the Social Accounts, Contacts, and Leads feature for your login, you won't see any social networks for your accounts, contacts, or leads. Or, if you turn off access to an individual social network, you won't be able to view or access data for that social network.

Note: In Salesforce Lightning Experience and the Salesforce1 mobile app, users can access Twitter only, even if other networks are enabled.

1. From your personal settings, enter `Social` in the `Quick Find` box, then select **My Social Accounts and Contacts Settings**, **My Social Accounts and Contacts**, or **Settings**—whichever one appears.
2. Set up Social Accounts and Contacts so that it works the way you want it to.
3. Click **Save**.

SEE ALSO:

Troubleshoot Social Accounts, Contacts, and Leads

Social Accounts, Contacts, and Leads

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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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

View and Link Social Network Profiles

USER PERMISSIONS

To associate social network profiles to business accounts:	"Edit" on accounts
To associate social network profiles to person accounts:	"Edit" on accounts and contacts
To associate social network profiles to contacts:	"Edit" on contacts
To associate social network profiles to leads:	"Edit" on leads
To view social network profiles associated with business accounts:	"Read" on accounts
To view social network profiles associated with person accounts:	"Read" on accounts **AND** "Read" on contracts
To view social network profiles associated with contacts:	"Read" on contacts
To view social network profiles associated with leads:	"Read" on leads

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

View current information about your accounts, contacts, and leads gathered from their social network profiles and activity by associating each record to a social network profiles on Twitter and FaceBook.

Once you've linked an account, contact, or lead with a social network profile, you can view profile details and the profile's latest activity on the social network from the account's, contact's, or lead's detail page. If your organization uses Data.com Social Key, we provide the links automatically (if available) for Twitter, and Facebook.

Note: What information and activities you can see for each social network profile varies depending on that profile's privacy settings, the permissions set by their friends or connections, and the social network's terms of use. For more information about security and privacy, see Security and Privacy When Using Social Accounts, Contacts, and Leads.

You can link accounts, contacts, and leads with Twitter or Facebook profiles in Salesforce Classic. In Lightning Experience or Salesforce1can view and link Twitter profiles only.

1. From an account, contact, or lead detail page, sign in to the social network
2. If a social network profile isn't linked with the record yet, Salesforce automatically searches for profiles that match the record's name. Select a profile to link it with the record, or search again using different search parameters if none of the profiles are a good match.
3. View the social information that the social network is sharing with you.
4. In Salesforce Classic you can also:
   a. Click **Show Photo in Salesforce** to display the social network's profile image as the record profile image in Salesforce.
   b. Click **View Full Profile** to see the complete social network profile directly in the social network.
   c. Click **Find Different Profile** to change the social network profile that is linked to the account record.

d. Click **Sign Out** to close the private connection between Salesforce and your social network account. Once you've signed out, you won't be able to see social networking information for any record on that social network until you sign in to it again.

SEE ALSO:

Troubleshoot Social Accounts, Contacts, and Leads

Select and Change Profile Images for Accounts, Contacts, and Leads

When you or another user have associated records for accounts, contacts, and leads to social networks profiles, the records display images from Twitter or Facebook profiles. For some networks, profile images appear in Salesforce even when you aren't logged in to the network.

By default, the profile image for an account, a contact, or a lead is the profile image from the first social network linked to the record.

Note: Profile images from Facebook are visible in Salesforce Classic only.

1. On an account, contact, or lead detail page, click any social network icon ( ).
2. In the Social Viewer, select the tab for the social network that has the image you want to use.
3. Click **Show Photo in Salesforce**.

SEE ALSO:

Social Accounts, Contacts, and Leads

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 find and link social network profiles to business account records:
- "Edit" on accounts

To find and link social network profiles to person account records:
- "Edit" on accounts

  AND

  "Edit" on contacts

To find and link social network profiles to contacts:
- "Edit" on contacts

To find and link social network profiles to leads:
- "Edit" on leads

Troubleshoot Social Accounts, Contacts, and Leads

Increase your users' access to social intelligence and serve current and potential customers better with easy access to social networking within Salesforce

Note: Different social networks are available in different Salesforce products. Review the social network availability information on page 118 to ensure the network you're trying to access is available in the product you're using.

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

Salesforce Classic

1. Click the social network icons in the header on account, contact, and lead detail pages to display the Social Viewer.
2. If no icons are visible, the Social Accounts, Contacts, and Leads feature may be disabled for your organization. Ask an administrator to enable the feature.
3. If a social network icon is missing, that social network may be turned off.
   - Ask an administrator to turn on the social network for your organization.
   - Review your personal settings and turn on the network for your login.

Salesforce Lightning Experience

1. Open any account, contact, or lead record detail page.
2. If the Twitter card doesn't appear, the Social Account, Contacts, and Leads feature may be disabled for your organization. Ask an administrator to enable the feature and turn on Twitter access for your organization.
3. If the feature is enabled but the Twitter card doesn't appear, review your personal settings.

Salesforce1

1. Open any account, contact, or lead record detail page.
2. If the Twitter card doesn't appear, try the following.
   - Ask an administrator to enable the Social Accounts, Contacts, and Leads feature.
   - Ask an administrator to turn on Twitter access for the organization.
   - Ask an administrator to add the Twitter card to the mobile page layout for accounts, contacts, and leads.
   - Review your personal settings to make sure Twitter is turned on for your login.

SEE ALSO:

Configure Social Accounts, Contacts, and Leads

Social Accounts, Contacts, and Leads

Cultivating High Net Worth Customers for Financial Services

Salesforce for Wealth Management Overview

What Is Salesforce for Wealth Management?

Salesforce for Wealth Management is an industry solution that is designed and customized for the wealth management industry.

Who Should Use Salesforce for Wealth Management?

Salesforce for Wealth Management is intended for wealth management professionals who advise high net worth clients. It allows you to build deeper customer relationships, integrate key systems to drive user adoption, and effectively support compliance processes.

How Do I Obtain Salesforce for Wealth Management?

Salesforce for Wealth Management is available for free on AppExchange for Enterprise, Unlimited, and Performance Editions. It includes all generally available Enterprise, Unlimited, and Performance Edition features such as Outlook integration, workflow, and the Force.com API. As a prerequisite, it requires person accounts, which are enhanced account records designed for business-to-consumer industries such as financial services.

What Does Salesforce for Wealth Management Include?

Salesforce for Wealth Management contains the following components that set it apart from standard Salesforce functionality:

- Easy-to-use tabs with client-oriented fields
- Comprehensive client information including financial accounts, investment preferences, addresses, and personal interests
- Comprehensive "Know Your Client" suitability forms with an automated approval process
- Reports and dashboards specific to the wealth management process
- Relationship groups (also known as households)

SEE ALSO:

Get Started With Salesforce for Wealth Management
Navigating the Salesforce for Wealth Management App

Get Started With Salesforce for Wealth Management

As an administrator, perform the following tasks to set up Salesforce for Wealth Management for your organization:

USER PERMISSIONS

To view the setup options for custom apps:
- "View Setup and Configuration"

To manage custom apps:
- "Customize Application"

Verify the Contents of the Salesforce for Wealth Management App

Verify that the Salesforce for Wealth Management custom app contains the correct tabs:

1. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps**.
2. In the list, click `Salesforce for Wealth Management`.
3. Verify that the following tabs are present in the Included Tabs list:
   - Home

- Accounts
- Financial Accounts
- Holdings
- WM Assets
- Client Interests
- Know Your Clients
- Reports
- Dashboards
- Documents
- Console

4. If necessary, click **Edit** and choose the appropriate tabs to add or remove.

Configure Users' App Choices

In addition to the main Salesforce for Wealth Management custom app, the following custom apps are also available in the Force.com app menu:

- Salesforce Financial Accounts & Holdings
- Salesforce Clients and Interests
- Salesforce Know Your Client

Optionally, you can hide these apps from users in the Force.com app menu, because all appropriate tabs are already consolidated in the main Salesforce for Wealth Management custom app. To hide these apps:

1. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps**.
2. Click **Edit** next to the appropriate app name.
3. In the `Assign to Profiles` area, deselect the checkboxes in the `Visible` column that correspond to end users' profiles. Select only the checkboxes that correspond to administrator profiles.
4. Click **Save**.
5. Repeat this procedure as necessary for the remaining custom apps listed above.

Verify Record Types

From the object management settings for person accounts, go to Record Types to verify that the following record types are available for person accounts (clients).

Individual
This record type is for clients and prospective clients. It should be assigned to the `Individual` page layout.

Professional Relationship
This record type is for lawyers, accountants, and other professional relationships. It should be assigned to the `Professional Relationship` page layout.

Configure Users' Page Layouts

Ensure that the following components are included in users' page layouts, which can be configured from the management settings for each object by going to Page Layouts.

Home Tab Page Layouts

The home page layout for financial advisors, titled FA Home Page, should include the following components:

- Items To Approve
- Tasks
- Calendar
- Dashboard Snapshot
- Search
- Create New
- Recent Items
- Messages & Alerts
- Custom Links

Person Accounts Page Layout

The page layouts for person accounts (clients) should include the following related lists:

- Financial Accounts
- Holdings
- Client Interests
- Know Your Client
- Open Activities
- Activity History
- Partners
- Account Team
- Notes & Attachments

Verifying the Know Your Client Approval Process

Salesforce for Wealth Management includes an approval process that routes Know Your Client forms to the appropriate Salesforce users for approval.

SEE ALSO:

Salesforce for Wealth Management Overview

Managing Wealth Management Clients

Managing the Know Your Client Approval Process

About the Know Your Client Approval Process

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

USER PERMISSIONS

To create, edit, delete, or clone approval processes:

- "Customize Application"

To view approval processes:

- "View Setup and Configuration"

The Know Your Client approval process is included in Salesforce for Wealth Management and has the following general definition:

1. A financial advisor creates a new Know Your Client record.

   Note: Data from a saved Know Your Client record can be merged into a printable Microsoft Word document using the provided mail merge template.

2. A financial advisor submits the Know Your Client record for approval, which sets the following actions in motion:
   - The Know Your Client record is locked and cannot be edited
   - `KYC Approval Status` becomes "Pending Approval"
   - `Date Know Your Client Submitted` becomes today
   - Know Your Client record type becomes "KYC Submitted"
   - An approval request is routed to the appropriate Salesforce user for review, and he or she is also sent an email notification using the appropriate email template

3. The lead financial advisor approves or rejects the approval request, which causes the following actions:
   - The record continues to be locked and cannot be edited
   - `KYC Approval Status` becomes "Approved" or "Rejected"
   - `Date KYC Approved/Rejected` becomes today
   - If the record was approved, a follow-up task is scheduled for the financial advisor to review the Know Your Client form in six months

Activating the Know Your Client Approval Process

To activate the Know Your client approval process:

1. From Setup, enter *`Approval Processes`* in the `Quick Find` box, then select **Approval Processes**.
2. In the `Manage Approval Processes For` drop-down list, select "Know Your Client."
3. Click **Activate** next to the approval process name.

SEE ALSO:

Salesforce for Wealth Management Overview

Managing Wealth Management Clients

Navigating the Salesforce for Wealth Management App

To access the Salesforce for Wealth Management app, go to the Force.com app menu in the top right corner of any Salesforce page and select Salesforce for Wealth Management. To get started on any task, just click the tab you want.

SEE ALSO:

Salesforce for Wealth Management Overview

Managing Wealth Management Clients

Managing Wealth Management Clients

Clients are exclusively available in Salesforce for Wealth Management. A client is a person who you advise or do business with, a prospect who you potentially will do business with, or a professional relationship such as an accountant or lawyer. You can manage your clients on the Clients tab. In standard Salesforce terminology, clients are called "accounts." However, Salesforce for Wealth Management uses the term "clients."

USER PERMISSIONS

To view the Clients tab:
- "Read" on accounts

To view clients:
- "Read" on accounts

To create clients:
- "Create" on accounts and contacts

Clients have all of the standard capabilities of account records.

In addition, the special capabilities of clients are as follows:

Client Record Types

Record types are categories that allow you to organize your records. You can assign client records to the following record types:

- "Business" specifies a corporate entity or trust
- "Individual" specifies an existing or prospective client
- "Professional Relationship" specifies an accountant, lawyer, or other professional relationship

Client List Views

On the Clients tab, you can use list views to conveniently access different sets of clients. For example, select "My A Clients" to view a list of your clients who have an "A" rating.

Client Details

The client detail page includes groups of fields tailored to wealth management clients. For example, one section tracks a client's preferences in several categories — you can specify that a client is interested in vacation homes, mid-cap stocks, the retail and entertainment sectors, golf, and US politics.

Financial Accounts Related List

The Financial Accounts related list provides an overview of the client's financial accounts, such as account names, account numbers, and current values. This information comes from the records on the Financial Accounts tab.

Holdings Related List

The Holdings related list provides an overview of the client's owned assets such as funds, stocks, and bonds. For each holding you can see values such as market value, last price, purchase price, and number of shares. This information comes from the records on the Holdings tab. Note that each holding is associated with a financial account record.

Client Interests Related List

The Client Interests related list provides an overview of the securities that the client is interested in buying or selling. This information comes from the records on the Client Interests tab.

Know Your Clients Related List

The Know Your Clients related list provides an overview of the Know Your Client forms that are associated with the client. This information comes from the records on the Know Your Clients tab.

Relationships Related List

A relationship refers to a client who has a role in the life of another client, such as a spouse, child, accountant, or attorney. Relationships are tracked in the Relationships related list on the client detail page, which is available as an option. In standard Salesforce terminology, relationships are called "partners." However, Salesforce for Wealth Management uses the term "relationships."

Client Team Related List

The Client Team related list tracks the financial advisors and other Salesforce users who are involved in the management of a particular client. In standard Salesforce terminology, client teams are called "account teams." However, Salesforce for Wealth Management uses the term "client teams."

Relationship Group Members Related List

The Relationship Group Members related list displays the relationship groups of which the client is a member. It is available as an option and is called "Household Members" in some organizations.

SEE ALSO:

Salesforce for Wealth Management Overview

Navigating the Salesforce for Wealth Management App

Salesforce for Wealth Management Reports and Dashboards

USER PERMISSIONS

To run reports:

- "Run Reports"

  AND

  "Read" on the records included in reports

To view dashboards:

- "Run Reports"

  AND

  Access to view dashboard folders

Salesforce for Wealth Management Reports

Salesforce for Wealth Management offers industry-specific reports, which are grouped in the following folders on the Reports tab:

- Client Reports
- Client Interest Reports
- Financial Account Reports
- Holdings and WM Asset Reports
- Know Your Client Reports

To access these reports, select the appropriate folder from the drop-down list on the Reports tab, then click the appropriate report name.

Salesforce for Wealth Management Dashboards

Salesforce for Wealth Management offers industry-specific dashboards, such as a dashboard of financial accounts that allows you to analyze your book of business. To access these dashboards, go to the Dashboards tab and select the appropriate dashboard name from the drop-down list.

Note: You can see a dashboard snapshot on the Home tab.

SEE ALSO:

Salesforce for Wealth Management Overview

Navigating the Salesforce for Wealth Management App

Establishing Relationship Groups of Your Customers

Campaigning and Generating Leads

Planning, Managing, and Tracking Campaigns

Campaigns

Manage outbound marketing campaigns with direct mail programs, seminars, print ads, email, and other kinds of marketing collateral. Organize campaigns into hierarchies for easy analysis to see what works best for increasing your company's sales.

Salesforce makes it easy for you to quickly locate, manage, and report on campaigns.

SEE ALSO:

Campaigns Home

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Campaigns Home

Clicking on the Campaigns tab displays the campaigns home page. Any user can access the campaigns home page.

- 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**.
- In the **Recent Campaigns** section, select an item from the drop-down list to display a brief list of the top campaigns matching that criteria. From the list, you can click any campaign name to go directly to the campaign detail. Toggle the **Show 25 items** and **Show 10 items** links to change the number of items that display. The fields you see are determined by the "Campaigns Tab" search layout defined by your administrator and by your field-level security settings (available in Enterprise, Unlimited, Performance, and Developer Editions only). The Recent Campaigns choices are:

Recent Campaigns Choice	Description
`Recently Viewed`	The last ten or twenty-five campaigns you viewed, with the most recently viewed campaign listed first. This list is derived from your recent items and includes records owned by you and other users.
`My Active Campaigns`	The most recent ten or twenty-five campaigns marked as Active, with the most recently created campaign listed first. This list only includes records owned by you.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view Campaigns tab:
- "Read" on campaigns

To view campaigns:
- "Read" on campaigns

To create campaigns:
- "Create" on campaigns

- In the **Recent Campaigns** section, click **New** to create a new campaign.
- Under **Reports**, click any report name to jump to that report.

SEE ALSO:

Campaigns

Viewing Campaign Hierarchies

A campaign hierarchy allows you to group campaigns together within a specific marketing program or initiative, which enables you to analyze related marketing efforts more efficiently.

To view the hierarchy for a campaign, click **View Hierarchy** next to the `Campaign Name` field on the campaign detail page. If a campaign is not part of a hierarchy, its corresponding Campaign Hierarchy page shows only the campaign you selected.

A campaign hierarchy shows campaigns that are associated with one another via the `Parent Campaign` field. A hierarchy illustrates a relationship between campaigns, such as a grouping of campaigns within a specific marketing tactic. Each campaign can have only one parent campaign but an unlimited number of sibling campaigns, and a campaign hierarchy can contain a maximum of five levels or generations. In other words, a campaign hierarchy has a maximum depth of five levels but an unlimited breadth on each level. Campaign members, such as contacts and leads, can be included on any level.

On the Campaign Hierarchy page, campaigns are indented to show that they are related to the campaigns above them. Campaigns are listed in descending order based on their hierarchy level. Click any campaign name to open the detail page for that campaign.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view campaigns:
- "Read" on campaigns

Statistics for an individual campaign are in the Campaign Statistics section of the campaign detail page. Aggregate statistics for parent and child campaigns are in the Campaign Hierarchy related list.

Note: To ensure accurate reporting, all campaigns in a hierarchy must use the same currency.

SEE ALSO:

Set Up Campaign Hierarchies

Viewing Campaign Hierarchy Statistics

Viewing Campaign Hierarchy Statistics

Campaign detail pages include a Campaign Hierarchy related list, which displays a parent campaign and all the campaigns directly below the parent campaign in the campaign hierarchy. You can create a campaign hierarchy by associating campaigns with one another using the `Parent Campaign` lookup field on the campaign detail page. Click any campaign in the related list to open the detail page for that campaign.

The Campaign Hierarchy related list provides statistics fields for each campaign in the list as well as the total value for the parent campaign and all the campaigns below it in the campaign hierarchy. Statistics fields are not visible in the related list until campaign hierarchies are enabled for your organization. For more information and a list of fields, see Set Up Campaign Hierarchies on page 137.

The Campaign Hierarchy related list shows a maximum of two hierarchy levels: the parent campaign and its child campaigns. If a child campaign has children, those children do not appear in the related list but their data is included in the campaign hierarchy statistic field values. The campaign hierarchy statistic fields provide aggregate data regardless of whether you have sharing rights to view individual campaigns within the hierarchy. However, if you do not have access to a campaign that appears in the related list, you cannot view its detail page from the link on the related list. To view all the levels in a campaign hierarchy, click the **View Hierarchy** link next to the `Campaign Name` on the campaign detail page.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view campaigns:
- "Read" on campaigns

To view campaign hierarchies:
- "Read" on campaigns

SEE ALSO:

Displaying and Editing Campaigns

Campaign Fields

Displaying and Editing Campaigns

Displaying Campaigns

Once you have located a campaign on the campaigns home or list pages, click the campaign name to display detailed information. You can also select a campaign name from the Campaign History related list of an associated lead, contact, or person account. If hover details are enabled, hover over any lookup field on the detail page to view key information about a record before clicking into that record's detail page.

Editing Campaigns

To update a campaign, click **Edit**, and then change the fields you want to update. When you have finished, click **Save**. You can also click **Save & New** to save the current campaign and create another.

Use inline editing to edit fields directly on the detail page. If inline editing isn't enabled, contact your administrator.

Note: To edit a campaign that is a child of another campaign, you must have at least "Read" access on the parent.

Creating Campaign Hierarchies

When creating or editing a campaign you can use the `Parent Campaign` lookup field to assign a parent to your campaign. In the lookup dialog you can search for an existing campaign or create a new parent campaign. For more information on configuring campaign hierarchies for your organization, see Set Up Campaign Hierarchies on page 137.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view campaign lists:
- "Read" on campaigns

To change campaigns:
- "Edit" on campaigns

  AND

  `Marketing User` checked in your user information

Calculating Campaign Statistics

The campaign detail includes campaign statistic fields, which are updated automatically and include values from all associated records regardless of whether you have read access to those records. If you have campaign hierarchies enabled, the Campaign Hierarchy related list contains aggregate statistics for a parent campaign and all the campaigns below it in the campaign hierarchy.

Note: The campaign statistics calculation process runs every two minutes and processes one campaign's statistics at a time. If there are a large number of campaigns or campaigns with large numbers of campaign members pending, there may be a delay of 10 minutes or more.

Linking Contacts, Leads, or Person Account to Campaigns

Select one of the following options from the **Manage Members** drop-down button on the campaign detail page:

- **Add Members - Search** to add campaign members from a search.
- **Add Members - Import File** to add campaign members by importing leads from a comma-delimited text file (.csv).
- **Edit Members - Search** to view, update, or delete existing campaign members.
- **Update & Add Members - Import File** to edit campaign member status using an import file.

Advanced Setup

Click **Advanced Setup** to customize the `Member Status` values for a campaign. See Customizing Campaign Setup on page 136.

Campaign Related Lists

- Hover over the links at the top of a detail page to display the corresponding related list and its records. If Chatter is enabled, hover links display below the feed. An interactive overlay allows you to quickly view and manage the related list items. Click a hover link to jump to the content of the related list. If hover links are not enabled, contact your Salesforce administrator.
- The lower portion of the display provides information related to the campaign including activities, attachments, campaign members, campaign hierarchies, and the opportunities that resulted from the campaign. The related lists you see are determined by your personal customization, and by any customization your administrator has made to page layouts or your permissions to view related data. You can click individual items to display additional detail. Click **More** at the bottom of the page or **View More** below a related list to display more items.

Printing Campaigns

To view a printable display of all information for the campaign, click **Printable View** on the campaign detail page. Use your browser's Print function to print the display.

Sharing

To share a campaign with other users, groups, or roles, click **Sharing**. See Sharing Campaigns on page 158.

To return to the last list page you viewed, click **Back to list** at the top of the campaign detail page. If your organization has enabled collapsible page sections, use the arrow icons next to the section headings to expand or collapse each section on the detail page.

Customizing Campaign Setup

For each campaign, Marketing Users must define campaign `Member Status` values. These are the statuses that a lead, contact, or person account may have for a campaign. For example, you might define values of "Planned," "Sent Invitation," "RSVP," and "Attended" for a conference.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view campaigns:
- "Read" on campaigns

To customize member status values:
- "Edit" on campaigns

  AND

  `Marketing User` checked in your user information

User Privileges for Customizing Campaign Setup

- Anyone can view a campaign's advanced setup. You can *edit* advanced setup if:
  - The `Marketing User` checkbox is selected in your user information
  - You have the "Edit" permission on campaigns
  - You have at least read/write sharing access on the campaign record
- If you replace member status values, all campaign records are updated regardless of your sharing access to the related contacts or leads.

Defining Member Status Values

New campaigns have two default member status values: "Sent" and "Responded". You can edit them or create new ones.

1. Click **Advanced Setup** on a campaign detail page.
2. Click **Edit**.
3. Update the existing entries or add new values.
4. Click **Add More** as needed to add additional entries. You can add up to 50 entries.
5. Select one entry as the "Default" value.
6. Choose which values will be counted as "Responded." Members with "Responded" values are tallied in the `Total Responses` field on the campaign.

   Note: Modifying the Responded checkbox has broad effects. When you select or deselect the Responded checkbox, campaign statistics and campaign member details change accordingly. Specifically, the fields `Responded`, `Last Responded Date`, and `Last Modified` change on the campaign member record. For example, if you're working with a status called "Attended" and you select the `Responded` checkbox for it, existing campaign members whose status is "Attended" will then be counted as responses in campaign statistics and the aforementioned date fields will update.

Replacing Member Status Values

You can globally replace the `Member Status` values for each campaign member. For example, you may decide that "Attended" is a more appropriate value than "Showed Up."

1. Click **Advanced Setup** on a campaign detail page.
2. Click **Replace** in the Member Status Values related list.
3. Enter the value you want to change, and select the new value.
4. Click **Save**.

Note: Replacing the campaign member status doesn't recalculate roll-up summary fields or fire workflow, triggers, or validation rules.

Set Up Campaign Hierarchies

Analyze and report on the health of your related campaigns. By associating campaigns with one another using a lookup relationship, you can group campaigns within a specific marketing program or initiative.

Hierarchies contain up to five levels. Each campaign can have one parent campaign, but an unlimited number of sibling campaigns.

To set up campaign hierarchies, add the `Parent Campaign` field to your campaign page layout and enable the campaign hierarchy statistics fields.

The process for making the fields visible depends on your Salesforce edition. For Enterprise, Unlimited, Performance, and Developer editions, use field-level security. As you make each field visible, Salesforce displays the field's value in the **Hierarchy Total** section of the Campaign Hierarchy related list. For Professional Edition, add the campaign hierarchy statistic fields to the campaign page layout; the fields will appear on the page layout and in the **Hierarchy Total** section of the Campaign Hierarchy related list.

Note: The campaign hierarchy fields provide aggregate data for a parent campaign and all the campaigns below it in the campaign hierarchy, regardless of whether a user has sharing rights to a particular campaign within the campaign hierarchy. Therefore, consider your organization's campaign sharing settings when enabling campaign hierarchy fields. If you do not want users to see aggregate hierarchy data that includes campaigns to which the users do not have access, you can choose to remove any or all of the campaign hierarchy fields from the Campaign Hierarchy related list. If you do not add the campaign hierarchy fields to the related list or page layout, you can still access these fields on reports.

Once campaign hierarchies are set up, users can create and assign parent campaigns using `Parent Campaign` and then view details about the hierarchy on the Campaign Hierarchy page or the Campaign Hierarchy related list.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create a campaign hierarchy:

- "Create" on campaigns

  AND

  `Marketing User` enabled in your user detail page

To set up campaign hierarchies:

- "Customize Application"

Note: All campaigns within a hierarchy must use the same currency.

The Campaign Hierarchy page, accessible from the **[view hierarchy]** link next to the **Campaign Name** on the campaign record, shows all the levels in a hierarchy and the campaigns included in each level. For more information, see Viewing Campaign Hierarchies on page 133. The Campaign Hierarchy related list provides aggregate data for the parent campaign and all the campaigns below it in the hierarchy. For more information see Viewing Campaign Hierarchy Statistics on page 134.

SEE ALSO:

Customizing Campaign Setup

Campaign Fields

Associating Influential Campaigns to Opportunities

Add Influential Campaigns to an Opportunity

Associate multiple influential campaigns to a single opportunity.

If enabled, automatic association will add influential campaigns to opportunities when the campaign is related to a contact that is assigned a contact role on the opportunity prior to the opportunity close date. You can specify additional automatic association criteria, including a campaign influence time frame that limits the amount of time a campaign can influence a new opportunity after the campaign first associated date and before the opportunity created date. Influential campaigns can also be added to opportunities manually by clicking the **Add Campaign** button in the Campaign Influence related list.

1. From the object management settings for Opportunities, go to Page Layouts.
2. Add the Campaign Influence related list to the opportunities page layout.
3. Set up campaign influence.

SEE ALSO:

Campaign Fields

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up campaign influence:

- "Customize application"

To view the campaign influence related list:

- "Read" on campaigns

  AND

  "Read" on opportunities

To manually add influential campaigns:

- "Read" on campaigns

  AND

  "Edit" on opportunities

Configure Campaign Influence

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up campaign influence:

- "Customize application"

Setting up Campaign Influence

You can configure influential campaigns to be automatically added to opportunities. When automatic association is enabled, influential campaigns are added to opportunities when a campaign is related to a contact that is assigned a contact role on an opportunity prior to the close date of the opportunity. For example, if you have an email campaign with a member who is assigned a contact role on an open opportunity, the email campaign will be added to the Campaign Influence related list for that opportunity.

You can set a Campaign Influence Time Frame that specifies the maximum number of days between the campaign first associated date and the opportunity created date, during which a campaign is considered influential. For example, if you specify a Campaign Influence Time Frame of 15 days and one of your contacts becomes a member of a campaign on June 1, the campaign is considered influential to any opportunity that is created and associated with the contact by June 15. Use the association rules to configure additional criteria that campaigns must meet to be automatically associated to an opportunity.

When automatic association is disabled, users must manually add influential campaigns to opportunities using the Campaign Influence related list.

To set up automatic association for campaign influence:

1. From Setup, enter `Campaign Influence` in the `Quick Find` box, then select **Campaign Influence**.
2. Select `Enabled`.
3. In the `Campaign Influence Time Frame` field, optionally specify the maximum number of days between the campaign first associated date and the opportunity created date.

   Note: Campaigns associated to a contact prior to this time frame will not be considered influential. The maximum campaign influence time frame is 9,999 days. If you do not want to specify a campaign influence time frame, leave the `Campaign Influence Time Frame` field blank.

4. Optionally, define additional filter criteria that must be met in order for a campaign to be automatically associated.
5. Click **Save**.

Campaigns will be automatically added to the Campaign Influence related list on opportunities when they meet the criteria you specified.

To disable automatic association for campaign influence:

1. From Setup, enter `Campaign Influence` in the `Quick Find` box, then select **Campaign Influence**.
2. Select `Disabled`.
3. Click `Save`.

SEE ALSO:

Add Influential Campaigns to an Opportunity

Campaign Fields

Adding Influential Campaigns to Opportunities

Manage lists of campaigns that influence your opportunities directly on opportunity detail pages.

Consider these details before adding influential campaigns to your opportunities.

- Though multiple campaigns can be influential, you can designate only one campaign as the primary campaign source on the opportunity.
- The campaign you designate as the primary campaign source will always appear in the Campaign Influence related list.
- The opportunities fields of the campaign statistics section on a campaign detail page will populate for only the campaign you designate as the primary campaign source. For example, you have an email campaign and a telemarketing campaign that both influence the same opportunity, and you designate the email campaign as the primary campaign source. The campaign statistics opportunities fields will populate for only the email campaign.
- When you select `Primary Campaign Source`, the `Primary Campaign Source` field on the opportunity detail page updates with the name of the primary campaign. It's possible that workflow and Apex rules on opportunities can be triggered by this change.
- When you add campaigns using **Add Campaign** in the Campaign Influence related list, campaign member details don't appear in the related list.

Let's now add influential campaigns from the Campaign Influence related list.

1. View the detail page of an opportunity.
2. Click **Add Campaign** in the Campaign Influence related list.
3. Enter a campaign name in the `Campaign name` field or click to search for a campaign.
4. If you want to designate the campaign as the primary campaign, select `Primary Campaign Source`.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view the campaign influence related list:

- "Read" on campaigns

  AND

  "Read" on opportunities

To manually add influential campaigns:

- "Read" on campaigns

  AND

  "Read" and "Edit" on opportunities

You can also configure filter criteria that, when met, will automatically add influential campaigns to opportunities. For example, you can configure a filter to add only email and telemarketing campaigns.

SEE ALSO:

Add Influential Campaigns to an Opportunity

Configure Campaign Influence

Managing Campaign Members

Editing Multiple Campaign Members

Editing Campaign Members from the Manage Members Page

Note: Before using the Manage Members page, verify that you are using a supported browser.

To update the campaign member status, edit campaign member details, or remove campaign members from the Manage Members page:

1. Click **Manage Members** and choose **Edit Members - Search** from the drop-down button on a campaign detail page or the Campaign Members related list on a campaign detail page.
2. On the Existing Members subtab, optionally enter filter criteria to find existing members and click **Go!**.

   Note: For campaigns with campaign members created from both leads and contacts, you must have "Read" permission on leads and contacts to see all members. If you only have "Read" on leads, you will only see campaign members created from leads; if you only have "Read" on contacts, you will only see campaign members created from contacts.

3. Select the checkboxes next to the records you want to edit. To select all records on the current page, select the checkbox in the header row.
4. Optionally perform the following actions:
   - To change the campaign member status, select a status from the **Update Status** drop-down list.
   - To remove a member from a campaign, click **Remove**.
   - To edit the details of a campaign member, click **Edit**.
   - To view, edit, delete, clone, a campaign member, click the campaign member's name in the Name column.

The latest Manage Members page is not available in accessibility mode. In accessibility mode, you can still add contacts or leads to a campaign, update campaign members, using the campaign member wizards.

SEE ALSO:

Using the Campaign Members Related List

Adding Multiple Campaign Members

Displaying and Editing a Campaign Member

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view the Existing Members tab:

- "Edit" on campaigns

  AND

  "Read" on leads or contacts

  AND

  `Marketing User` checked in your user information

To update and remove campaign members:

- "Edit" on campaigns

  AND

  "Edit" on leads and contacts

  AND

  `Marketing User` checked in your user information

Using the Campaign Members Related List

With the Campaign Members related list, you can view, add, edit, or remove campaign members directly from a campaign detail page.

The Campaign Members related list displays five campaign members by default. To display more members, click the **Show more** link.

Note: For campaigns with campaign members created from both leads and contacts, you must have "Read" permission on leads and contacts to see all members. If you only have "Read" on leads, you will only see campaign members created from leads; if you only have "Read" on contacts, you will only see campaign members created from contacts.

The **Manage Members** drop-down button in the Campaign Members related list and in the campaign detail section lets you search for leads and contacts and add them as campaign members, update or remove existing members, and add and update campaign members using an import file.

From the Campaign Members related list:

- Click the campaign member's name in the Name, First Name, or Last name column to view the campaign member details.
- Click **Remove** to remove a campaign member from the campaign.
- To edit the campaign member details, click **Edit**.
- Select one of the following from the **Manage Members** drop-down button:
  - **Add Members - Search** to add campaign members from a search.
  - **Add Members - Import File** to add campaign members by importing leads from a comma-delimited text file (.csv).
  - **Edit Members - Search** to view, update, or delete existing campaign members.
  - **Update & Add Members - Import File** to edit campaign member status using an import file.

SEE ALSO:

Adding Multiple Campaign Members

Editing Multiple Campaign Members

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view campaigns:
- "Read" on campaigns

To view the campaign members related list:
- "Read" on campaigns

  AND

  "Read" on leads or contacts

To edit the campaign members related list:
- "Read" on campaigns

  AND

  "Read" on leads or contacts

To view and use the **Manage Members** button on the campaign members related list:
- "Edit" on campaigns

  AND

  "Read" on leads or contacts

Adding Multiple Campaign Members

Adding Campaign Members from the Manage Members Page

You can add leads and contacts as members of a campaign from the Manage Members page. To add contacts to a campaign, the `Add to Campaign` checkbox must be enabled.

Note: Before using the Manage Members page, verify that you are using a supported browser.

To add campaign members from the Manage Members page:

1. Click **Manage Members** and choose **Add Members - Search** from the drop-down button on a campaign detail page or the Campaign Members related list.
2. On the Add Members subtab, select the `Leads` or `Contacts` radio button to add leads or contacts, respectively.
3. Search for leads or contacts:
   - You can specify search filters and click **Go!**
   - Alternatively, you can select an existing view, such as all open leads, from the Use Existing View drop-down list. Your results will display automatically. If you select an existing view, you can modify its criteria by adding or changing filters, and clicking **Go!**.

     Note: You cannot modify filter criteria if you selected a view that uses advanced options or that uses more than five filters. Filter criteria will be reflected in your search results for these views, though not all filter criteria will display.
4. Select the checkboxes next to the records you want to add. To select all records on the current page, select the checkbox in the header row.
5. Select a status from the **Add with Status** drop-down list.

A confirmation message will display and you will see the members you added on the Existing Members subtab.

Note: If you are unable to add contacts, enable the `Add to Campaign` checkbox:

1. From the object management settings for contacts, go to Search Layouts.
2. Click **Edit** next to Contacts List View.
3. Select `Add to Campaign`.
4. Click **Save**.

The latest Manage Members page is not available in accessibility mode. In accessibility mode, you can still add contacts or leads to a campaign, update campaign members, using the campaign member wizards.

SEE ALSO:

Using the Campaign Members Related List

Editing Multiple Campaign Members

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add campaign members:

- "Edit" on campaigns

  AND

  "Edit" on leads and contacts

  AND

  `Marketing User` checked in your user information

To remove campaign members:

- "Read" on campaigns

  AND

  "Edit" on leads or contacts

Add Campaign Members from Reports

USER PERMISSIONS	
To add campaign members from a contact report:	`Marketing User` checked in your user information AND "Edit" on campaigns AND "Read" on contacts AND "Read" on reports
To add campaign members from a lead report:	`Marketing User` checked in your user information AND "Edit" on campaigns AND "Read" on leads AND "Read" on reports
To add campaign members from a person account report:	`Marketing User` checked in your user information AND "Edit" on campaigns AND "Read" on contacts AND "Read" on reports

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

To add leads, contacts, or person accounts from a report to a campaign:

1. Click **Add to Campaign** from a campaign, contact, lead, or person account report that returns lead, contact, or person account records.

   Tip: You must have sharing access to view the lead or contact you are adding.

   If your report returns more than 50,000 records, the button will be disabled. You can modify your report to return fewer records.

2. Use the lookup icon to choose a campaign to which the report results will be added.
3. Choose a member status for the contacts, leads, or person accounts you are adding to the campaign.
4. Choose whether or not to override the member status of members who already exist in the campaign.

If you choose to override the status of existing campaign members, you will be updating their member statuses to whatever value you selected in the previous step.

5. Click **Add to Campaign**.
6. Review the confirmation screen.
7. Click **Done** to return to the report.

Note: You can add campaign members directly from a tabular, summary, or matrix report, but not from a joined report.

Consider the following additional tips when adding campaign members from a report:

- Campaign members are added in batches, so in the event that the process is interrupted, for example, by clicking **Cancel**, some members will still be added.
- If lead or contact records are edited after you click **Add to Campaign** but before they are actually added, they will not be added to the campaign.
- You cannot add converted leads to campaigns. If any converted leads are included in a report, they will be ignored during the add to campaign process.

Adding Contacts or Leads from a List View to a Campaign

USER PERMISSIONS	
To add multiple existing contacts to a campaign:	`Marketing User` checked in your user information AND "Edit" on campaigns AND "Edit" on contacts
To add multiple existing leads to a campaign:	`Marketing User` checked in your user information AND "Edit" on campaigns AND "Edit" on leads
To add multiple person accounts to a campaign:	`Marketing User` checked in your user information AND "Edit" on campaigns AND "Edit" on contacts

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

To add existing contacts, leads, or person accounts to a campaign from a list view:

1. Navigate to a list view of contacts or leads, such as the "My Contacts" list view. You can create custom list views that restrict results according to campaign name and optionally also by campaign member status.

   Tip: You must have sharing access to view the lead or contact you are adding.

2. Check the boxes next to the records you want to select. Optionally, check the box in the column header to select all currently displayed items. Up to 250 records can display on the page at a time.
3. Click **Add to Campaign**.
4. In the first step of the wizard, enter the name of the campaign you want to update, or click the lookup icon to search for and select an existing campaign.
5. Choose whether or not to override the member status of members who already exist in the campaign.

   If you choose to override the status of existing campaign members, you will be updating their member statuses to whatever value you selected in the previous step.

6. Click **Add to Campaign**.
7. In the second step of the wizard, review confirmation messages about the members you selected. If a selected member already existed in the campaign, then its member status value will have been updated.
8. Click **Done** to exit the wizard and return to the list view.

Displaying and Editing a Campaign Member

From the campaign member detail page, you can edit, delete, or clone a campaign member record. Additionally, if the campaign member is based on a lead, you can convert the lead; if the campaign member is based on a contact, you can create an opportunity.

To view the campaign member detail page, click the campaign member's name in the Name, First Name, or Last Name columns on the Campaign Members related list on a campaign detail page or on the Existing Menbers tab.

Note: To view a campaign member, you must have permissions on the campaign and the lead or contact. For example, to view a campaign member created from a lead, you must be able to view both the campaign and the lead.

To edit the campaign member detail page layout, from the object management settings for campaign members, go to Page Layouts, and then click **Edit** next to the page layout name.

Editing a Campaign Member

To edit a campaign member, click **Edit** on the campaign member detail page, change the fields you want to update, then click **Save**. Fields derived from the contact or lead can only be edited from the lead or contact detail pages.

Note: If your administrator has enabled inline editing for your organization, you cannot use inline editing on the `Status` drop-down list on the campaign member detail page. Instead, click **Edit** on the campaign detail page to edit the `Status` drop-down list.

Cloning a Campaign Member

To clone a campaign member, click **Clone** on the campaign member detail page, then select a campaign and a contact or lead. Change the fields you want to clone for the new campaign member, then click **Save**.

Deleting a Campaign Member

To delete a campaign member, click **Delete** on the campaign member detail page.

Note: Deleting a campaign member record is permanent; the record is not recoverable from the recycle bin. However, the original lead or contact record is not deleted.

Converting a Lead

If the campaign member was created from a lead, you can click **Convert Lead** on the campaign member detail page to convert the lead. When you convert a lead, the campaign member is still a part of the campaign, but its type changes from lead to contact.

Creating an Opportunity

If the campaign member was created from a contact, you can click **Create Opportunity** on the campaign member detail page to create an opportunity. When you create an opportunity, the campaign member is still a part of the campaign.

SEE ALSO:

Campaign Member Fields

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view, edit, or remove campaign members:

- "Read" on campaigns

  AND

  "Read" on leads

  AND

  "Read" on contacts

To add campaign members:

- "Read" on campaigns

  AND

  "Edit" on leads

  AND

  "Edit" on contacts

Campaign Member Fields

These are the fields (in alphabetical order) that make up a campaign member. Most campaign member fields are derived from the lead or contact record from which the campaign member was created and must be edited from the corresponding lead or contact record. Some of these fields may not be visible or editable depending on your page layout and field-level security settings.

EDITIONS

Available in: Salesforce Classic

The available fields vary according to which Salesforce Edition you have.

Field	Description
`Campaign`	The campaign to which the lead or contact belongs.
`Campaign Member Currency`	The default currency for currency amount fields on the campaign member. Amounts display in the campaign member currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.
`Campaign Member Type`	The record type of the campaign member, which determines the page layout available for the campaign member. (Read only)
`City`	City portion of the lead or contact's address.
`Company (Account)`	The company, if the campaign member is based on a lead, or the account, if the campaign member is based on a contact.
`Contact`	The name of the contact, if the campaign member is based on a contact.
`Country`	Country portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
`Created By`	User who created the campaign member. (Read only)
`Created Date`	Date the campaign member was created. (Read only)
`Description`	Description of the lead or contact.
`Do Not Call`	Whether the contact wants to be contacted by phone. If you use Data.com, the `Phone` field value is hidden from search results and on the Contact Card, and it's blank in `.csv` files that are created when you export records.
`Email`	Email address of the lead or contact.
`Email Opt Out`	Whether the contact wants to receive email. If you use Data.com, the `Email` field value is hidden from search results and on the Contact Card, and it's blank in `.csv` files that are created when you export records.
`Fax`	Fax number of the lead or contact.
`Fax Opt Out`	Whether the contact wants to be included in broadcast faxes.
`First Name`	First name of the lead or contact.
`First Responded Date`	Date the campaign member first responded. (Read only)

Field	Description
`Last Modified By`	User who last changed the campaign member record. (Read only)
`Last Modified Date`	Date the campaign member record was last modified. (Read only)
`Last Name`	Last name of the lead or contact.
`Lead`	The name of the lead, if the campaign member is based on a lead.
`Lead Source`	Source of lead, for example, Advertisement, Partner, or Web. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
`Mobile`	Mobile phone number for the lead or contact.
`Phone`	Phone number for the lead or contact.
`Responded`	Indicates if the campaign member has responded.
`Salutation`	The salutation for addressing the person, for example, Mr., Ms., Dr., or Prof.
`State/Province`	State or province portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
`Status`	The status of the campaign member, for example, sent or responded.
`Street`	Street portion of the lead or contact's address.
`Title`	The title of the lead or contact, for example, President.
`Zip/Postal Code`	Zip or postal code portion of the lead or contact's address.

SEE ALSO:

Displaying and Editing a Campaign Member

Adding Multiple Campaign Members

Importing Campaign Members

USER PERMISSIONS

To change campaigns:	"Edit" on campaigns AND `Marketing User` checked in your user information
To import leads as campaign members:	"Edit" on campaigns AND `Marketing User` checked in your user information AND "Import Leads"

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

To use the campaign update wizard:	"Edit" on campaigns AND `Marketing User` checked in your user information AND "Import Leads" AND "Read" on contacts

With the two campaign import wizards, designated Marketing Users can use CSV (comma-separated values) files to import new leads and track the responses of leads and contacts at each stage of a campaign.

Note: If commas are not appropriate for your locale, use a tab or other delimiter.

To use one of the import wizards, click the **Manage Members** drop-down button on a campaign detail page and select one of the following:

- **Add Members - Import File** then click **Leads**: With the Data Import Wizard, you can import a list of new names. Salesforce creates leads in the system, and associates those leads with your campaign to create new campaign members.
- **Update & Add Members - Import File** then click **Update & Add Campaign Members**: With the Update Campaign Member Status, you can import a list of existing Salesforce contacts and leads. Salesforce associates the records with your existing campaign member records, and updates their response history. In addition, any new leads or contacts added using the Campaign Update Wizard will be added as members of the campaign.

Using the Data Import Wizard with Campaigns

With the Data Import Wizard, you can import a list of up to 50,000 new leads and associate them with a campaign. Use this wizard for campaigns that generate new leads.

Tips for Using the Data Import Wizard

- If names in your import file match existing leads, duplicate leads are created.
- If duplicate names exist in the import file, duplicate leads are created.

Using the Data Import Wizard

1. Prepare your list of names according to the specifications for mapping fields in your lead import file.
2. Click the **Manage Members** drop-down button and select **Add Members - Import File** on the detail page of the campaign you want to update.
3. Click **Leads**.
4. Click **Update existing records**.
5. Select a lead source.
6. Select an assignment rule to assign the leads.
7. Optionally choose to use assignment rule settings to notify the new record owners.
8. Select the default member status for leads with blank or invalid statuses.
9. Select the character encoding of your import file. Most users do not need to change the default setting.
10. Optionally choose to trigger workflow rules for new and updated records.
11. Optionally choose to trigger workflow rules for new campaign members.
12. Choose your import file
13. Click **Next**.
14. Map the Salesforce fields to the fields in your import file, then click **Next**.
15. Map the Salesforce campaign member status field and any campaign member custom fields to your import file, then click **Next**. This is only available if you have campaign member custom fields.
16. Click **Import Now!**.

To verify that leads were imported with the correct member status, view the Campaign History related list on the leads.

EDITIONS

Available in: Salesforce Classic

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

The **Group** Edition can access the Data Import Wizard, but does not have access to campaigns.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To import leads using the Data Import Wizard:

- "Edit" on campaigns

  AND

  `Marketing User` checked in your user information

  AND

  "Import Leads"

SEE ALSO:

Importing Campaign Members

Update Campaign Member Status

Update the status of campaign members with the Campaign Update Wizard. With it, import up to 50,000 contacts and leads to update the statuses for campaign members.

1. Run a contact or lead report in Salesforce, include the `Contact ID` or `Lead ID` field, and export it to Microsoft® Excel®.

   If you are targeting both leads and contacts, combine the exported lead and contact reports into one CSV (comma-separated values) file in Excel. Make sure the `Lead ID` and `Contact ID` values are in the same Excel column.

   Note: If commas are not appropriate for your locale, use a tab or other delimiter.

2. Rename the `Lead ID`/`Contact ID` column to `Record Id`.
3. *Optional:* Add a column called `Status`, and enter the member status for each record. Records with blank or invalid statuses are assigned the default member status you select in the wizard.
4. On the campaign you want to update, click the **Manage Members** drop-down button and select **Update & Add Members - Import File** .
5. Click **Update & Add Campaign Members**.
6. Click **Browse** and choose your import file.
7. Select the default member status for contacts or leads with blank or invalid statuses.
8. Select the character encoding of your import file. Most users do not need to change the default setting.
9. *Optional:* Choose to trigger workflow rules for new and updated records.
10. Click **Next**.
11. Map the Salesforce fields to the fields in your import file, then click **Next**. Campaign member custom field mapping is available if you have campaign member custom fields.
12. Click **Import Now**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To use the Campaign Update Wizard:

- "Edit" on campaigns

  AND

  "Import Leads"

  AND

  "Read" on contacts

  `Marketing User` checked in your user information

Campaign Fields

A campaign has the following fields, listed in alphabetical order. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

Field	Description
`Active`	Checkbox to mark whether the campaign is active or not.
`Actual Cost`	Amount of money spent to run the campaign.
`Budgeted Cost`	Amount of money budgeted for the campaign.
`Campaign Currency`	The default currency for currency amount fields in the campaign. Amounts display in the campaign currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
Campaign Member Type	Record type for campaign members; determines the page layout of the members of the campaign. Available in Enterprise, Unlimited, Performance, and Developer Editions.
Campaign Name	Identifying name for the campaign.
Campaign Owner	Assigned owner of the campaign.
Campaign Record Type	Record type for the campaign; determines the picklist values available for the campaign. Available in Enterprise, Unlimited, Performance, and Developer Editions.
Converted Leads	Number of leads that were converted to accounts due to the marketing efforts in the campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. For more information on converting leads, see Convert Qualified Leads on page 181. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Created By	User who created the campaign including creation date and time. (Read only)
Custom Links	Listing of custom links for campaigns as set up by your administrator.
Description	Description of the campaign. Up to 32KB of data are allowed in this field. Only the first 255 characters display in reports.
End Date	Ending date for the campaign. Responses received after this date are still counted.
Expected Response (%)	Percentage of responses you expect to receive for the campaign.
Expected Revenue	Amount of money you expect to generate from the campaign.
Last Modified By	User who last changed the campaign fields, including modification date and time. This does not track changes made to any of the related list items on the campaign. (Read only)
Num Total Opportunities	Calculated field for number of opportunities associated with the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Num Sent	Number of individuals targeted by the campaign. For example, the number of emails sent.

Field	Description
Num Won Opportunities	Calculated field for number of closed/won opportunities associated with the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Parent Campaign	The campaign above the selected campaign in the campaign hierarchy.
Start Date	Starting date for the campaign.
Status	Status of the campaign, for example, Planned, In Progress. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Total Actual Cost in Hierarchy	Calculated field for the total amount of money spent to run a campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Budgeted Cost in Hierarchy	Calculated field for the total amount of money budgeted for a campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Contacts	Number of individuals on accounts that are associated with the campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Contacts in Hierarchy	Calculated field for number of contacts associated with the campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Converted Leads in Hierarchy	Calculated field for the total number of leads associated with the campaign hierarchy that were converted into accounts, contacts,

Field	Description
	and opportunities. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
`Total Expected Revenue in Hierarchy`	Calculated field for the total amount of money you expect to generate from a campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
`Total Leads`	Number of potential opportunities (leads) associated with the campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
`Total Leads in Hierarchy`	Calculated field for the total number of leads associated with the campaign hierarchy. This number also includes converted leads. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
`Total Num Sent in Hierarchy`	Calculated field for the total number of individuals targeted by a campaign hierarchy, for example, the number of emails sent. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
`Total Opportunities in Hierarchy`	Calculated field for the total number of opportunities associated with the campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.

Field	Description
`Total Responses`	Calculated field for the total number of contacts and unconverted leads that have a `Member Status` equivalent to "Responded" for the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
`Total Responses in Hierarchy`	Calculated field for number of contacts and unconverted leads that have a `Member Status` equivalent to "Responded" for the campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
`Total Value Opportunities`	Calculated field for the amount of all opportunities associated with the campaign, including closed/won opportunities. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency and displays in parentheses. For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount displays in parentheses. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
`Total Value Opportunities in Hierarchy`	Calculated field for total amount of all opportunities associated with the campaign hierarchy, including closed/won opportunities. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. All campaigns in a hierarchy must use the same currency. For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency and displays in parentheses.

Field	Description
	For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount displays in parentheses.
`Total Value Won Opportunities`	Calculated field for amount of all closed/won opportunities associated with the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency. For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount displays in parentheses. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
`Total Value Won Opportunities in Hierarchy`	Calculated field for amount of all closed/won opportunities associated with the campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. All campaigns in a hierarchy must use the same currency. For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency. For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount displays in parentheses. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.

Field	Description
`Total Won Opportunities in Hierarchy`	Calculated field for the total number of won opportunities associated with the campaign hierarchy. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
`Type`	Type of campaign, for example, Direct Mail or Referral Program. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.

Sharing Campaigns

Your administrator defines your organization's sharing model for campaign access. However, you can extend sharing privileges for your own campaigns individually. Use campaign sharing to *increase* access to your campaigns; you cannot restrict access beyond your organization's default access levels.

To view and manage sharing details, click **Sharing** on the campaign detail page. The Sharing Detail page lists the users, groups, roles, and territories that have sharing access to the campaign. On this 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 access to the record for other users, groups, roles, or territories.
- Click **Expand List** to view all users that have access to the record.
- 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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view campaigns:
- "Read" on campaigns

To share campaigns:
- "Read" on campaigns

  AND

  `Marketing User` checked in your user information

Special Considerations

- To share a campaign, you must have Public Full Access to the campaign and have the `Marketing User` checkbox selected in your personal information.
- The **Sharing** button is available depending on your organization-wide default for campaigns.
- Make sure you are sharing records with users who have the appropriate "Read" object permission for viewing the shared records.
- Sharing a campaign does not automatically grant read access to all the campaign members. Make sure that the user you are sharing a campaign with has visibility to the associated leads or contacts.
- The campaign hierarchy statistic fields provide aggregate data for a parent campaign and all the campaigns below it in the hierarchy, regardless of whether a user has sharing rights to a particular campaign within the hierarchy. Therefore, consider your organization's campaign sharing settings when enabling campaign hierarchy statistics. If you do not want users to see aggregate hierarchy data,

remove any or all of the campaign hierarchy statistic fields from the Campaign Hierarchy related list. These fields will still be available for reporting purposes.

SEE ALSO:

Viewing Campaign Hierarchies

Viewing Campaign Hierarchy Statistics

Add Multiple Contacts and Leads to Campaigns

Quickly add lots of contacts, leads, and person accounts as members to your campaigns at one time.

1. From a campaign, click **Manage Members**.
2. Click either **Add Members - Existing Contacts** or **Add Members - Existing Leads**.
3. In the first step of the wizard, choose a campaign member status value to assign to the new members.
4. Click **Next**.
5. Select the records you want to add as campaign members.

SEE ALSO:

Adding Contacts or Leads from a List View to a Campaign

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add multiple contacts, leads, and person accounts to campaigns:

- `Marketing User` in your user information

  AND

  "Edit" on campaigns

  AND

  "Read" on contacts, leads, and person accounts

Planning, Managing, and Tracking Campaigns FAQs

Campaigns FAQ

- Can I use mass email for my email campaigns?
- How can I track which opportunities resulted from campaigns?
- How can I calculate the ROI for my campaigns?
- How can I add contacts and leads to my campaigns?
- How does Primary Campaign Source work?
- How is Campaign influence different from ROI reports?

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

- Who has access to campaigns?

SEE ALSO:

Campaigns

Can I use mass email for my email campaigns?

Mass email is designed for small-scale sales and support mailings, not for marketing purposes. We recommend that you use a third-party email-execution vendor to send emails for marketing campaigns.

SEE ALSO:

Campaigns FAQ

How can I add contacts and leads to my campaigns?

Your company's campaigns typically will target existing customers (contacts) and/or prospective customers (leads). Both contacts and leads can be associated with your campaigns as campaign members. You can easily add members from a campaign member detail page by clicking the Manage Members drop-down button in the campaign detail section or in the Campaign Members related list, then selecting one of the following options:

- **Add Members - Search** to add campaign members from a search.
- **Add Members - Import File** to add campaign members by importing leads from a comma-delimited text file (.csv).
- **Edit Members - Search** to view, update, or delete existing campaign members.
- **Update & Add Members - Import File** to edit campaign member status using an import file.

The following tables describe additional methods to add campaign members.

Adding Contacts to Campaigns

Contact Source	Recommended Campaign Member Tool	Maximum Number of Records
A report of existing contacts	Add Campaign Members from Reports	50,000 per report
A .csv file of existing contacts	Update Campaign Member Status	50,000 per import file
A list view of existing contacts	Adding Contacts or Leads from a List View to a Campaign	250 per list page

Adding Leads to Campaigns

Lead Source	Recommended Campaign Member Tool	Maximum Number of Records
A report of existing leads	Add Campaign Members from Reports	50,000 per report
A .csv file of new leads	Using the Data Import Wizard with Campaigns	50,000 per import file

Adding Leads to Campaigns

Lead Source	Recommended Campaign Member Tool	Maximum Number of Records
A list view of existing leads	Adding Contacts or Leads from a List View to a Campaign	250 per list page

SEE ALSO:

Campaigns FAQ

How can I calculate the ROI for my campaigns?

The Campaign ROI Analysis Report is located on the Reports tab in the Campaign Reports folder. It calculates your campaigns' performance by return on investment (ROI) and average cost. For each campaign in the report:

- ROI, which is expressed as a percentage, is calculated as the net gain (Total Value Won Opportunities - Actual Cost) divided by the Actual Cost.
- Total Value Won Opportunities is the calculated amount of all closed or won opportunities where the campaign is the Primary Campaign Source on the opportunity.

SEE ALSO:

Campaigns FAQ

How can I track which opportunities resulted from campaigns?

One key benefit of campaigns is the ability to track how much business has been generated from each campaign. When you create an opportunity, you can fill in the `Primary Campaign Source` field to indicate that the opportunity resulted from a specific campaign.

In addition, when you convert a lead that is linked to a campaign, that campaign is automatically inserted into the opportunity `Primary Campaign Source` field.

If a lead or contact is linked to multiple campaigns, the campaign with which he or she is most recently associated is inserted into the opportunity `Primary Campaign Source` field.

The Opportunities related list on a campaign shows every opportunity that is linked to that campaign. You can also run the Campaign Revenue Report to track which opportunities are linked to your campaigns.

SEE ALSO:

Campaigns FAQ

How does Primary Campaign Source work?

Primary Campaign Source is the campaign associated with a lead prior to lead conversion. This value can be manually changed in the lead detail. Additionally, it provides 100% of the amount revenue credit to the specified campaign.

SEE ALSO:

Campaigns FAQ

How is Campaign influence different from ROI reports?

Campaign influence tracks pipeline and revenue for multiple campaigns, and ties all campaigns of a contact role to that opportunity for pipeline and ROI reporting. This is especially helpful for longer deal cycles when more than one campaign contributes to a closed deal or a converted lead.

SEE ALSO:

Campaigns FAQ

Who has access to campaigns?

Depending on your sharing settings, users in your organization can view campaigns, view the advanced campaign setup, or run campaign reports. However, only designated Marketing Users with the appropriate user permissions can create, edit, and delete campaigns and configure advanced campaign setup. An administrator must select the `Marketing User` checkbox on a user's personal information to designate that user as a Marketing User.

In addition, Marketing Users can import leads and use the campaign import wizards if they also have the Marketing User profile (or the "Import Leads" permission and "Edit" on campaigns).

SEE ALSO:

Campaigns FAQ

Explore Your Organization's Territory Model

A territory model includes a hierarchy and a list view of parent and child territories. If you manage, administer, or belong to a sales territory, you should explore your territory model to understand how Sales efforts are organized. Drill down to get important details on individual territories, including assigned accounts.

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**. The list view displays your organization's active territory model. Click the model's label if you want to view its detail page. Along with other details, this page tells you the last time account assignment rules were run to realign the territory.
2. From the list view, click the model's **View Hierarchy** link.
3. Click **Tree View** to expand and explore the hierarchy tree.
4. Within the hierarchy, click a territory label to view its detail page, where you can identify its territory type, assigned users and their access levels, assignment rules, and more.
5. From the top of the page, navigate back to the model's territory hierarchy and check out its other territories.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view an active territory model:

- "View Setup and Configuration"

Identify an Account's Sales Territories

Find out which Sales territory an account belongs to.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Open the account record.
2. View the account's territories on the Territory Assignments related list.

SEE ALSO:

View a List of the Accounts in Your Territories

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To identify an account's sales territory:
- "Read" on accounts

View a List of the Accounts in Your Territories

Create a list view that shows you which accounts are assigned to the territories you cover.

Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

The `My Territories` filter shows accounts that belong to the territories you're assigned to. The `My Territory Teams` filter shows accounts for territories you're assigned to *and their descendant territories* (if any).

1. Click the Accounts tab and click **Edit** next to the view menu.
2. Give the view a name, then specify *`My Territories`* or *`My Territory Teams`* in the filter criteria. Add other filters if you need them.
3. Choose other fields you want to filter on, then select *`Account Name`* and any other fields you want the list view to show.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view territories in all of your organization's territory models:
- "Manage Territories"

To view territories in your organization's *`Active`* territory model:
- "View Setup and Configuration"

To view accounts:
- "Read" on Accounts

Managing Accounts by Territory

Territory Management

Territory management is an account sharing system that grants access to accounts based on the characteristics of the accounts. It enables your company to structure your Salesforce data and users the same way you structure your sales territories.

EDITIONS

Available in: Salesforce Classic

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

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management. 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.

Particularly if your organization has a private sharing model, you may need to grant users access to accounts based on criteria such as postal code, industry, revenue, or a custom field that is relevant to your business. You may also need to generate forecasts for these diverse categories of accounts. Territory management solves these business needs and provides a powerful solution for structuring your users, accounts, and their associated contacts, opportunities, and cases.

Note: Account ownership and its effect on record sharing remains valid and unchanged when territory management is in use.

Key benefits of territory management include:

- The ability to use account criteria to expand a private sharing model.
- Support for complex and frequently changed sales organization structures.
- Support for transferring users between territories, with the option to retain opportunities.
- Multiple forecasts per user, based on territory membership.
- Territory-based sales reports.

Note: Territory management only affects accounts and the standard objects that have a master-detail relationship to accounts. For example, opportunities are included in territory management but leads are not.

What Is a Territory?

A territory is a flexible collection of accounts and users where the users have at least read access to the accounts, regardless of who owns the account. By configuring territory settings, users in a territory can be granted read, read/write, or owner-like access (that is, the ability to view, edit, transfer, and delete records) to the accounts in that territory. Both accounts and users can exist in multiple territories. You can manually add accounts to territories, or you can define account assignment rules that assign accounts to territories for you.

You can also control users' access to the opportunities and cases associated with the accounts in the territory, regardless of who owns the records.

What Is a Territory Hierarchy?

Territories exist in a hierarchy which you can set up with as many nested levels as you wish. For example, you could create a top-level territory named "Worldwide Sales" that has the child territories "North America," "Europe/Middle East," "Latin America," "Africa," and "Asia/Australia." "North America" might have the child territories "Canada" and "United States." "United States" might have the child

territories "Western," "Central," "Southern," and "Eastern." Finally, "Western" might have the child territories "California," "Oregon," "Washington," "Nevada," "Arizona," and "Utah."

Territory hierarchies do not have to be focused on geography; they can be defined however you like.

How Do Territories Affect Forecasting?

When you enable territory management for your organization, the territory hierarchy also becomes the forecast hierarchy. Your forecast data is derived from the opportunities that are associated with the accounts in your territories. Users have a different forecast for each territory to which they are assigned. For example, if you are assigned to both "California" and "Arizona," you have a separate forecast for the opportunities you have in each of these territories." See Viewing Customizable Forecasts on page 348.

SEE ALSO:

Managing Territories

Territory Management FAQ

Managing Territories

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Managing your organization's territories involves the following tasks:

- Organize territories into hierarchies that represent your organization's forecasting requirements and how users work in your organization.
- Configure organization-wide settings for territory management.
- Create new territories and edit existing territories.
- Assign users to territories.
- Define account assignment rules that evaluate accounts and assign them to territories.
- Select accounts from lists and manually assign them to territories.

SEE ALSO:

Territory Management

Territory Management FAQ

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To manage territories:

- "Manage Territories"

  OR

  You are a forecast manager. Forecast managers can manage territories of those users working below them in territory hierarchy.

Assigning Opportunities to Territories

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

An opportunity can be assigned to a territory when the opportunity is created—either manually or during lead conversion—or when account assignment rules run that affect existing opportunities. This topic includes the following sections:

- Territory Assignment for Manually Created Opportunities
- Territory Assignment for Converted Leads
- Notes About Territory Assignment for Opportunities

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create opportunities:
- "Create" on Opportunities

Territory Assignment for Manually Created Opportunities

When an opportunity is created from the Opportunities tab or from the Quick Create area on the sidebar, Salesforce compares the territories associated with the opportunity's account to the territories that the opportunity owner is a member of:

- If there is a single territory that both the account and the opportunity owner belong to, the opportunity is assigned to that territory if "Evaluate this account against territory rules on save" is selected.
- If more than one territory is common to both the account and the opportunity owner, the opportunity is not automatically assigned to any territory. The opportunity owner must manually assign a territory to the opportunity.
- If no territory is common to both the account and the opportunity owner, the opportunity owner cannot assign the opportunity to a territory.

Territory Assignment for Converted Leads

When a lead is converted to an opportunity, that opportunity's territory assignment depends on several factors, including:

- Whether the account associated with the opportunity is assigned to one or more territories
- Whether the lead owner is a member of the same territory as the account
- The number of users assigned to a territory
- Whether a forecast manager is assigned to the 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:

Lead 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 and the lead owner becomes the opportunity owner.
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.

Lead Owner Belongs to Same Territory as Account	Number of Users Assigned to Territory	A Forecast Manager is Assigned to the Territory	Results
No	0	N/A	The opportunity is assigned to the same territory as the account and the lead owner becomes the opportunity owner. The lead owner is added as an inactive member of the territory.
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 and the lead owner becomes the opportunity owner.
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 lead owner becomes the opportunity owner. The lead owner is added as an inactive member of the territory.

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:

Lead Owner's Territory Membership	Results
Lead owner has one territory in common with the account	The opportunity is not assigned to any territories and the lead owner becomes the opportunity owner. The opportunity owner can assign the opportunity to the account's territory.
Lead owner has more than one territory in common with the account	The opportunity is not assigned to any territories and the lead owner becomes the opportunity owner. The opportunity owner can assign the opportunity to any territory that he or she has in common with the account.
Lead owner has no territories in common with the account	The opportunity is not assigned to any territories and the lead owner becomes the opportunity owner. The opportunity owner cannot assign the opportunity to any territories.

Notes About Territory Assignment for Opportunities

- The following actions do not change an opportunity's territory:
  - Manually assigning the opportunity's account to a territory

  - Changing which account is associated with the opportunity
  - Changing the account's territory as a result of account assignment rules if the opportunity and its account are in different territories
  - Transferring the opportunity to a new owner
- Territory assignment rules do not update an opportunity if the opportunity's `Close Date` is before the current date and the opportunity's `Stage` is *`Closed Won`* or *`Closed Lost`*.
- When an opportunity is not automatically assigned to a territory, we recommend that users be notified if the opportunity is not assigned to a territory manually within one day. You can set up time-based workflow to notify users about unassigned opportunities.
- 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.
- When opportunities are transferred from one user to another, whether individually or as a group, the territory assignment on the opportunities is unaffected. However, if the opportunities are assigned to a user who is not already a member of the opportunity's territory, that user is added as an inactive member of the territory.
- When users are removed from a territory, you can specify who should receive their open opportunities. Also, when users are transferred from one territory to another, you can specify which opportunities the users should continue to own and select a recipient for any remaining opportunities. If you do not specify a recipient:
  - If the parent territory has a forecast manager, the forecast manager takes ownership of the user's open opportunities. The forecast manager is assigned to the territory and `Active in Territory` is unchecked.
  - If the parent territory does not have a forecast manager, the user remains in the territory and `Active in Territory` is unchecked.

Viewing Manually Assigned Accounts Lists

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

The manually assigned accounts list page displays a list of accounts assigned to the selected territory. From this page, you can view detailed account information, remove accounts from 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.
- Click an account name to view the account detail.
- Click **Remove** next to an account name to remove the account from the territory.

SEE ALSO:

Territory Management

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view manually assigned account lists:

- "View Setup and Configuration"

To remove accounts:

- "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.

Managing Accounts by Territory FAQs

Territory Management FAQ

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

- How does Salesforce handle territory management?
- Are opportunities transferred to different users when account assignment rules are run?
- Are the territory hierarchy and the role hierarchy different?
- How are opportunities assigned to territories?
- How do manually assigned accounts differ from those assigned by account assignment rules?
- How does opportunity confinement work?
- Must I be assigned to the same territories as the opportunities I own?

EDITIONS

Available in: Salesforce Classic

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

- What happens when I undelete an account or opportunity that was assigned to a territory?
- What kinds of records have territories?
- When do account assignment rules evaluate accounts?

SEE ALSO:

Territory Management

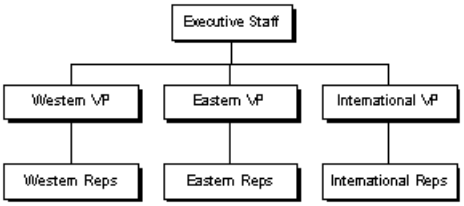
How does Salesforce handle territory management?

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

In Enterprise, Unlimited, Performance, and Developer Edition organizations, you can enable territory management to organize your users into territories and provide access to accounts and their related opportunities and cases.

In Professional Edition organizations, Salesforce's role hierarchy allows you to manage the roll-up of information among your company's territories. The hierarchy structure is not based on traditional titles, but rather on a hierarchy of roles. Multiple people with different titles can be assigned to the same role. Users always have access to the data that is owned by or shared with users assigned to roles below them in the hierarchy. A user's role also determines which data is accessible to him or her in forecasts.

A typical organization may have three levels of roles, for example:



- The top role may include your VPs of sales, marketing, and client services, and your CFO. These users will be able to view all information at lower levels and perform roll-ups on that information.
- The middle level may include various vice president or regional managers. These roles can access the data owned by or shared with all users below them in the hierarchy. For example, the Western VP role can view and perform roll-ups of the information owned by users in the Western Reps role.
- Since no roles are below the various Reps roles, the users in those roles cannot perform any roll-ups or view anyone's information except their own.

Note: Your role hierarchy interacts with your organization's sharing model to determine exactly what information a user can see, given the sharing setting is selected to use hierarchies. For forecasts, a user's role always determines which information he or she can view, regardless of the sharing model. Likewise, in a Private sharing model, a user's role determines his or her access to other users' data. However, in a Public Read/Write or Public Read Only organization, users can view (and edit, for Public Read/Write) information of all other users, in addition to having access to the data of users below them in the hierarchy.

SEE ALSO:

Territory Management FAQ

Territory Management

Are opportunities transferred to different users when account assignment rules are run?

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

When account assignment rules cause an opportunity to be reassigned to a territory to which you already belong, you automatically become the owner of that opportunity when you meet any of the following criteria:

- You are the only member of the territory.
- You are the only forecast manager in the territory.
- You are the only territory member enabled for forecasting.

If none of these criteria are met, the original opportunity owner is added to the territory as an inactive member.

SEE ALSO:

Territory Management FAQ

Are the territory hierarchy and the role hierarchy different?

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Yes. The territory hierarchy and the role hierarchy are independent. See the following comparison:

Territory Hierarchy	Role Hierarchy
Is available by contacting Salesforce	Is available by default
Determines forecasts	Has no impact on forecasting when territory management is enabled
Supports assigning a user to multiple territories	Supports assigning a user to only one role
Affects account and opportunity reports	Affects all other reports
Grants access to records regardless of ownership. Users receive whatever access is most permissive across both hierarchies.	Grants access to records based on ownership. Users receive whatever access is most permissive across both hierarchies.

SEE ALSO:

Territory Management FAQ

How are opportunities assigned to territories?

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Opportunities are automatically assigned to territories based on the following actions.

- Creating a new opportunity
- Running account assignment rules

  When account assignment rules are run, opportunities are automatically assigned to the same territory as the account when:

  - An opportunity does not have a territory and its account is added to a territory.
  - An account moves from one territory to another. However, if an account assignment rule prohibits opportunities from moving outside a given part of the territory hierarchy, the opportunities do not move and no longer belong to any territories.

  Opportunities are not automatically assigned to the same territory as the account when:

  - An account is removed from a territory and not reassigned to a new territory in the same operation. The account's opportunities from the original territory no longer belong to any territories.

- An account is reassigned to multiple territories in one operation. The account's opportunities from the original territory no longer belong to any territories, unless the `Confine Opportunity Assignment` checkbox is checked.

Note: If the opportunity owner is not part of the new territory, he or she is added as an inactive member of the territory.

The following actions do not change an opportunity's territory.

- Manually assigning the opportunity's account to a territory
- Changing which account is associated with the opportunity
- Changing the account's territory as a result of account assignment rules if the opportunity and its account are in different territories
- Transferring the opportunity to a new owner.

SEE ALSO:

Territory Management FAQ

How do manually assigned accounts differ from those assigned by account assignment rules?

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Manually assigned accounts are not evaluated when running account assignment rules. After they have been manually assigned to a territory, they remain there until they are manually removed from the territory.

SEE ALSO:

Territory Management FAQ

How does opportunity confinement work?

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

If the `Confine Opportunity Assignment` checkbox is selected for a territory, 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.

SEE ALSO:

Territory Management FAQ

Must I be assigned to the same territories as the opportunities I own?

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

When an open opportunity is assigned to you and you do not belong to that opportunity's territory, you are assigned to the territory with `Active in Territory` unchecked in the Assigned Users related list of the territory.

SEE ALSO:

Territory Management FAQ

What happens when I undelete an account or opportunity that was assigned to a territory?

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Undeleting an account or opportunity restores the territory assignment, but 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 not consistent with the new rules.

SEE ALSO:

Territory Management FAQ

What kinds of records have territories?

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Accounts, opportunities, and users have territory fields. Accounts and users can be associated with multiple territories. An opportunity can be associated with only one territory.

SEE ALSO:

Territory Management FAQ

When do account assignment rules evaluate accounts?

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

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.

SEE ALSO:

Territory Management FAQ

Tracking Potential Opportunities as Leads

Leads

Track prospects apart from your contacts and opportunities with Salesforce lead records. After you've qualified your lead records, convert them to contacts and create accounts for them (if you don't already have the accounts in Salesforce). And hopefully, create opportunities to bolster your pipeline.

Regardless of whether you're working in Lightning Experience or Salesforce Classic, you work with a list of leads. From the list, you quickly create, locate, and work with the leads you're focusing on at the moment.

Associate relevant events and tasks with those leads. And convert your qualified leads to contacts that have opportunities associated to them. For any lead records that you mark Unqualified, plan to revisit them later to see whether those prospects' needs for your products and services changed.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

SEE ALSO:

Convert Qualified Leads

Manage Email and Templates in Lightning Experience

Manage Work and View Past Activity in Lightning Experience

Guidelines for Creating Leads

Get some guidance when you manually create leads to track your prospects.

- From the Leads tab in Salesforce Classic, you can automatically assign the lead using the active lead assignment rule. To do so, select `Assign using active assignment rules`. Otherwise, the lead belongs to you.

  If you automatically assign the new lead, the record type of the lead can change, depending on the behavior your administrator specified for assignment rules.
- If your sales team uses divisions, the division of a new lead is automatically set to your default division, unless you manually select a different one.
- Your administrator determines the default lead status for new leads.
- The lead is marked as "Read", and doesn't appear in the My Unread Leads list view. But in Salesforce Classic, if you save the lead by clicking **Save & New**, the lead is marked as "Unread."

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Leads Home

Clicking on the Leads tab displays the leads home page.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view Leads tab:
- "Read" on leads

To view leads:
- "Read" on leads

To create leads:
- "Create" on leads

- In the **Lead Views** section, select a list view from the drop-down list to go directly to that list page, or click **Create New View** to define your own custom view.

  To view the leads in a queue, choose that queue list from the drop-down list. For every queue your administrator creates, Salesforce adds a corresponding queue list view.

  Note: The organization-wide sharing model for an object determines the access users have to that object's records in queues:

  Public Read/Write/Transfer
  Users can view and take ownership of records from any queue.

  Public Read/Write or Public Read Only
  Users can view any queue but only take ownership of records from queues of which they are a member or, depending on sharing settings, if they are higher in the role or territory hierarchy than a queue member.

  Private
  Users can only view and accept records from queues of which they are a member or, depending on sharing settings, if they are higher in the role or territory hierarchy than a queue member.

  Regardless of the sharing model, users must have the "Edit" permission to take ownership of records in queues of which they are a member. Administrators, users with the "Modify All" object-level permission for Cases, and users with the "Modify All Data" permission, can view and take records from any queue regardless of the sharing model or their membership in the queue.

- In the **Recent Leads** section, select an item from the drop-down list to display a brief list of the top leads matching that criteria. From the list, you can click any lead name to go directly to the lead detail. Toggle the **Show 25 items** and **Show 10 items** links to change the number of items that display. The fields you see are determined by the "Leads Tab" search layout defined by your administrator and by your field-level security settings (available in Enterprise, Unlimited, Performance, and Developer Editions only). The Recent Leads choices are:

Recent Leads Choice	Description
My Unread Leads	The last ten or twenty-five leads assigned to you which you have not yet viewed or edited. This list only includes records owned by you.
Recently Viewed	The last ten or twenty-five leads you viewed, with the most recently viewed lead listed first. This list is derived from your recent items and includes records owned by you and other users.
Recently Created	The last ten or twenty-five leads you created, with the most recently created lead listed first. This list only includes records owned by you.

- If Quick Create has been enabled by your administrator, you can add a new lead from the **Quick Create** area in the sidebar on the leads homepage. Alternatively, click **New** next to the **Recent Leads** section to create a new lead.

- Under **Reports**, click any report name to jump to that report.
- In the **Summary** section, choose values and click **Run Report** to view a summary list of your leads.
- Select any of the links under **Tools** to manage your leads.
- If leads are shared with external contacts via Salesforce to Salesforce, choose one of the list views under **Leads from Connections** to view leads that your business partners have shared with you.

SEE ALSO:

Leads

Social Accounts, Contacts, and Leads

Reassign Leads

Grab leads from a queue or reassign your leads to colleagues.

To reassign leads from a list view or queue, select the leads you want to reassign, and change the owner. If you want to reassign a bunch of leads, from Setup, enter `Mass Transfer Records` in the Quick Find box, then select **Mass Transfer Records**.

SEE ALSO:

Leads

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To change or accept ownership of leads from a queue:

- "Edit" on leads

To mass transfer leads:

- "Edit" on leads

  AND

  "Transfer Record" or "Transfer Leads"

Lead Fields

A lead has the following fields, listed in alphabetical order. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

If the lead record was added from Data.com, certain fields, as identified here, will be populated with the Data.com or Dun & Bradstreet (D&B) value, if a value is available. Some Data.com lead fields are available only to organizations that use a specific Data.com product.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description	Accepts Data.com or D&B Value
Address	Street address for the lead, for example, 475 Boardwalk Ave. Up to 255 characters are allowed in this field.	✔ (Data.com)
Annual Revenue	Amount of annual revenue at lead's company.	✔ (D&B)
Campaign	Name of the campaign responsible for generating the lead. Displays only when creating a new lead. Data entered in this field is stored in the Campaign History related list on the lead.	
City	City portion of the lead's address, for example, San Francisco. Up to 40 characters are allowed in this field.	✔ (Data.com)
Clean Status	The record's clean status, as compared with Data.com. Values are Not Compared, In Sync, Reviewed, Different, Not Found, and Inactive. This field is available if you use Data.com Prospector or Data.com Clean.	✔ (Data.com)
Company	Name of company with which lead is affiliated. Up to 255 characters are allowed in this field.	✔ (D&B)
Company D-U-N-S Number	Data Universal Numbering System (D-U-N-S) number is a unique, nine-digit number assigned to every business location in the D&B 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. This field is available if you use Data.com Prospector or Data.com Clean. Note: To see the entire D-U-N-S number, either • Add the lead to Salesforce if you haven't yet, or • Clean the lead with Data.com if it already exists in Salesforce Until you add or clean the record, its first five digits will be masked with asterisks (*).	✔ (D&B)
Company Name (Local)	Name of the company in the local language.	
Country	Country portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	
Created By	User who created the lead, including creation date and time. (Read only)	
D&B Company	A link to the corresponding D&B Company record, which displays Dun & Bradstreet (D&B) fields for the lead. Use the lookup if you need to associate a different D&B Company record with the lead. This field is only available to organizations that use Data.com Premium Prospector or Data.com Premium Clean.	✔ (D&B)
Data.com Key	The company's ID in Data.com. When Salesforce records are compared with Data.com records (via manual cleaning or automated clean jobs),	✔ (Data.com)

Field	Description	Accepts Data.com or D&B Value
	if Data.com finds a match, the two records are linked by this field's numeric value.	
`Description`	Description of the lead. Up to 32KB of data are allowed in this field. Only the first 255 characters appear in reports.	
`Do Not Call`	Whether the contact wants to be contacted by phone. If you use Data.com, the `Phone` field value is hidden from search results and on the Contact Card, and it's blank in `.csv` files that are created when you export records.	
`Email`	Email address of lead. Must be a valid email address in the form: jsmith@acme.com. Up to 80 characters are allowed in this field. Click the email address in this field to send an email using your personal email application. If the Gmail Buttons and Links feature is enabled, you can click the Gmail link next to the field to send an email from your Gmail account. See Using Gmail in Salesforce for more information.	✔ (Data.com)
`Email Opt Out`	Whether the contact wants to receive email. If you use Data.com, the `Email` field value is hidden from search results and on the Contact Card, and it's blank in `.csv` files that are created when you export records.	
`Fax`	Lead's fax number. Up to 40 characters are allowed in this field.	
`Fax Opt Out`	Lead has not requested to be included in broadcast faxes.	
`First Name`	First name of the lead, as displayed on the lead edit page. Up to 40 characters are allowed in this field.	✔ (Data.com)
`First Name (Local)`	First name of the lead translated into the local language.	
`Industry`	Primary business of lead's company. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	✔ (Data.com)
`Last Name`	Last name of the lead, as displayed on the lead edit page. Up to 80 characters are allowed in this field.	✔ (Data.com)
`Last Name (Local)`	Last name of the lead translated into the local language.	
`Last Transfer Date`	The date the lead owner was last changed.	
`Lead Currency`	The default currency for all currency amount fields in the lead. Amounts display in the lead currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.	
`Lead Division`	Division to which the lead belongs. Available only in organizations that use divisions to segment their data.	
`Lead Owner`	Assigned owner of the lead.	

Field	Description	Accepts Data.com or D&B Value
Lead Record Type	Name of the field that determines what picklist values are available for the record. The record type may be associated with a lead process. Available in Enterprise, Unlimited, Performance, and Developer Editions.	
Lead Source	Source of lead, for example, Advertisement, Partner, or Web. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	✔ (Data.com)
Lead Status	Status of the lead, for example, Open, Contacted, Qualified. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Middle Name	Middle name of the lead, as displayed on the lead edit page. Up to 40 characters are allowed for this field. Note: To enable this field, contact Salesforce Customer Support. Next, from Setup, enter *User Interface* in the Quick Find box, then select **User Interface**. Then select Enable Name Suffixes for Person Names.	
Middle Name (Local)	Middle name of the lead translated into the local language. Note: To enable this field, contact Salesforce Customer Support. Next, from Setup, enter *User Interface* in the Quick Find box, then select **User Interface**. Then select Enable Name Suffixes for Person Names.	
Mobile	Cellular or mobile phone number. Up to 40 characters are allowed in this field.	
Modified By	User who last changed the lead fields, including modification date and time. This does not track changes made to any of the related list items on the lead. (Read only)	
Name	Combined first name, middle name (beta), last name, and suffix (beta) of lead, as displayed on lead detail page.	✔ (Data.com)
No. of Employees	Number of employees at the lead's company.	✔ (D&B)
Phone	Lead's primary phone number. Up to 40 characters are allowed in this field.	✔ (Data.com)
Partner Account	Read-only field that indicates the lead is owned by a partner user.	
Rating	Indicates value or prospect of the lead, for example, Hot, Warm, Cold. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Read	Flag indicating that the lead has been viewed or edited by the lead owner. Flag is not displayed on lead edit or detail pages. Leads marked as "Read" do not contain a check mark in the Unread column on leads list views.	

Field	Description	Accepts Data.com or D&B Value
`Salutation`	Title for addressing the lead, for example, Mr., Ms., Dr., or Prof. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
`State/Province`	State or province portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	
`Suffix`	Name suffix of the lead, as displayed on the lead edit page. Up to 40 characters are allowed for this field. Note: To enable this field, contact Salesforce Customer Support. Next, from Setup, enter *`User Interface`* in the `Quick Find` box, then select **User Interface**. Then select `Enable Name Suffixes for Person Names`.	
`Title`	Position of lead within his or her company. Up to 80 characters are allowed in this field.	✔ (Data.com)
`Unread`	Flag indicating that the lead has not been viewed or edited by the lead owner. Flag is not displayed on lead edit or detail pages. Leads marked as "Unread" contain a check mark in the Unread column on leads list views.	
`Custom Links`	Listing of custom links for leads as set up by your administrator.	
`Website`	URL of company's website, for example, www.acme.com. Up to 255 characters are allowed in this field; only the first 50 are displayed.	
`ZIP`	ZIP code or postal code portion of the lead's address. Up to 20 characters are allowed in this field.	✔ (Data.com)

SEE ALSO:

Lead Conversion Mapping

Convert Qualified Leads

Keep the sales process moving when you qualify a lead and then convert it to a contact. Relate that contact to either an existing account in Salesforce, or an account that you create. And if the lead you're converting results in a deal that looks promising, create an opportunity record at the same time.

Keep in mind that you can't reverse lead conversion. When you convert leads to contacts, the process sometimes creates duplicate records. If so, we tell you. How these duplicate records are handled depends on how your administrator has set up Apex Lead Convert and Duplicate Management. For example, your administrator can require that you resolve the duplicates before you finish converting.

1. After you choose to convert the lead record, select an existing account or enter an account name for the one you're creating.
2. *Salesforce Classic only:* If you update a person account, select the option to overwrite the lead source in the person account with the value from the lead.
3. If you want to create an opportunity record, give it name.
4. Convert the lead.

SEE ALSO:

Considerations for Converting Leads

Lead Conversion Mapping

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To convert leads:

- "Create" and "Edit" on leads, accounts, contacts, and opportunities

  AND

  "Convert Leads"

  AND

  "Read" on any related campaigns

To avoid creating duplicate records when converting leads:

- "Require Validation for Converted Leads"

Considerations for Converting Leads

Learn what happens to qualified leads when you convert them to accounts, contacts, and opportunities.

When you convert qualified leads, Salesforce moves any campaign members to the new contacts, and the leads become read-only records. If existing accounts and contacts share the same names as those specified on the leads, you can choose to update the existing accounts and contacts. Salesforce adds information from the lead into empty fields; Salesforce does not overwrite existing account and contact data.

All open and closed activities from the leads are attached to the accounts, contacts, and opportunities. You can assign the owner of the records, and schedule follow-up tasks. When you assign new owners, only the open activities are assigned to the new owner. If you have custom lead fields, that information can be inserted into custom account, contact, or opportunity fields. You can't view converted leads, but they appear in lead reports. Salesforce updates the `Last Modified Date` and `Last Modified By` system fields on converted leads when picklist values included on converted leads are changed.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Campaigns	If the lead matches an existing contact and both records are linked to the same campaign, the campaign member status is determined by whichever is further along in the lifecycle of the campaign. For example, if the lead member status is "sent" and the contact member status is "responded," the responded value is applied to the contact. Related campaign information is always associated with the new contact record, regardless of the user's sharing access to the campaign. When more than one campaign is associated with a lead, the most recently associated campaign is applied to the `Primary Campaign Source` field on the opportunity, regardless of the user's sharing access to the campaign.
Chatter	When you convert a lead to an existing account, you don't automatically follow that account. However, when you convert the lead to a new account, you automatically follow the new account, unless you disabled feed tracking for accounts in your Chatter settings.
Data.com / D&B Company	If you use Data.com Premium, when you add a lead from Data.com, a corresponding D&B Company record (if one exists in Data.com) is automatically created in Salesforce and linked to the lead record via its `D&B Company` field. If you later convert that lead: • And if the account is created from the conversion, the lead's `Company D-U-N-S Number` field value transfers to the account's `D-U-N-S Number` field, and the lead's `D&B Company` field value transfers to the account's `D&B Company` field. • Its `Data.com Key` field value transfers to the contact's `Data.com Key` field. If you use Data.com Corporate, no D&B Company record is created, but the lead's `Data.com Key` field value transfers to the contact's `Data.com Key` field.
Divisions	The new account, contact, and opportunity are assigned to the same division as the lead. If you update an existing account during lead conversion, the account's division is not changed, and the new contact and opportunity inherit the account's division.
Duplicate Management	When you convert leads to contacts, the process sometimes creates duplicate records. If so, we tell you. How these duplicate records are handled depends on how your administrator has set up Apex Lead Convert and Duplicate Management. For example, your administrator can require that you resolve the duplicates before you finish converting.
Enterprise Territory Management	Filter-based opportunity territory assignment is not triggered when an opportunity is created through lead conversion.
Existing Contact	When you update an existing contact with a lead that you are converting, lead information in multi-select picklist fields carries over to the existing contact only if the matching fields for the contact are blank.
Local Lead Names	`Company Name (Local)` on the lead automatically maps to `Account Name (Local)`, along with their associated standard name fields.
Person Accounts	With person accounts enabled, you can convert leads to either person accounts or business accounts. Leads that don't have a value in the `Company` field are converted to person accounts. Leads that do have a value in the `Company` field are converted to business account. We recommend you use different lead record types and page layouts to differentiate leads that will convert to person accounts from those that will convert to business accounts. Specifically, remove the `Company` field from the page layouts for leads that will convert to person accounts. Then, make the `Company` field required on the page layouts for leads that will convert to business accounts.

	If you convert a lead and attach it to a person account that someone else owns, that person account owner becomes the contact owner. If you convert a lead that someone else owns and attach it to a person account that you own, the lead owner becomes the contact owner.
Record Types	If the lead has a record type, the default record type of the user converting the lead is assigned to records created during lead conversion. The default record type of the user converting the lead determines the lead source values available during conversion. If the desired lead source values are not available, add the values to the default record type of the user converting the lead.
Standard and Custom Lead Fields	The system automatically maps standard lead fields to standard account, contact, and opportunity fields. For custom lead fields, your administrator can specify how they map to custom account, contact, and opportunity fields. The system assigns the default picklist values for the account, contact, and opportunity when mapping standard lead picklist fields that are blank. If your organization uses record types, blank values are replaced with the default picklist values of the new record owner.
Territory Management	If your organization uses territory management, the new account is evaluated by account assignment rules and may be assigned to one or more territories. If the rules assign the account to exactly one territory, then the opportunity will also be assigned to that territory. If the rules assign the account to multiple territories, then the opportunity is not assigned to any territory.
Triggers	During lead conversion, Apex triggers are fired, and universally required custom fields and validation rules are enforced, only if validation and triggers for lead convert are enabled in your organization. Salesforce ignores lookup filters when converting leads if the `Enforce Validation and Triggers from Lead Convert` checkbox on the Lead Settings page is deselected.
Workflow	You can't convert a lead that's associated with an active approval process or has pending workflow actions. Converting a lead to a person account won't trigger workflow rules. When a lead is converted by someone who isn't the lead owner, all workflow tasks associated with the lead that are assigned to that user, except email alerts, are reassigned to the lead owner. Workflow tasks assigned to users other than the lead owner and lead converter aren't changed. If validation and triggers for lead convert are enabled, then converting a lead can trigger a workflow action on a lead. For example, if there's an active workflow rule that either updates a lead field or transfers the owner of a lead, that rule can trigger when the lead is converted, even if the lead isn't visible on the Leads tab as a result of the conversion. If a workflow rule creates a new task as a result of a lead conversion, the task is assigned to the newly created contact and related to the associated account or opportunity.

SEE ALSO:

Convert Qualified Leads

Lead Conversion Mapping

Learn which fields from the lead records you convert map to fields in your newly created contact, account, and opportunity records.

When you convert lead records, standard lead fields automatically map to contact, account, and opportunity fields. If you have custom fields, your administrator specifies the fields to which they map in your newly created contact, account, and opportunity records.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Lead Field	Maps to
Address	Account: Billing Address Contact: Mailing Address
Annual Revenue	Account: Annual Revenue
Campaign	Opportunity: Primary Campaign Source For leads associated with multiple campaigns, Salesforce adds the most recently associated campaign to the opportunity, even if the sales rep can't access that campaign.
Company	Account: Account Name Contact: Account Opportunity: Account Name Opportunity: Opportunity Name
Company Name (Local)	Account: Account Name (Local)
Description	Contact: Description
Do Not Call	Contact: Do Not Call This field is not updated for leads converted to existing contacts.
Email	Contact: Email
Email Opt Out	Contact: Email Opt Out This field is not updated for leads converted to existing contacts.
Fax	Account: Fax Contact: Fax
Fax Opt Out	Contact: Fax Opt Out
First Name	Contact: First Name
First Name (Local)	Contact: First Name (Local)

Lead Field	Maps to
Industry	Account: Industry
Last Name	Contact: Last Name
Last Name (Local)	Contact: Last Name (Local)
Lead Owner	Account: Owner Contact: Owner Opportunity: Owner
Lead Source	Contact: Lead Source Opportunity: Lead Source
Mobile	Contact: Mobile
No. of Employees	Account: Employees
Partner Account	Opportunity: Partner Account This field is not updated for leads converted to existing opportunities.
Phone	Account: Phone Contact: Phone
Rating	Account: Rating
Title	Contact: Title
Website	Account: Website

Opportunity Close Dates

During the lead conversion process, Salesforce automatically assigns close dates for the opportunities you create depending on the fiscal year settings in Salesforce.

If the fiscal year in Salesforce is	Salesforce assigns close dates for opportunities to
Standard	The last day of the current fiscal quarter.
Custom	The last day of the current fiscal period. If a fiscal year has not been defined for the current date, the close date is the end of the current calendar quarter.

SEE ALSO:

Convert Qualified Leads

Considerations for Converting Leads

Lead Sharing in Salesforce Classic

Extend sharing privileges beyond the basic sharing model for your own data on a lead-by-lead basis.

Your administrator defines the sharing model for your company. And if that sharing model for leads is Private or Public Read Only, you can use lead sharing to increase access to your leads. You cannot, however, restrict access beyond your company's default access levels.

You can see sharing details when you click **Sharing** on the lead detail page.

EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

Leads

Merging Duplicate Leads

To merge duplicate leads:

1. Select a lead record.
2. Click **Find Duplicates**.
3. Select up to three leads in the matching leads list that you want to merge.

   Optionally, enter a new lead name or company and click **Search** to find another lead to merge. Salesforce performs a phrase search for matches in the `Name` and `Company` fields. It also considers an implied wildcard after any entry. Search results include matches for any fields you enter, so if you enter *Bob Jones* who works at *Acme*, search results include anyone named *Bob Jones* at any company and any lead with *Acme* as a company.
4. Click **Merge Leads**.

   Tip: Click **Convert Lead** to quickly convert the selected lead into an existing account, opportunity, and contact.
5. Select one lead as the "Master Record." Any data in hidden or read-only fields will be taken from the Master Record. However, administrators and users with the "Edit Read Only Fields" permission can manually select which read-only fields to retain. Note that hidden fields are not displayed during the merge.
6. Select the fields that you want to retain from each record.

   When there is conflicting data, the fields in the left column are preselected and the row is marked.
7. Click the **Merge** button to complete the merge.
8. Click **OK** to confirm.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view leads:
- "Read" on leads

To merge leads:
- "Delete" on leads

SEE ALSO:

Merge Duplicate Contacts

Merging Duplicate Accounts

Considerations for Deleting Leads

Know what happens to the records associated with the leads you delete.

When you delete a lead, the lead record moves to the Recycle Bin. Associated notes, attachments, and activities are deleted along with the lead. If you restore the lead, any associated notes, attachments, and activities are also restored.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Tracking Potential Opportunities as Leads FAQs

Leads FAQ

- What is a Lead?
- What are the advantages of using leads?
- Can I convert existing accounts or contacts into leads?
- How many leads can we capture from our website?
- What if my company reaches the limit for web-generated leads?
- How do I specify which information to capture online?
- Can I capture leads from multiple web pages?
- How can our webmaster test the Web-to-Lead page?
- Who owns new web-generated leads?
- What status is assigned to web-generated leads?
- How can I be sure that leads won't be lost?
- How can I tell which of my leads are new?
- What happens when I convert leads?
- How are lead fields mapped to other fields during conversion?

EDITIONS

Available in: Salesforce Classic

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

What is a Lead?

Leads are people who are interested in your product and service. Converting leads to loyal customers will provide success within a business. By managing your leads in a systematic and structured way, you can increase both the numbers of leads you generate and how many leads you convert.

SEE ALSO:

Leads FAQ

What are the advantages of using leads?

Using leads allows your company to maintain two separate lists - one for prospective customers and one for existing customers. You can store your prospects as leads, and then once a lead becomes qualified, you can convert it to an account, contact, and, optionally, an opportunity.

Leads are especially useful if your company has two separate teams - one that handles lead generation and mass marketing and one that handles sales. The lead generation team can concentrate their work on the Leads tab, and the opportunity team can use the Account, Contact, and Opportunity tabs.

SEE ALSO:

Leads FAQ

Can I convert existing accounts or contacts into leads?

No. As an alternative, create an opportunity for the account or contact. If you prefer to use a lead, create a report containing the accounts or contacts you want to convert into leads, export them, and then import them as leads.

SEE ALSO:

Leads FAQ

How many leads can we capture from our website?

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, you can capture up to 500 leads in a 24–hour period. If your company regularly exceeds the Web-to-Lead limit, click **Help & Training** at the top of any page and select the My Cases tab to submit a request for a higher limit directly to Salesforce.

When your organization reaches the 24–hour limit, Salesforce stores additional requests in a pending request queue that contains both Web-to-Case and Web-to-Lead requests. The requests are submitted when the limit refreshes. The pending request queue has a limit of 50,000 combined requests. If your organization reaches the pending request limit, additional requests are rejected and not queued. Your administrator receives email notifications for the first five rejected submissions. Contact Salesforce Customer Support to change your organization's pending request limit.

SEE ALSO:

Leads FAQ

What if my company reaches the limit for web-generated leads?

The daily limit for Web-to-Lead requests is 500. If your company generates more leads than the maximum allowed, the Default Lead Creator (specified in the Web-to-Lead setup page) will receive an email containing the captured information. Contact Customer Support if your company would like to generate over 500 Web-to-Lead requests per day.

SEE ALSO:

Leads FAQ

How do I specify which information to capture online?

When you generate the HTML for your company's website, you can choose which standard or custom lead fields for which you want to gather information. You must create the custom lead fields prior to generating the HTML code. From Setup, enter *`Web-to-Lead`* in the `Quick Find` box, then select **Web-to-Lead** to set up this feature and generate the necessary HTML.

SEE ALSO:

Leads FAQ

Can I capture leads from multiple web pages?

Yes. Insert the generated HTML code into the web pages from which you want to capture leads. Whenever someone submits information on any of those web pages, a lead will be created.

SEE ALSO:

Leads FAQ

How can our webmaster test the Web-to-Lead page?

Add the following line to your Web-to-Lead page code if you want to see a debugging page when you submit the form. Don't forget to remove this line before releasing the Web-to-Lead page on your website.

```
<input type="hidden" name="debug" value="1">
```

SEE ALSO:

Leads FAQ

Who owns new web-generated leads?

Your administrator can create a lead assignment rule to determine how web leads will be automatically assigned to different users or queues. In addition, your administrator must customize the Lead Settings to specify a Default Lead Owner to whom all web leads will be assigned if the assignment rule fails to locate an owner. If you do not use assignment rules, all web leads will be assigned to the Default Lead Creator (specified in the Web-to-Lead setup).

SEE ALSO:

Leads FAQ

What status is assigned to web-generated leads?

All new web leads are marked with a status equal to the "default status" that your administrator selects when editing the `Lead Status` picklist values. In addition, web-generated leads are marked with the "Unread" flag; they have a check mark in the Unread column on the lead list views. When a user views or edits a new web lead, the lead is automatically set to "Read." This way you can easily locate all new leads using the My Unread Leads list view.

SEE ALSO:

Leads FAQ

How can I be sure that leads won't be lost?

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.

If a new lead cannot be generated due to errors in your Web-to-Lead setup, Customer Support is notified so that we can assist you in correcting it.

Salesforce ensures that your leads won't be lost if they are submitted during a scheduled Salesforce downtime.

SEE ALSO:

Leads FAQ

How can I tell which of my leads are new?

When a lead is assigned to you, either manually transferred, imported, or generated from the web, the lead is marked as "Unread," that is, it has a check mark in the Unread column on leads list views. To view your new leads, select the My Unread Leads list view on the Leads tab. When you view or edit an "Unread" lead, it is automatically marked as "Read."

SEE ALSO:

Leads FAQ

What happens when I convert leads?

When you convert leads, Salesforce creates new accounts, contacts, and, opportunities using information from the leads you're converting. Salesforce moves any campaign members to the new contacts, and the leads become read-only records. If existing accounts and contacts share the same names as those specified on the leads, you can choose to update the existing accounts and contacts. Salesforce adds information from the lead into empty fields; Salesforce does not overwrite existing account and contact data.

All open and closed activities from the leads are attached to the accounts, contacts, and opportunities. You can assign the owner of the records, and schedule follow-up tasks. When you assign new owners, only the open activities are assigned to the new owner. If you have custom lead fields, that information can be inserted into custom account, contact, or opportunity fields. You can't view converted leads, but they appear in lead reports. Salesforce updates the `Last Modified Date` and `Last Modified By` system fields on converted leads when picklist values included on converted leads are changed.

SEE ALSO:

Leads FAQ

How are lead fields mapped to other fields during conversion?

When you convert a lead, data in standard lead fields is transferred into standard account, contact, and opportunity fields. For custom lead fields, the data is mapped to custom account, contact, and opportunity fields as specified by your administrator.

Any standard lead picklist fields that are blank automatically inherit the default picklist value for accounts, contacts, and opportunities. If your organization uses record types, all records created during lead conversion adopt the default record type for the owner of the newly-created account, contact, and opportunity.

SEE ALSO:

Leads FAQ

Can I automatically email leads that come from my website?

Yes. You can create auto-response rules that will email these prospects using templates that vary based on criteria you set up.

SEE ALSO:

Leads FAQ

Why can't I see the **Sharing** button on a record?

The **Sharing** button lets users grant other users access to a record beyond the organization-wide defaults or sharing rules. You can easily remove this access after it's no longer needed.

You have access to the **Sharing** button when your sharing model is either Private or Public Read Only for a type of record or related record. For example, the **Sharing** button may appear on an account even though your organization-wide default for accounts is Public Read/Write, if your organization-wide default for related opportunities is Public Read Only.

When the button is available on the page layout, administrators see the button on all records. Non-administrators see this button on records that only they own.

Managing Activities, Opportunities, and Products

Plan and Track Meetings and Tasks

Activities

Events and tasks are the engine of sales productivity. With Salesforce, you can be prepared for any meeting and know which task is your highest priority right now. Track meetings and tasks together in lists and reports to keep your finger on the pulse of all your leads, contacts, opportunities, accounts, and campaigns. Events and tasks also serve historical reporting purposes in Salesforce. Whether you're a manager delegating tasks, part of a sales team, or a sales rep who closes 50 deals a month, activities in Salesforce help you power through your day.

IN THIS SECTION:

Archived Activities

Salesforce archives events and tasks on a schedule according to certain criteria.

SEE ALSO:

Events and Calendars

Tasks

Track Events and Tasks Together

Activities in Salesforce are your events, your tasks, calls you've made, and emails you've sent. Salesforce gives you multiple ways to track your activities together for a more complete picture of your progress on deals and accounts.

IN THIS SECTION:

Track Events and Tasks Together in Lightning Experience

Always know what to do next on each deal that you're working on, and see at a glance what's already happened. Track events, tasks, calls, and emails—collectively called activities—on the Home page, on the Kanban Board, in the activity timeline, and in reports.

Track Events and Tasks Together in Salesforce Classic

You can track events, tasks, calls, and emails—collectively called activities—in lists, calendars, and reports. Track all activities on an account to get a complete picture of the preparation, follow-up, and other planned and completed work associated with the account. Events and tasks share many fields, such as subject, contact name, and related record.

Track Events and Tasks Together in Lightning Experience

Always know what to do next on each deal that you're working on, and see at a glance what's already happened. Track events, tasks, calls, and emails—collectively called activities—on the Home page, on the Kanban Board, in the activity timeline, and in reports.

EDITIONS

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

USER PERMISSIONS

To create tasks and log calls
- "Edit Tasks"

To create events
- "Edit Events"

To send email
- "Send Email"

- Use the Home page.

  On the Home page, Upcoming Events shows the next five meetings on your calendar today, and Today's Tasks shows your next five tasks due today. Past events drop off Upcoming Events as the day progresses.

- Use the Kanban Board.

  A yellow triangle on an opportunity or a lead indicates that the deal has no scheduled meetings or tasks. To get the deal moving, click the triangle and create an activity.

- Use the activity timeline.

  The activity timeline displays your open tasks, upcoming meetings, and past activity on an opportunity, a lead, an account, or a contact.

- Use activities reports.

  You can run various reports to get insight into the progress and history of your accounts and deals. If your Salesforceadmin has enabled Shared Activities, you can run certain standard or custom reports. These reports display details about events or tasks and their related contacts, accounts, opportunities, and other associated records.

Track Events and Tasks Together in Salesforce Classic

You can track events, tasks, calls, and emails—collectively called activities—in lists, calendars, and reports. Track all activities on an account to get a complete picture of the preparation, follow-up, and other planned and completed work associated with the account. Events and tasks share many fields, such as subject, contact name, and related record.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Database.com**

USER PERMISSIONS

To create tasks and log calls
- "Edit Tasks"

To create events
- "Edit Events"

To send email
- "Send Email"

Activities List Views

Salesforce provides several list views of activities. You can also define your own.

All Activities
Shows events and tasks that you can view. In Personal Edition, the All Activities list view shows all your activities.

My Activities
Shows events and tasks that you own.

My Delegated Activities
Shows activities that you created but that are owned by someone else.

Note: Assigning multiple Salesforce users to an event or task is like delegating that activity to those users. The My Delegated Activities list view also shows activities for all assignees, even if you still own that activity. In the list view, the invited user appears as the person assigned to the activity, but the activity's detail page shows you as the assignee.

My Team's Activities
Shows activities owned by users who report to you in the role hierarchy. For your convenience, your team's activities are converted to your time zone.

Other Lists of Activities

Open Activities Related List
The Open Activities related list on a record displays all future events and open tasks related to a record.

Activity History Related List
The Activity History related list of a record displays all completed tasks, logged phone calls, saved interaction logs, expired events, outbound email, mass email, email added from Microsoft® Outlook®, and merged documents for the record and its associated records.

Console Tab
The Console tab lets you find, view, and edit activities and their related records on one screen.

Activities Reports

Standard and Custom Activities Reports
You can run various reports to get insight into the progress and history of your accounts and deals. If your Salesforceadmin has enabled Shared Activities, you can run certain standard or custom reports. These reports display details about events or tasks and their related contacts, accounts, opportunities, and other associated records.

How to Track Your Next Steps and Past Activity

See at a glance what just happened and what to do next on the deals and accounts that you're working on.

IN THIS SECTION:

Manage Work and View Past Activity in Lightning Experience

Always know what to do next on each deal that you're working on, and see at a glance what's already happened. The Home page and the activity timeline both display your open tasks and upcoming meetings. The activity timeline also shows you past activity on an opportunity, a lead, an account, or a contact.

EDITIONS

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

USER PERMISSIONS

To create tasks and log calls
- "Edit Tasks"

To create events
- "Edit Events"

To send email
- "Send Email"

- Take the next steps on a deal or account.

  On the Home page, Upcoming Events shows the next five meetings on your calendar today. Today's Tasks shows your next five tasks due today.

  In the activity timeline, use the Next Steps area to manage open tasks and preview upcoming meetings. Add tasks and meetings using the activity composer above the timeline. You can focus on one kind of activity at a time by choosing a view.

  Activities that you add to the timeline appear automatically on the opportunity, lead, or other record that you're working with. Your activities for other related records also appear under Next Steps. If you add a task on an opportunity, the task also appears on the contact related to the opportunity.

  Note: You can remove a contact or a record on an activity without deleting the activity. For example, suppose that a task is related to Contact A and Contact B, and you want to relate it only to Contact A. Instead of deleting the task, remove Contact B from the `Name` field.

- View past activity.

  The Past Activity area shows your past meetings, calls that you've logged, and emails that you've sent using the activity composer. Like the items under Next Steps, items under Past Activity appear on other related records.

Work on Open Activities and View Activity History in Salesforce Classic

The Open Activities and Activity History related lists tell you at a glance what just happened and what to do next on the deals and accounts you're working on. Use the buttons and links to create a task, request a meeting or an update from a contact, log a call, or send an email. If you use person accounts, you can enter them in either the `Name` or `Related To` field of an event or a task.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Database.com**

USER PERMISSIONS

To create tasks and log calls
- "Edit Tasks"

To create events
- "Edit Events"

To send email
- "Send Email"

Open Activities

The Open Activities related list shows you open tasks, future events, and requested meetings related to other records. For example, suppose that an upcoming meeting on your calendar is related to a contact. That event is displayed in the Open Activities related list of the contact and the account that the contact is related to.

Use Open Activities to do the following:

- Create events and tasks that are automatically related to the record
- Request a meeting with a contact (denotes a meeting request that's emailed to a contact)
- Ask a contact for an update
- Edit, close, or delete activities on the list

You can send meeting requests and requests for updates to a contact, a lead, or a person account.

Activity History

The Activity History related list shows all completed tasks, logged phone calls, saved interaction logs, expired events, outbound email, mass email, email that's added from Microsoft® Outlook®, and merged documents for the record and its associated records. For example, suppose that you've completed a task related to a contact. That task is displayed in the Activity History related list of the contact and the account that the contact is related to.

Use Activity History to do the following:

Log a Call
Note the results of an unplanned phone call, and schedule a follow-up task. The call appears as a completed task under Activity History, and the task appears under Open Activities.

Mail Merge
Generate personalized documents by using data and Microsoft Word templates that your administrator provides. You can choose whether to show the merged document under Activity History. This button isn't available on all types of records.

Send an Email
Send an email to a contact, and relate the email to the contact and the corresponding account, opportunity, case, or custom object. If the subject is longer than 100 characters, it is truncated with ellipses (...). This button isn't available on all types of records.

Send Gmail
Send an email to a contact from your Gmail account. If you don't see this link, ask your Salesforce admin to enable Gmail Buttons and Links. If the Gmail to Salesforce feature is also enabled, the email that you send appears under Activity History on the contact or lead record.

Request Update
Send an email to a contact to request updated contact information. You can update your contact record when you receive the response. This email and mass Stay-in-Touch emails appear under Activity History.

View All
Display a printable view of the activity history for the record, if the record has activity history.

Choose Whether to Display Activity in Self-Service Portal

If your Salesforce admin has added the Case Activities related list to the View Cases page layout in the Self-Service portal, and you've set the field-level security to visible for the `Visible in Self-Service` checkbox on activities, you have the following options for each activity.

- **Make Public**: Display a completed activity under Activity History on the case in the Self-Service portal.
- **Make Private**: Hide a completed activity under Activity History on the case in the Self-Service portal.

Considerations for Using Activities

Keep in mind these considerations for using activities, including the effects of enabling Shared Activities, how primary contacts work, roll-up of activities to parent records, and what the Last Activity date represents.

EDITIONS

Available in Lightning Experience in: **Contact Manager**, **Personal**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Shared Activities Give You a More Accurate Picture of Activity on Your Deals

You can relate different objects to one another to better understand and use your data. For example, when you create a task, you can relate it to both a company and up to 50 contacts (but only one lead). Then Salesforce displays the task together with the company and your contacts in the activity timeline, related lists, and reports. If you don't see the option to add more than one contact to an activity, ask your Salesforce admin to enable Shared Activities.

On the detail page for each contact, you see related events and tasks in the Open Activities and Activity History related lists, alongside other contact details. Conversely, on the detail page for an event or a task, you see the names of all contacts related to that activity, alongside other details. If you don't see all contacts that you've related to an activity, ask your Salesforce admin to add the `Name` related list to activity detail page layouts.

Each Activity Has a Primary Contact

If your Salesforce admin enables Shared Activities, you can relate each event or task to up to 50 contacts. You designate one contact as the primary contact on the activity.

If you delete the primary contact, the next contact on the activity's related list becomes the new primary contact. If that's not the primary contact you want, edit the activity to select another one. Lists and reports display primary and secondary contacts differently. If Shared Activities isn't enabled, you can relate each event or task to only one contact.

Activities Roll Up to Parent Records

Suppose that you create an activity and relate it to an account and a contact. If that contact is related to a different account, the activity rolls up to the contact's parent account. For example:

- The Sales Rep Call task is related directly to the Global Media account and also to the contact Ron Dean.
- Ron Deans parent account is HiTech Solutions.
- The Sales Rep Call task appears in the Global Media account details and also in the HiTech Solutions account details.

Last Activity Date Shows Recent Meetings and Tasks

The Last Activity date in activities related lists and reports represents the last time someone in your company acted on an account or a contact. This date is either the date and time of the most recent event or the due date of the most recently closed related task.

Activities roll up through related records. Therefore, the Last Activity date on an account or a contact can represent an activity that's related indirectly, via a different record. For example, suppose that you have an opportunity related to an account. The Last Activity date shown for the account can represent a meeting related to the opportunity rather than the account.

If your Salesforce admin has enabled Shared Activities, the contact's Last Activity date is based on the latest activity in which the contact is primary. For example:

- Jane is a contact who is related to two tasks.

- Jane is *not* the primary contact for the first task, which has a due date of November 30.
- Jane *is* the primary contact for the other task, which has a due date of November 15.
- The Last Activity date is November 15, because that's the most recent task due date for which Jane is the primary contact.

SEE ALSO:

Considerations for Using Events and Calendars in Lightning Experience

Considerations for Using Tasks in Lightning Experience

Activities Reporting

You can run various reports to get insight into the progress and history of your accounts and deals. If your Salesforceadmin has enabled Shared Activities, you can run certain standard or custom reports. These reports display details about events or tasks and their related contacts, accounts, opportunities, and other associated records.

EDITIONS

Available in Lightning Experience in: **Contact Manager**, **Personal**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in Salesforce Classic in: **All** Editions Except **Database.com**

IN THIS SECTION:

Reports That You Can Run on Activities

Run standard or custom reports that display details about your tasks or events and their related contacts, accounts, opportunities, and other associated records.

Report on Sales Reps' Meetings with Customers

Get insight into how your sales teams are prioritizing their time. Create a custom report that shows which customers sales reps are spending their time with.

Reports That You Can Run on Activities

Run standard or custom reports that display details about your tasks or events and their related contacts, accounts, opportunities, and other associated records.

EDITIONS

Available in Lightning Experience in: **Contact Manager**, **Personal**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in Salesforce Classic in: **All** Editions Except **Database.com**

To View This Information	Use This Report
Activities related to another record type, such as opportunities	Click **Create New Custom Report** on the Reports tab and select the Activities report type.
Number of contacts related to an activity	Activity reports. Add the `Relation Count` column to your reports. For example, you have a task with five contacts. When you run the Tasks and Events report, it displays "5" to indicate the number of contacts related to the task.
One row per contact for each activity	The Activities with Contacts report. Select at least one field from the Contact object. For example, your report includes a task with five contacts. If you include the `Last Name` field from the contact object on the report, you see five rows (one row for each contact) related to this activity. If you don't add fields from the contact object, you see only one row for the activity. The Activities with Contacts report is the only report that:

To View This Information	Use This Report
	• Displays all contacts on an activity • Can be filtered using attributes of contacts other than the primary contact Other reports show the primary contact and the total number of contacts on an activity, but they don't show details of the other contacts. The Activities with Contacts report doesn't indicate which contacts are primary or secondary.
An activity's primary contact in two different reports: Tasks and Events, and Activities with Cases	Either the Tasks and Events report or the Activities with Cases report. For example, if the primary contact for a task is Ron Dean, these reports display that name in the `Contact` field. The primary contact also appears in the `Name` field on the task detail page or event detail page.

Report on Sales Reps' Meetings with Customers

Get insight into how your sales teams are prioritizing their time. Create a custom report that shows which customers sales reps are spending their time with.

1. Create a custom report type.
   a. For Primary Object, choose **Users**.
   b. Complete the remaining required fields: label, description, and category.
   c. Click **Next**.
2. Define a relationship between activities and users.
   a. Relate the Activity Relationships object to the Users object.
   b. Click **Save**.
3. Define the fields that appear in this report type.
   a. In the Fields Available for Reports section, click **Edit Layout**.
   b. Add the following Activity Relationships fields to the layout: `Date`, `Subject`, `Name`, `Related To`, `Relation Count`.
   c. Change the label for the `Name` field to *`Contact`* and for the `Related To` field to *`Opportunity`*.
   d. For each field, select the option to display the field by default.
   e. Click **Save**.
4. Create a report.
   a. In the Reports tab, select the report type that you created in steps 1–3.
   b. Choose **Summary Format**, and create a grouping by Full Name.
   c. Run and save the report.

You now have a report that you can use to help your sales teams optimize the time that they spend with customers.

EDITIONS

Available in Lightning Experience in: **Contact Manager**, **Personal**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in Salesforce Classic in: **All** Editions Except **Database.com**

USER PERMISSIONS

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

To view activities owned by you and users below you in the role hierarchy:
- No permissions needed

To view all activities:
- "View All Data"

Note: If Shared Activities isn't enabled, custom reports based on activity relationships don't include event organizers along with invitees, and they don't show events to which no one has been invited.

Access to Activities

Know who can view, create, and delete events and tasks, and when they have access. Calendar sharing and access are controlled separately from access to individual activities.

Watch a Demo: Who Sees What: Organization-Wide Defaults

Several kinds of settings affect your access to events and tasks owned by others in your Salesforce org.

Role
You have access to view and edit your own activities plus activities assigned to people below you in the role hierarchy of your Salesforce org.

Permissions
People with the "View All Data" permission can view all activities.

Sharing Model
When the activity sharing model is "Controlled By Parent," people with "View All" permission for the type of object on the related record can view the activity.

EDITIONS

Available in Lightning Experience in: **Contact Manager**, **Personal**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Important:

- Suppose you relate one or more contacts to an activity that other people can view. Those people can view the activity along with the name, account name, and title of each contact you relate to the activity—regardless of whether they can otherwise view that information.
- An event with the `Private` checkbox selected is accessible only by the person assigned to the event.

Example: You can view an activity when one of the following applies:

- You're assigned to the activity
- You're above the user assigned to the activity in the role hierarchy
- You have at least read access to the record to which the activity is related
- You have the "View All Data" permission
- You have the "View All" object-level permission for at least one contact and the related opportunity, account or case, and Shared Activities is enabled
- You have the "View All" object-level permission for the related opportunity or account, where the sharing model applied to the record is "Controlled By Parent", and Shared Activities isn't enabled

You can edit or delete an activity (in Salesforce Classic only) when the following applies:

- You have the "Edit Tasks" and "Edit Events" permissions

  AND

- You're assigned to the activity, or
- You're above the user assigned to the activity in the role hierarchy, or
- You have the "Modify All" object-level permission in the related record, where the record's sharing model is "Controlled By Parent." (with Shared Activities enabled, you need the "Modify All" object-level permission for at least one contact and the related record), or

- You have the "Modify All Data" permission

SEE ALSO:

Share Your Calendar in Salesforce Classic

Activity Reminders in Salesforce Classic

Salesforce displays event and task reminders in a reminder window. When you're using Salesforce Classic, the reminder window opens whenever a reminder is triggered. When you log in to Salesforce Classic, a sound plays if you have reminders that have been triggered since the last time you logged in. You can customize reminders in your personal settings.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Information in Reminder Windows

- Up to 100 of the oldest reminders that you haven't dismissed
- The type of activity—event or task
- The activity subject (click to see activity details)
- When the event is scheduled to start or the task is due
- When the reminder is due or that the reminder is overdue

Order of Reminders

Event reminders are sorted by start date and time, and task reminders are sorted by due date. If the option `Sort reminder window by due date` is *not* set, the window displays reminders in the following order:

1. The task and event reminder date and time.
2. The task due date *or* the event start date and time.
3. Ascending alphabetical order by subject.

If `Sort reminder window by due date` is set, the reminders are displayed in the following order:

1. The task due date *or* the event start date and time; if the task has no due date, then the reminder window displays it first
2. The task and event reminder date and time
3. Ascending alphabetical order by subject

Display of Dates and Times

The table shows how reminders display the event start time or task due date.

Activity Type	Due Date or Time That You Specified	Due Date or Start Time Shown in the Reminder
Event	An event time	The date and time that you selected when you created or edited the event
	An all-day event	The date that you selected and the time set for `Start of day` in your Personal Information Settings page
Task	A due date	The date that you selected when you created or edited the task

Activity Type	Due Date or Time That You Specified	Due Date or Start Time Shown in the Reminder
	No due date	The value `None`

Customizable Reminder Settings

Follow these steps to customize your reminder settings.

1. From your personal settings, enter *`Reminders`* in the `Quick Find` box, then select **Activity Reminders**.
2. Change the settings as desired.

Table 1: Reminder Settings

Setting	Result When Setting Is Enabled
`Trigger alert when reminder comes due`	The reminder window opens when a reminder is due.
`Play a reminder sound`	Salesforce plays a reminder sound when a reminder is due.
`By default, set reminder on events to:`	Salesforce sets a reminder on all new events. You choose the amount of time before the event start time when you want a reminder; the default is 15 minutes. You can disable the reminder or change the reminder time when you edit an event.
`By default, set reminder on tasks to:`	Salesforce sets a reminder on all new tasks. You choose the date and time when you want task reminders; the default is 8:00 AM the day that a task is due. You can disable the reminder or change the reminder time when you edit a task.
`Sort reminder window by due date`	Salesforce sorts reminders by due date first and then by the reminder date and time.

If Salesforce doesn't display reminders that you've set, make sure that your browser isn't blocking pop-ups. To test your settings, click **Does Your Browser Block Reminders?**.

Snoozing Reminders

You can snooze one or more reminders at a time. The default snooze option is to remind you again in 5 minutes.

If you click **Snooze** when `Sort reminder window by due date` is not selected, the time overdue is based on the snooze time when the reminder opens again. If you close the reminder window, it opens again when you're notified of the next reminder.

Dismissing Reminders

You can dismiss one or more reminders at a time. To dismiss all reminders in the window, click **Dismiss All**. If the number of reminders exceeded 100 before you clicked **Dismiss All**, then after you click **Dismiss All**, the window displays the additional reminders.

Archived Activities

Salesforce archives events and tasks on a schedule according to certain criteria.

EDITIONS

Available in Lightning Experience in: **Contact Manager**, **Personal**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in Salesforce Classic in: **All** Editions Except **Database.com**

IN THIS SECTION:

1. Criteria for Archiving Activities
   Salesforce archives certain year-old events and tasks every Saturday at approximately 5:00 AM Greenwich Mean Time (GMT).
2. Where Archived Activities Are Displayed
   After Salesforce archives activities, you can view them in exported data and in certain locations in Salesforce Classic. Activities are archived regardless of whether you use Salesforce Classic, Lightning Experience, or Salesforce1. However, although you can view archived activities in exported data and in Salesforce Classic, you can't view them in Lightning Experience or Salesforce1.
3. Considerations for Archiving Activities
   Salesforce doesn't delete archived activities, but you can manually delete them. When you create or refresh a sandbox, archived activities aren't copied.

Criteria for Archiving Activities

Salesforce archives certain year-old events and tasks every Saturday at approximately 5:00 AM Greenwich Mean Time (GMT).

Salesforce archives activities as follows.

- Events that ended more than 365 days ago
- Closed tasks due more than 365 days ago
- Closed tasks created more than 365 days ago, if they have no due date

EDITIONS

Available in Lightning Experience in: **Contact Manager**, **Personal**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Where Archived Activities Are Displayed

After Salesforce archives activities, you can view them in exported data and in certain locations in Salesforce Classic. Activities are archived regardless of whether you use Salesforce Classic, Lightning Experience, or Salesforce1. However, although you can view archived activities in exported data and in Salesforce Classic, you can't view them in Lightning Experience or Salesforce1.

You can view archived activities in these locations.

- In Salesforce Classic, by clicking **View All** in the Activity History related list
- In Salesforce Classic, in the printable view of the record in the `Name` or `Related To` field
- By using the URL for the activity, if you know it
- In weekly data export files

EDITIONS

Available in Lightning Experience in: **Contact Manager**, **Personal**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Considerations for Archiving Activities

Salesforce doesn't delete archived activities, but you can manually delete them. When you create or refresh a sandbox, archived activities aren't copied.

EDITIONS

Available in Lightning Experience in: **Contact Manager**, **Personal**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Events and Calendars

Use Salesforce to schedule meetings and presentations with colleagues, customers, and prospects. With your calendar in Salesforce, everyone stays informed—your sales team, your sales manager—and meeting prep is easy. Just drill down from a calendar to related records, Chatter feeds, files, contracts, and more for any lead, contact, opportunity, or account.

IN THIS SECTION:

Manage Events

In Salesforce, events are a powerful tool for keeping on top of customer relationships and closing deals. You can relate events to opportunities, leads, accounts, and contacts. Track them on those records, in your calendar, and in reports.

Calendar Sharing in Salesforce Classic

Grant others access to view or edit your calendar in Salesforce Classic, or view a calendar that a coworker shares with you.

Calendar Views

Calendar views display your events in Salesforce.

Considerations for Using Events and Calendars

Salesforce always displays an event's date and time in the time zone you've chosen in My Settings. Working with meetings and scheduling is different in Lightning Experience and Salesforce Classic.

Invitations and Scheduling in Salesforce Classic

In Salesforce Classic, you can invite people to meetings, accept meeting invites, and use Cloud Scheduler to propose meeting times. You can also create a Microsoft® Outlook® appointment for an event in Salesforce.

SEE ALSO:

Activities

Tasks

Manage Events

In Salesforce, events are a powerful tool for keeping on top of customer relationships and closing deals. You can relate events to opportunities, leads, accounts, and contacts. Track them on those records, in your calendar, and in reports.

IN THIS SECTION:

Manage Events in Lightning Experience

Create, update, and track events using the Home page, your calendar, the Kanban Board, or the activity timeline. You can also track events in reports.

Manage Events in Salesforce Classic

You can track, create, and update your own and others' meetings and invitation responses in different locations in Salesforce. Salesforce displays events in activities list views and calendar views; Chatter feeds; and records that events are related to, such as contacts and accounts. You can also track events in reports.

Manage Events in Lightning Experience

Create, update, and track events using the Home page, your calendar, the Kanban Board, or the activity timeline. You can also track events in reports.

- On the Home page, Upcoming Events shows the next five meetings on your calendar today. Past events drop off the list as the day progresses.
- Use the calendar to work with all your events and to create events. In the navigation menu, choose **Calendar**.

  You can't share your calendar with others or invite others to an event.
- On the Kanban Board, opportunities and leads show alerts when no open activities exist. To create an event, click the yellow triangle.
- Use the activity timeline to monitor and update upcoming and past events on an opportunity, a lead, an account, or a contact.
- Use activities reports to view events owned by people below you in the role hierarchy of your Salesforce org.

EDITIONS

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

USER PERMISSIONS

To create events
- "Edit Events"

Note: You can remove a contact or a record from an event without deleting the event. For example, suppose that an event is related to Contact A and Contact B, but you want to relate it only to Contact A. Instead of deleting the event, remove Contact B from the `Name` field.

Manage Events in Salesforce Classic

You can track, create, and update your own and others' meetings and invitation responses in different locations in Salesforce. Salesforce displays events in activities list views and calendar views; Chatter feeds; and records that events are related to, such as contacts and accounts. You can also track events in reports.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Events with invitees not available in: **Personal** Edition

USER PERMISSIONS

To create events
- "Edit Events"

Track Events

View a Demo: How to Track Calls, Emails, and Meetings

You can track events belonging to you and to others in the following locations. To see activities list views, click on the Home tab or any calendar view, or go to the calendar day or week view.

Events That You Own

- The Home tab, in the Calendar section
- An activities list view: Choose an existing list view or customize one
- Your Chatter feed: Follow an event to track posts, comments, and updates about it

Events Owned by People Who Have Shared Their Calendars with You

The multi-user calendar view

Events That You've Assigned to Others

- The **My Delegated Activities** list view
- Activities reports

Events Owned by People Below You in Your Organization's Hierarchy

- The **My Team's Activities** list view
- Activities reports

Upcoming Events

- A calendar view
- The **Upcoming Events** list view
- The Open Activities related list for a record related to an event

Past Events

- A calendar view
- The **My Activities** list view
- The Activity History related list for a record related to an event

Events Related to Another Record, Such as a Contact or an Account

- The other record's detail page, in the Open Activities and Activity History related lists
- Your Chatter feed and in the Chatter feed for the other record
- Activities reports

View Event Details

In a calendar view, in an activities list view, in a related list, or on the Home tab, there are two ways to see event details:

- Hover your mouse over an event's subject.
- Click the subject.

On an event detail page, to view the details of a single event in a recurring series ( ), select the View Event subtab. To view the details for the series, select the View Series subtab.

identifies events with invitees.

Create Events

On the Home Tab
On the Home tab, under Calendar, click **New Event** or **New Meeting Request**.

In a Chatter Feed
If you create an event in the feed for a record such as a contact, Salesforce automatically relates the event to the record.

In the Sidebar
In the sidebar in Salesforce, in the Create New drop-down list, select **Event**.

On the Detail Page of Another Record
On the Open Activities related list, click **New Event** or **New Meeting Request**. Salesforce automatically relates the event or meeting request to the record.

On the Detail Page of an Event with Invitees
On the detail page of an event that you've invited one or more people to, click **Clone**. You can clone an event that has at least one invitee and isn't a recurring event.

In a Calendar View

- Click **New Event**.
- In a day view, click a time, such as 9:00 AM.
- In a day or week view, double-click a time slot. You can't double-click to create a recurring event or an event that you invite people to. If double-clicking doesn't open a new event, ask your administrator to enable Click-and-Create Events.
- In a week or month view, click .

In an Activity List View ( )

In a list view, click **New Event**.

In a List View of Contacts, Leads, or Other Records

In a list view of contacts, leads, or other records, click at the bottom of the page to add a weekly calendar view to the page. Create an event related to a record by dragging the record from the list view down to a time slot on the calendar. If you don't see , ask your Salesforce admin to enable Drag-and-Drop Scheduling.

Note: If you schedule meetings with people in a different time zone, your calendar shows their available and busy times in your time zone. An individual person's `Time Zone` setting (as specified on the personal information page) overrides the `Default Time Zone` set for the Salesforce org.

Update Events

Anywhere (except reports) that you can view event details, you can edit any event that you have permission to edit.

You can edit an event in several ways:

- To reschedule an event, in a calendar view, drag the event to a different time slot. For best results, place your mouse over the subject line of the event before dragging it. If the event is a recurring event ( ), only the single occurrence that you drag is changed, not the entire series.
- Click **Edit** next to the event in an activities list view, an Open Activities related list, or an Activity History related list. The event detail page opens.
- Go to a calendar view, an activities list view, a related list, or the Home tab. Hover your mouse over the subject of an event. A small window with editing options appears.
- Use Cloud Scheduler to collaborate with others in choosing a meeting date and time. When you confirm the meeting date and time, you convert the meeting into a Salesforce event, which you can edit or delete like any other event.

Calendar Sharing in Salesforce Classic

Grant others access to view or edit your calendar in Salesforce Classic, or view a calendar that a coworker shares with you.

Watch a Demo: Who Sees What: Organization-Wide Defaults

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

IN THIS SECTION:

Share Your Calendar in Salesforce Classic

You can grant coworkers, personal and public groups, roles, or roles and subordinates access to view or edit your calendar in Salesforce Classic.

View a Coworker's Calendar in Salesforce Classic

When coworkers share their calendars with you, you can view the calendars in Salesforce Classic.

SEE ALSO:

Activity Reminders in Salesforce Classic

Access to Activities

Share Your Calendar in Salesforce Classic

You can grant coworkers, personal and public groups, roles, or roles and subordinates access to view or edit your calendar in Salesforce Classic.

Watch a Demo: Who Sees What: Organization-Wide Defaults

Options vary for sharing your calendar with others, depending on the organization-wide calendar sharing level that your Salesforce admin sets. The options can make your calendar more available to others, but not less. Calendar sharing settings affect the visibility of items on a calendar, but they don't give coworkers access to event detail pages.

Events associated with a record that you own are visible to anyone above you in the role hierarchy.

1. From your personal settings, enter `Calendar Sharing` in the Quick Find box, then select **Calendar Sharing**.
2. To share your calendar with others, click **Add**. Select the users, roles, or groups whose activities you want to display in your calendar.
3. Specify how you want to share your calendar. Select one of the following:

   Hide Details
   Coworkers can see whether given times are available but can't see any other information about the nature of events in your calendar.

   Hide Details and Add Events
   Coworkers can see whether given times are available but can't see details of events. They can insert events in your calendar.

   Show Details
   Coworkers can see detailed information about events in your calendar.

   Show Details and Add Events
   Coworkers can see detailed information about events in your calendar, and they can insert events in your calendar.

   Full Access
   Coworkers can see detailed information about events in your calendar, insert events, and edit existing events.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

USER PERMISSIONS

To create events
- "Edit Events"

SEE ALSO:

Access to Activities

View a Coworker's Calendar in Salesforce Classic

When coworkers share their calendars with you, you can view the calendars in Salesforce Classic.

Your access to view event details, edit events, or create events varies by calendar. Your access to a given calendar depends on how your Salesforce admin sets up your org and the calendar sharing options that your coworker has chosen.

You can view all events owned by people below you in the role hierarchy.

- In day, week, or month view, click **Change** next to the name at the top of the calendar, then select the calendar that you want to view.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

Calendar Views

Calendar views display your events in Salesforce.

IN THIS SECTION:

Calendar Views in Lightning Experience

The calendar displays all events that you own in Salesforce, including events that take place outside your business hours. View, create, and edit your events in a day or week view. To see event details, click an event.

EDITIONS

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

SEE ALSO:

Considerations for Using Events and Calendars in Lightning Experience

Calendar Views in Salesforce Classic

Calendar views display your own calendar and coworkers' calendars along with list views of open tasks. On the Home tab, the Calendar section shows upcoming events, a date picker for the month, and links to other calendar and activity views. You can share your calendar with coworkers and print calendars and task lists.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Where to Select or Switch Views

You access calendar views in the following locations.

- The Calendar section at the bottom of the Home tab (if your Home tab doesn't display the Calendar section, ask your Salesforce admin to customize your home page layout)
- The Calendar shortcut in the sidebar that opens your last used calendar view (if your Salesforce admin has enabled the shortcut)
- The detail page for an event or a task
- An activities list view

In any view, when you hover your mouse over an event that you have permission to see and edit, an overlay displays event details and actions that you can perform. Your Salesforce admin configures the content of the overlays.

Day, Week, Month, and Activity Views

Calendar views display events as follows:

- A day at a time: 1 or **Today**
- On a date that you choose using
- A week at a time: 7 or **This Week**
- In a week view, with or without weekends
- A month at a time: 31 or **This Month**
- On a day that you choose: Click in the week or month view

- In a list of activities (events and tasks):

Inside any calendar view, you can switch views by clicking the icon for a different view. In a week or month view, click a date to see that day's view.

Single-User View and Views of Other Calendars

The single-user view ( ) displays up to 1,000 events in one month in any of the following:

- Your own calendar
- The calendar of another user (not available in Personal Edition)
- A public calendar
- A resource calendar

Click **Change** to switch users or calendars. Click **Share My Calendar** to allow other users to view your calendar. To reset your view to your own calendar, click **Back to My Calendar**.

Note: Activities related to another record are visible to users above the activity owner in the role hierarchy regardless of whether your organization's sharing settings specify the use of hierarchies.

All single-user day and week views of a user's calendar display a list of the user's open tasks alongside the calendar. A drop-down list lets you choose other views, for example overdue tasks or tasks due today.

By default, your daily and weekly calendar views display the range of hours specified as `Start of Day` and `End of Day` on your Personal Information page.

If you sync events from Outlook using Salesforce for Outlook, you may see a banner at the top of your calendar that is linked to a list of your unresolved events: synced Outlook events that haven't been assigned to Salesforce records.

Multi-User View

The multi-user view ( ) displays several users' calendars and activities together. Choose an existing list view of users from the **View** drop-down list or click **Create New View**.

The view shows each person's availability. A legend in the view shows busy and out-of-office time. If an event is set to show the time as free, then multi-user views don't display it.

Consider these limitations of the multi-user view:

- Drag-and-drop editing isn't available in the multi-user view.
- The multi-user calendar works differently in the partner portal. For example, partners can view events only on the calendars of people in their own company and their channel manager.

Printable View

After you select a view and click **Printable View**, adjust the view before printing it.

- To send the printable view to a printer, click **Print This Page**.
- To change the dates before printing, click , , **Today**, **This Week**, or **This Month**.
- In a day or week view, select a different task list view if you like.
- In multi-user views, in the **Sort by** drop-down list, select `Time` to include all users' events on a single calendar. Or select `User` to display a separate calendar for each user.

Considerations for Using Events and Calendars

Salesforce always displays an event's date and time in the time zone you've chosen in My Settings. Working with meetings and scheduling is different in Lightning Experience and Salesforce Classic.

IN THIS SECTION:

Considerations for Using Events and Calendars in Lightning Experience

Be aware of these considerations for using events and calendars in Lightning Experience, including creating, updating, and owning events.

EDITIONS

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

Limit on Number of Items Displayed in Calendar
Calendar views can display up to 150 items.

No Calendar Sharing
You can't share your calendar with coworkers or your manager. Managers in the role hierarchy can use reports to view events owned by people below them in the role hierarchy, but not to edit them.

Events Can Have One Owner at a Time
Only one person can own a meeting. If you reassign a meeting to someone else, it no longer appears on your calendar.

No Meeting Invites
You can't invite people to meetings. However, if someone creates a meeting in Salesforce Classic and invites you to it, it is displayed in your calendar.

No Recurring Events
You can't create or edit recurring events. However, if a Salesforce Classic user creates a series of recurring events, you can view and edit the events from the series in Lightning Experience.

No Event Reminders
Lightning Experience doesn't display event reminders.

Your Calendar Doesn't Indicate Your Business Hours
Your calendar doesn't indicate the business hours you've set in your personal settings.

SEE ALSO:

Considerations for Using Tasks in Lightning Experience
Considerations for Using Activities

Considerations for Using Events and Calendars in Salesforce Classic

Be aware of these considerations for creating, updating, owning, and inviting others to events in Salesforce Classic.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Events with invitees not available in: **Personal** Edition

Event Editing

Permission to Edit Other People's Events

Permission to edit other people's events is controlled by your organization's calendar sharing model and your personal calendar sharing. However, regardless of these settings, managers in the role hierarchy can always edit events owned by people who report to them.

Permission to Edit Public Calendars and Resource Calendars

Permission to edit events in public and resource calendars is controlled by the calendar sharing model.

Changes to Fields in Single Events and Their Series

If you change a field in a single event and then change the same field in the series, the series change overrides the change to the single event.

Event Deletion

Declining Event Invitations

If you decline an event that you've been invited to, Salesforce removes the event from your calendar. Only the event owner can delete an event with invitees.

Notification for Deleted Event Series

If an event owner deletes a series of recurring events, every invitee receives an email notification that the series of events has been canceled.

Handling of Past and Future Events in Deleted Series

If you delete a series of events, you delete only future events. Events that have already happened aren't affected.

If a series is deleted and it contains events that occurred in the past, the series isn't moved to the Recycle Bin. As s a result, the series can't be restored from the Recycle Bin.

If a series is deleted and it doesn't contain past events, Salesforce moves the series to the Recycle Bin. Individual events that were part of the series aren't moved to the Recycle Bin.

Handling of Series Restored from Recycle Bin

If you restore a series from the Recycle Bin, single events are created. Those single events contain both the details defined by the series and any changes or additions made to them individually before the series was deleted.

Deleted Public Calendars

If you delete a public calendar, Salesforce doesn't put it in the Recycle Bin.

Recurring Events ( )

Effects of Changes to an Event Series and Single Events in a Series

Warning: Changes to any fields in an event series override changes previously made to single events.

If you change the following settings, the status of invitees for future events is reset to Not Responded. You lose messages sent with invitees' responses and other changes to single future events. Triggers and workflows are also reset, and links to future events break.

- All-day event checkbox

- Start or end time
- Location
- Recurrence frequency
- Recurrence start or end date, if you send updates to invitees

If you don't send updates, and you only extend the recurrence end date, then future events aren't affected.

Display of Original and New Start or End Time for a Changed Series

If the organizer changes the start or end time of a single event in a recurring series, the calendar views and the Calendar section of the Home tab show the updated time. However, the detail page of the single event continues to show you the original time until you accept or decline the series.

Maximum Number of Invitees

Duration of Events

If your Salesforce admin has enabled multiday events, then you can create events up to 14 days long, except recurring events. When you create a recurring event, the maximum duration of the single events in the series is 24 hours. After you create the series, you can change the duration to up to 14 days if your Salesforce admin has enabled multiday events.

Event Reminders

If you create a recurring event and you leave the reminder checkbox selected, you receive a reminder for each single event in the series.

Attachments to Events

You can attach files to a series of recurring events. After you create a series, you can add or delete attachments to each single event in the series.

Attachments are displayed on the event detail page only, not on the detail page for other records that the event is related to. If you don't see the Attachments related list on the event detail page, ask your Salesforce admin to add it to the event page layout.

Inviting People and Scheduling Resources

Access Requirements for Inviting People and Resources

You need at least read access to the contacts and leads that you invite to an event. You need at least "Add Events" on a resource to invite it to an event.

Permission to Edit Events with Invitees

identifies an event with one or more invitees. You can edit an event that you've invited people to only if you own the event. If the event isn't a recurring event, you can assign it to a different person.

If you want to send an email update, you can send it to all invitees or only to the people you added or deleted during editing.

Event Attendance

Declining an event removes it from your calendar. The event owner doesn't receive an email notification when an invitee accepts or declines an invitation.

Relating Events to Multiple Contacts (Shared Activities)

Maximum Number of Related Contacts

You can relate an event to up to 50 contacts (but only one lead) in the `Name` field, including one primary contact. If you don't see next to the `Name` field, ask your administrator to enable Shared Activities.

No Support for Recurring Events or Multiple Event Owners

You can't relate multiple contacts to a recurring event series or an event owned by multiple people.

Assigning Events to Coworkers

Default Event Owner

By default, an event is assigned to the user who creates it. To assign independent copies of a new event to multiple people, click  next to **Assigned To**. Inn the window that opens, click the Multiple Users tab. The `Assigned To` field isn't available in Personal Edition.

Spell Checking

Not All Languages Supported

If you don't see Spell Checker on the `Description` field, ask your Salesforce admin to enable it. However, Spell Checker does not support all the languages that Salesforce supports. For example, Spell Checker doesn't support Thai, Russian, and double-byte languages, such as Japanese, Korean, or Chinese.

Events in Chatter

New Events in Chatter Feeds

If a new event is related to a record such as a lead, an account, or a custom object, the event appears in the feed for that record. On any record you follow, you see feed items for all events, regardless of who created them.

Creating Events in Feeds

Your Salesforce admin specifies whether you can use Chatter to create events for different types of records. For example, some people can view but not create events in the feeds for accounts that they have access to.

No Recurring Events in Chatter

Your Chatter feed doesn't display recurring events, either in series or singly, and you can't follow recurring events in Chatter.

SEE ALSO:

Calendar Views in Salesforce Classic

Invitations and Scheduling in Salesforce Classic

In Salesforce Classic, you can invite people to meetings, accept meeting invites, and use Cloud Scheduler to propose meeting times. You can also create a Microsoft® Outlook® appointment for an event in Salesforce.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

IN THIS SECTION:

Invite People to an Event and Schedule Resources in Salesforce Classic

Invite users, contacts, and leads to a meeting, and schedule meeting resources.

Quickly Schedule a Meeting About an Account, a Contact, or a Lead in Salesforce Classic

Drag-and-drop scheduling lets you schedule events related to accounts, contacts, and leads without leaving the list view page. You drag records from list views onto weekly calendar views and enter the details of the event in an overlay.

Create an Outlook Appointment for an Event in Salesforce Classic

Create an appointment in Microsoft® Outlook® from the details of an event.

Create an Event in a Public Calendar in Salesforce Classic

A public calendar contains a schedule of events that is available to a group of users, such as a sales events calendar for a sales department. If your Salesforce admin has set up a public calendar and you're assigned to that group, you can view the calendar. You can also add an event just as you would add an event to your own calendar.

Use Cloud Scheduler to Request Meetings in Salesforce Classic

Cloud Scheduler lets you request a meeting with a contact, a lead, a person account, or a coworker.

Respond to Event Invitations in Salesforce Classic

Accept or decline an invitation to an event. After you've accepted an invitation, you can add the event to Outlook.

Invite People to an Event and Schedule Resources in Salesforce Classic

Invite users, contacts, and leads to a meeting, and schedule meeting resources.

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1. On the Event detail page, in the Select Invitees section, click **Select**.
2. In the Select Invitees dialog box, search for the type of invitee: users, leads, contacts, or resources.
3. Enter a name or part of a name or leave the field blank to expand the search. Click **Find**.
4. Use ▶ and ◀ to select and deselect people or resources. To invite more people or resources, search again and select the invitees you want.
5. Click **Done**.
6. Review the calendar of each invitee and adjust the date and time of the event if necessary. The availability of invitees is indicated in color on their calendars: busy time is blue and out-of-office time is red. If an invitee has more than one event scheduled for a particular time, all the events are shown on the calendar. To see the details of an event, hover your mouse over the event on the calendar.
7. To remove an invitee from an event, click **Remove** next to the invitee's name.
8. Click **Save & Send Update**.
   Invited leads, contacts, and person accounts receive an email containing a link to a web page. They can accept or decline the invitation for the event or event series. You also receive an email summary of the event. If an invited resource is available at the given time, the resource automatically accepts the invitation.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

USER PERMISSIONS

To invite people to an event:
- "Edit Events"

Quickly Schedule a Meeting About an Account, a Contact, or a Lead in Salesforce Classic

Drag-and-drop scheduling lets you schedule events related to accounts, contacts, and leads without leaving the list view page. You drag records from list views onto weekly calendar views and enter the details of the event in an overlay.

If you don't see the **Open Calendar** link, ask your administrator to enable drag-and-drop scheduling.

1. Click the **Open Calendar** link at the bottom of a list view.
   A weekly view of a calendar appears below view.
2. Drag a record from the list to a time slot on the calendar.
   A popup window for creating an event appears. The event is already related to the record that you dragged from the list view.

- The **Open Calendar** link appears only at the bottom of list views for accounts, contacts, and leads.
- Drag-and-drop scheduling isn't available for the Console tab, events that people have been invited to, recurring events, accessibility mode, or Connect Offline.
- List views that include drag-and-drop scheduling can take slightly longer than usual to be displayed.
- When you drag the bar in between the list and calendar to resize either one, the size is saved for all views in which you use drag-and-drop scheduling. You can resize the list and calendar at any time.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

USER PERMISSIONS

To enable drag-and-drop scheduling:
- "Customize Application"

To create events:
- "Edit Events"

USER PERMISSIONS

To create events:
- "Edit Events"

Create an Outlook Appointment for an Event in Salesforce Classic

Create an appointment in Microsoft® Outlook® from the details of an event.

1. On the detail page for an event, click **Add to Outlook**.
2. Click **Open** to immediately add the event to Outlook, or save it to your computer as a `.vcs` file. If you save it as a `.vcs` file, import the file into Outlook.

   The Outlook appointment is added to the "salesforce.com" folder and tagged with the "salesforce.com" category so that duplicates aren't created during synchronization.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Consider the following when you add an event to Outlook.

- When you view the event in Outlook, the description doesn't display line breaks that you entered in the event's `Description` field. Line breaks are replaced by two spaces in the `.vcs` file.
- You can also sync your Salesforce events to Outlook using Exchange Sync or Salesforce for Outlook.

Note: You can also use the Salesforce App for Outlook and Salesforce for Outlook to add Microsoft® Outlook® emails to Salesforce. These email integration applications let you log an outbound or sent email as a task in Salesforce. Then you can associate this task with a contact, a lead, or another record.

Create an Event in a Public Calendar in Salesforce Classic

A public calendar contains a schedule of events that is available to a group of users, such as a sales events calendar for a sales department. If your Salesforce admin has set up a public calendar and you're assigned to that group, you can view the calendar. You can also add an event just as you would add an event to your own calendar.

1. On a calendar view, click **[Change]** to switch to a public calendar.
2. Choose the time and date of the event:
   - On the day view, click a time such as **9:00 AM** to add an event.
   - On the week or month view, click + to add an event on a particular date.
3. Enter the details of your event.
4. Click **Save**. Alternatively, click **Save & New Task** to save the event and begin creating a task, or **Save & New Event** to save and begin creating an event.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition**, **Group Edition**, and **Database.com**

USER PERMISSIONS

To create an event in a public calendar:
- "Edit Events"

Use Cloud Scheduler to Request Meetings in Salesforce Classic

Cloud Scheduler lets you request a meeting with a contact, a lead, a person account, or a coworker.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

IN THIS SECTION:

When you use Cloud Scheduler to request a meeting with a contact, a lead, a person account, or a coworker, Salesforce creates a unique Web page for your meeting that displays the proposed meeting times. When invitees visit the page, they select the times that work for them and send you a reply. Salesforce tracks all the responses so that you can pick the best time to meet when you confirm the meeting.

Use Cloud Scheduler to request a meeting with a contact, a lead, a person account, or a coworker.

When you request a meeting using Cloud Scheduler, you can either propose meeting times or let Salesforce propose times for you. One of the benefits of letting Salesforce propose meeting times happens when there's a long delay between the time you send the meeting request and when the first invitee views it. For example, if you request a meeting with a contact on a Monday and that contact doesn't view your request until Thursday, Salesforce proposes times from Thursday forward instead of when the meeting request was sent.

When you use Cloud Scheduler to request a meeting, you can add and remove invitees at any time.

If you used Cloud Scheduler to request a meeting that hasn't been confirmed, you can reschedule it and propose new times. However, when you confirm a meeting, it's converted to an event, so you can't propose new times. To reschedule an event, edit the event to change its date and send an update to the invitees.

After you use Cloud Scheduler to request a meeting, wait for the invitees to reply with the times they can meet. When this happens, you receive an email notification, and the meeting in Salesforce is automatically updated with the times the invitees selected. You can then choose the best time to meet and confirm the meeting.

Cancel a Requested Meeting in Salesforce Classic

If you used Cloud Scheduler to request a meeting and the meeting hasn't been confirmed, you can cancel the meeting, and Salesforce automatically sends a cancellation notice to the invitees. When you confirm a meeting, then it's converted to an event, which you can delete like any other event.

How Cloud Scheduler Works in Salesforce Classic

When you use Cloud Scheduler to request a meeting with a contact, a lead, a person account, or a coworker, Salesforce creates a unique Web page for your meeting that displays the proposed meeting times. When invitees visit the page, they select the times that work for them and send you a reply. Salesforce tracks all the responses so that you can pick the best time to meet when you confirm the meeting.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

USER PERMISSIONS

To request a meeting:

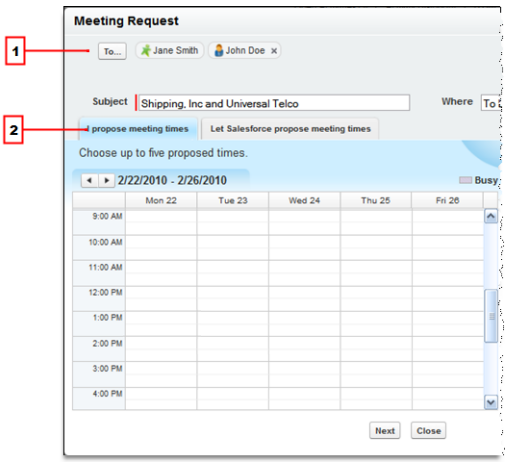
- "Edit Events"

  AND

  "Send Email"

Step 1: You Request a Meeting and Propose Meeting Times

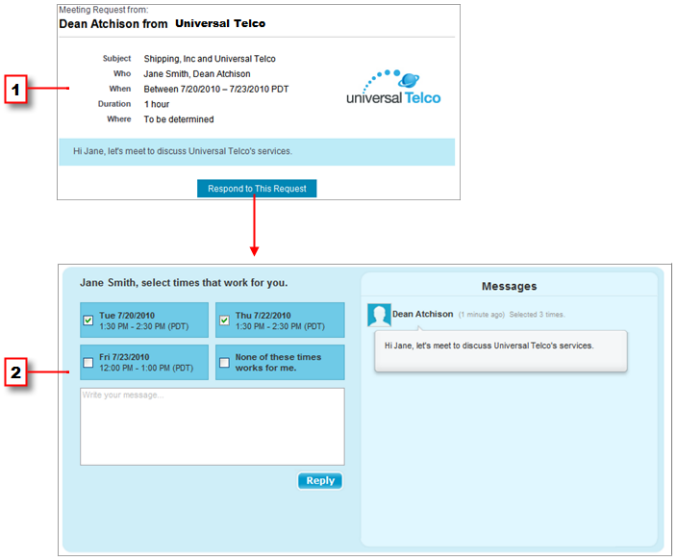
Go to either the Calendar section on the Home tab or the Open Activities related list on the detail page of the contact, lead, or person account you want to request a meeting with. Click **New Meeting Request** to open the Meeting Request page.



1. Click **To** to invite coworkers, leads, contacts, or person accounts to the meeting.
2. Click in the calendar to propose up to five meeting times, or let Salesforce propose times for you.

Step 2: Invitees Pick the Times They Can Meet

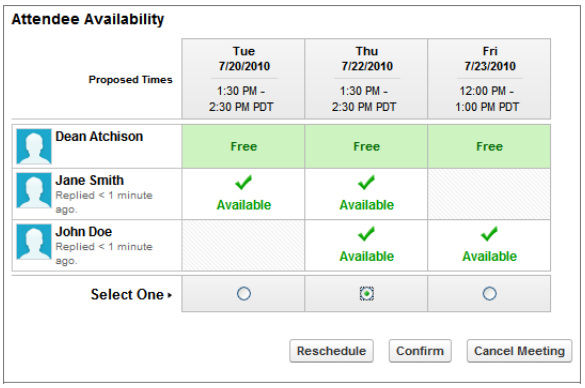
Salesforce emails a meeting request to the invitees so they can pick the times they are available.



1. In the meeting request, invitees click **Respond to This Request** to open your meeting's Web page.
2. On the meeting Web page, invitees pick the proposed times that work for them and send you a reply.

Step 3: You Confirm the Meeting

Salesforce keeps track of all the responses so you can see when each invitee is available. You then select the best time to meet and confirm the meeting.



Request a Meeting in Salesforce Classic

Use Cloud Scheduler to request a meeting with a contact, a lead, a person account, or a coworker.

Before you use Cloud Scheduler, consider these tips:

- You must have at least read access to the contacts, leads, and person accounts that you request a meeting with.
- Each invitee must have an email address specified in their record so Salesforce can send them a meeting request.
- You can invite up to 50 people to a meeting. Invitees can consist of only contacts, leads, or person accounts, only coworkers who use Salesforce, or a combination.
- We recommend you install Salesforce for Outlook so you can sync your calendar events between Salesforce and Microsoft® Outlook®.

  When proposing meeting times, it's helpful to have your Salesforce calendar up-to-date so you can see your free and busy times.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

USER PERMISSIONS

To request a meeting:
- "Edit Events"

  AND

  "Send Email"

To request a meeting:

1. Go to either the Calendar section on the Home tab or the Open Activities related list on the detail page of the contact, lead, or person account you want to invite to a meeting.
2. Click **New Meeting Request**.

   If this button doesn't display in the Calendar on the Home tab or on the Open Activities related list, ask your Salesforce administrator to add it.
3. Click **To** to invite coworkers, leads, contacts, or person accounts to the meeting.
   a. Select the type of invitee from the drop-down list. person accounts are returned in contact searches and can be added as invitees.
   b. Enter a name or part of a name in the text field, or leave the field blank to expand the search.
   c. Click **Go!**.
   d. In the Search Results area, select the boxes next to the people you want to invite and click **Insert Selected**. To add more invitees, perform a new search and select more people as needed. If there's a warning icon (⚠) next to a person's name, you can't invite them to the meeting because they don't have an email address specified in their record. After you add an email address to their record, you can invite them to meetings.
   e. Click **Done**.
   f. To remove someone you just invited, click "x" next to the person's name in the `To` field. You can remove all invitees unless you requested the meeting from an Open Activities related list. In that case, the first contact, lead, or person account in the `To` field can't be removed.
4. Enter a subject and location.

   If you requested the meeting from an Open Activities related list, the default subject is a combination of the account name for the lead or contact and the company name specified in your personal information. For example, if you're meeting with a contact from the Sterling company and you work for ACME, the default subject is `Sterling and ACME`. The default location is always `To be determined`.
5. Select one of these tabs:
   - **I propose meeting times**—Propose up to five meeting times by picking times in the calendar.
   - **Let Salesforce propose meeting times**—Choose the duration and time frame of the meeting and let Salesforce propose up to five meeting times for you.

6. Click **Next**.
7. Write a message to the invitees, and click **Send**.

   Note the following:

   - Your email signature is automatically added to your message.
   - After you click **Send**, Salesforce emails a meeting request to the invitees.
   - Your meeting's Web page displays all messages between you and the invitees. This includes messages that invitees write when responding to your request.
   - If you requested the meeting from an Open Activities related list, the meeting appears on the detail page for that contact or lead only. It doesn't appear on the Open Activities related list for any other invitee. For example, if you requested a meeting with Jane Smith from her contact detail page and then clicked the **To** field to invite John Doe, the requested meeting only appears on the Open Activities related list for Jane Smith and not John Doe. If you requested the meeting from the Calendar section on the Home tab, the meeting doesn't appear on the Open Activities related list for either Jane Smith or John Doe.

After you send your meeting request, wait for the invitees to reply with the times they can meet. Then confirm the meeting by selecting a final meeting time.

Tips for Proposing Meeting Times in Salesforce Classic

When you request a meeting using Cloud Scheduler, you can either propose meeting times or let Salesforce propose times for you. One of the benefits of letting Salesforce propose meeting times happens when there's a long delay between the time you send the meeting request and when the first invitee views it. For example, if you request a meeting with a contact on a Monday and that contact doesn't view your request until Thursday, Salesforce proposes times from Thursday forward instead of when the meeting request was sent.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

USER PERMISSIONS

To request a meeting:
- "Edit Events"

  AND

  "Send Email"

Proposing Meeting Times

When you propose meeting times:

- Proposed times aren't saved to your Salesforce calendar. The meeting only appears in your calendar after you confirm the meeting.
- When the invitees view your meeting request, the proposed times are shown in your time zone. Proposed times aren't shown in the invitees' time zones.
- You can't propose a time that occurs in the past (before the black line in the calendar).
- The calendar's shaded areas show when you and the other invited coworkers are busy based on your Salesforce calendars. Darker shades show when multiple coworkers are busy at the same time.
- Use the `Duration` field to change the length of your meeting.
- To remove a time you proposed, hover over the proposed time and click "x".

Letting Salesforce Propose Meeting Times

When Salesforce proposes meeting times:

- You won't know which times are proposed until after you send the meeting request. Once the first invitee views your request, Salesforce checks the calendars of all coworkers invited to the meeting and proposes meeting times based on their availability.

  Salesforce tries not to propose the same times that invitees have already selected for other unconfirmed meetings. For example, if you request a meeting for the next five business days and your invitees respond that they can meet on Tuesday and Wednesday

from 2:00 to 3:00 p.m., and then you request another meeting for the same time frame, Salesforce won't propose times for Tuesday and Wednesday from 2:00 to 3:00 p.m. unless your calendar is completely booked with confirmed meetings and other events.

- By default, Salesforce proposes meeting times between 9:00 a.m. and 5:00 p.m. in your time zone. However, if you have changed the `Start of day` and `End of day` fields in your Personal Information Settings page, Salesforce uses those settings instead.

Note: If you don't want to meet at a specific time of day (like your lunch hour), schedule a recurring event in your Salesforce calender to block out that time.

The following table describes the settings that control how Salesforce proposes meeting times.

Field	Description
`Duration`	The length of your meeting.
`Time Frame`	How far in advance Salesforce proposes meeting times: • Next 5 Business Days/Next 10 Business Days—Salesforce tries to spread out the proposed times over the specified time frame. For example, if your time frame is Next 5 Business Days and the first invitee views the request on a Monday, Salesforce tries to propose a time for each day of that week. If some of your days are booked, Salesforce condenses the proposed times into fewer days. Business days exclude Saturdays and Sundays. • Whenever—Salesforce tries to propose five meeting times over the next five business days, and if it can't propose enough times, it extends the range over the next 10 business days. If Salesforce still can't find five times to propose, it looks for available times over the next four weeks. When you select this option, some of the times Salesforce proposes could be seven weeks away (5 business days + 10 business days + 20 business days = 7 weeks).

Change the Invitees to a Requested Meeting in Salesforce Classic

When you use Cloud Scheduler to request a meeting, you can add and remove invitees at any time.

1. Open your meeting using one of these methods:
   - From the Calendar section on the Home tab, click the **Requested Meetings** subtab and then click the subject of your meeting. If the **Requested Meetings** subtab doesn't display on the Calendar section, ask your administrator to add it.
   - If you requested the meeting from the Open Activities related list for that contact, lead, or person account, click the subject of your meeting in the related list.
   - From the email notification that you received when an invitee responded to your meeting request, click **View Response and Schedule Meeting**.
2. Do either of the following:
   - Click **To** to invite coworkers, leads, contacts, or person accounts to the meeting.
   - Click "x" next to an invitee's name to remove them from the meeting.

     You can remove all invitees unless you requested the meeting from an Open Activities related list. In that case, the first contact, lead, or person account in the `To` field can't be removed.

   The calendar automatically updates based on the people you added or removed from the meeting.

   Note: If **Close** is the only button on the page, you don't have permission to modify the requested meeting. Either ask the organizer to change the meeting details for you, or contact your Salesforce administrator to grant you the required permissions.
3. Click **Send Update**.
4. Enter a message. For example, you might want to inform your invitees who you're adding or removing from the meeting.
5. Click one of the following:
   - **Send to All Invitees**—Sends an update to all existing and added invitees and a cancellation notice to removed invitees.
   - **Send Only to Changed Invitees**—Sends an update to added invitees and a cancellation notice to removed invitees.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

USER PERMISSIONS

To add and remove invitees from a requested meeting:
- "Edit Events"

  AND

  "Send Email"

Reschedule a Requested Meeting in Salesforce Classic

If you used Cloud Scheduler to request a meeting that hasn't been confirmed, you can reschedule it and propose new times. However, when you confirm a meeting, it's converted to an event, so you can't propose new times. To reschedule an event, edit the event to change its date and send an update to the invitees.

If **Close** is the only button on the page, you don't have permission to modify the requested meeting. Either ask the organizer to change the meeting details for you, or contact your Salesforce administrator to grant you the required permissions.

1. Open your meeting using one of these methods:
   - From the Calendar section on the Home tab, click the **Requested Meetings** subtab and then click the subject of your meeting. If the **Requested Meetings** subtab doesn't display on the Calendar section, ask your administrator to add it.
   - If you requested the meeting from the Open Activities related list for that contact, lead, or person account, click the subject of your meeting in the related list.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

USER PERMISSIONS

To reschedule a meeting:
- "Edit Events"

  AND

  "Send Email"

- From the email notification that you received when an invitee responded to your meeting request, click **View Response and Schedule Meeting**.

2. Click **Reschedule** and propose new times.

   Once the invitees reply to your updated request, you can confirm the meeting.

Confirm a Requested Meeting in Salesforce Classic

After you use Cloud Scheduler to request a meeting, wait for the invitees to reply with the times they can meet. When this happens, you receive an email notification, and the meeting in Salesforce is automatically updated with the times the invitees selected. You can then choose the best time to meet and confirm the meeting.

The meeting confirmation page displays as read-only to coworkers without the "Edit Events" permission and coworkers without the "Edit" permission on the contact or lead record associated with a proposed meeting.

If your administrator added required fields to events, you're prompted to update those fields before the meeting is converted to an event.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

USER PERMISSIONS

To confirm a meeting:
- "Edit Events"

  AND

  "Send Email"

1. Open your meeting using one of these methods:
   - From the Calendar section on the Home tab, click the **Requested Meetings** subtab and then click the subject of your meeting. If the **Requested Meetings** subtab doesn't display on the Calendar section, ask your administrator to add it.
   - If you requested the meeting from the Open Activities related list for that contact, lead, or person account, click the subject of your meeting in the related list.
   - From the email notification that you received when an invitee responded to your meeting request, click **View Response and Schedule Meeting**.

2. Select a time, and click **Confirm**.

   The **Confirm** button displays after you select a meeting time. If you don't select a time, the **Send Update** button displays instead so you can send the invitees a message without confirming a meeting time.

   Use the following tools to help you pick a time:
   - Green check marks show when each invitee can meet.
   - `Free` shows when you are available based on your Salesforce calendar.
   - If none of the times work for the invitees, propose new times and reschedule the meeting.

3. Optionally, enter a message to the invitee.
4. Click **Send** to confirm the meeting.

   Salesforce then:
   - Emails the invitees with the final date and time of the meeting.
   - Converts the requested meeting to a new multi-person event. The last message you sent to the invitees appears in the event's `Description` field, but all other messages between you and the invitees aren't saved.

     This event appears in the Calendar section on the Home tab. If you requested the meeting from an Open Activities related list, the event also appears in the Open Activities related list for that contact, lead, or person account.

Cancel a Requested Meeting in Salesforce Classic

If you used Cloud Scheduler to request a meeting and the meeting hasn't been confirmed, you can cancel the meeting, and Salesforce automatically sends a cancellation notice to the invitees. When you confirm a meeting, then it's converted to an event, which you can delete like any other event.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

USER PERMISSIONS

To cancel a meeting:
- "Edit Events"

  AND

  "Send Email"

1. Open your meeting using one of these methods:
   - From the Calendar section on the Home tab, click the **Requested Meetings** subtab and then click the subject of your meeting. If the **Requested Meetings** subtab doesn't display on the Calendar section, ask your administrator to add it.
   - If you requested the meeting from the Open Activities related list for that contact, lead, or person account, click the subject of your meeting in the related list.
   - From the email notification that you received when an invitee responded to your meeting request, click **View Response and Schedule Meeting**.
2. Click **Cancel Meeting**.

   You can also click **Del** next to the meeting from the Open Activities related list.

   Note: If **Close** is the only button on the page, you don't have permission to modify the requested meeting. Either ask the organizer to change the meeting details for you, or contact your Salesforce administrator to grant you the required permissions.
3. Click **OK** to confirm the cancellation.

   Salesforce emails a meeting cancellation to all invitees. Canceled meetings are permanently removed and aren't stored in the Recycle Bin.

Respond to Event Invitations in Salesforce Classic

Accept or decline an invitation to an event. After you've accepted an invitation, you can add the event to Outlook.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

When a coworker invites you to an event, you receive an email containing a link to the event. The event is also displayed on the Home tab. To accept or decline the event:

1. Click the event description.
2. Optionally, enter a response.
3. If the event is a single event, click **Accept Meeting** or **Decline Meeting**. If you have been invited to a series of events, click **Accept Series** or **Decline Series**.

   Note: If you want to attend some events in a series of events but decline the others, accept the series and then decline specific events.

SEE ALSO:

Create an Outlook Appointment for an Event in Salesforce Classic

Tasks

Keep your to-do list in Salesforce and stay right on top of your deals and accounts. Easily relate every task to records for leads, contacts, campaigns, contracts, and other information that you need. Salesforce gives you different tools to maximize productivity—quick ways to create and update tasks, prefiltered task lists, and task notification options.

IN THIS SECTION:

SEE ALSO:

Activities
Events and Calendars

Manage Tasks

In Salesforce, tasks are a powerful tool to help you track your work and close deals. Relate them to opportunities, leads, accounts, and contacts, and manage them on those records, in lists, and in reports.

IN THIS SECTION:

Manage Tasks in Lightning Experience

Create, update, and monitor your own tasks, tasks delegated to others, and tasks on an opportunity, a lead, an account, or a contact. Use the Home page, the task list, or the activity timeline. You can also track tasks in reports.

- On the Home page, Today's Tasks shows your next five tasks due today.
- On the Kanban Board, opportunities and leads show alerts when a task is overdue or when no open activities exist. To create or update a task, click the yellow triangle.
- On an individual opportunity, lead, account, or contact, use the composer and the activity timeline to create and work with tasks, meetings, calls, and emails.
- Use the task list to work with tasks due today, all your open tasks, overdue tasks, and tasks completed in the past seven days. In the navigation menu, go to **Tasks** and choose a view.

  To keep recently overdue tasks (due in the past 30 days) on your radar but out of your way, **My Tasks** collapses them when they total 10 or more. **All Overdue** includes all overdue tasks. **Delegated** displays tasks that you've created and assigned to people below you in the role hierarchy of your Salesforce org.

  You can also use activities reports to view tasks assigned to people below you in the role hierarchy of your Salesforce org.

EDITIONS

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

USER PERMISSIONS

To create tasks
- "Edit Tasks"

Note: You can remove a contact or a record from a task without deleting the task. For example, suppose that a task is related to Contact A and Contact B, and you want to relate it only to Contact A. Instead of deleting the task, remove Contact B from the `Name` field.

SEE ALSO:

Opportunity Kanban

Considerations for Using Tasks in Lightning Experience

Manage Tasks in Salesforce Classic

You can track, create, and update your own and others' tasks in different locations in Salesforce. Tasks are displayed in activities list views and calendar views; Chatter feeds; and records that tasks are related to, such as contacts and accounts. You can also track tasks in reports.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Database.com**

USER PERMISSIONS

To create tasks
- "Edit Tasks"

Track Tasks

You can track tasks belonging to you and to others in the following locations. To see activities list views, click on the Home tab or any calendar view, or go to the calendar day or week view.

Tasks Assigned to You

- The Home tab, in the My Tasks section
- An activities list view: Choose an existing list view or customize one
- Your Chatter feed: Follow a task to track posts, comments, and updates about it

Tasks Due Soon

- The **My Activities** list view
- **Today** in the Salesforce1 app for iOS or Android
- The Salesforce1 **My Tasks** list

Tasks Related to Another Record, Such as a Contact or an Account

- The other record's detail page, in the Open Activities and Activity History related lists
- Your Chatter feed and in the Chatter feed for the other record
- Activities reports

Note: You can eliminate a contact or a record on a task without deleting the entire task. For example, suppose that a task is related to Contact A and Contact B, and you want to relate it only to Contact A. Rather than deleting the task, remove Contact B from the `Name` field.

Delegated Tasks (Assigned to People below You in Your Organization's Hierarchy)

- The **My Delegated Activities** list view
- Activities reports
- The Salesforce1 **Delegated Tasks** list

Overdue Tasks

- The **Overdue** activities list view
- The Salesforce1 **Overdue Tasks** list

Completed Tasks

- The **My Activities** list view
- The Salesforce1 **Completed Tasks** list

Tasks That You've Assigned to Others

- The **My Delegated Activities** list view
- Activities reports

Tasks Assigned to People below You in Your Organization's Hierarchy

- The **My Team's Activities** list view
- Activities reports

View Task Details

In a calendar, in an activities list view, in a related list, or on the Home tab, there are two ways to see task details:

- Hover your mouse over a task's subject.
- Click the subject.

On a task detail page, to view the details of a single task in a recurring series ( ), select the View Task subtab. To view the details for the series, select the View Series subtab.

Create Tasks

On the Home Tab

On the Home tab, under My Tasks, click **New**.

In a Chatter Feed

If you create a task in the feed for a record such as a contact, Salesforce automatically relates the task to the record.

In the Sidebar

In the sidebar in Salesforce, in the Create New drop-down list, select **Task**.

On the Detail Page of Another Record

- On the Open Activities related list, click **New Task**.
- On the Activity History related list, click **Log a Call** to add a task record with a status of Completed.

Salesforce automatically relates the task to the record.

In a Calendar Day or Week View
Under My Tasks, click **New**.

In an Activity List View ( )
In a list view, click **New Task**.

Update Tasks

Anywhere (except reports) that you can view task details, you can edit any task that you have permission to edit.

Considerations for Using Tasks

Salesforce always displays a task's due date in the time zone you've chosen in My Settings. Your Salesforce admin can add conditions for closing a task, such as requiring you to enter a comment. If your Salesforce admin has set up more than one Closed or Open status for tasks, choose a status to continue. Working with tasks is different in Lightning Experience and Salesforce Classic.

IN THIS SECTION:

Considerations for Using Tasks in Lightning Experience
Be aware of these considerations for owning, viewing, creating, and updating tasks.

Considerations for Using Tasks in Salesforce Classic
Be aware of these considerations for owning, viewing, creating, and updating tasks.

SEE ALSO:

Activity Reminders in Salesforce Classic

Considerations for Using Tasks in Lightning Experience

Be aware of these considerations for owning, viewing, creating, and updating tasks.

EDITIONS

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

Tasks Can Have One Owner at a Time
Only one person can own a task. If you reassign the task to someone else, it no longer appears in your task list, unless the person is below you in the role hierarchy. In that case, you see the task in the Delegated view in your task list.

Managers Can't Edit Others' Tasks
Anyone can reassign a task to a coworker. Managers in the role hierarchy can view tasks that they've assigned to people below them in the role hierarchy. They can also use reports to view tasks of people below them in the role hierarchy, but not to edit them.

No Recurring Tasks
You can't create recurring tasks. However, your task list and the activity timeline display each task that has been created as part of a series in Salesforce Classic. If an individual task is assigned to you, you can edit it.

Limitations on Email Notifications of Task Assignments

Lightning Experience doesn't display an option to send an email when you assign a task. It also doesn't display a setting to receive an email when someone assigns you a task. However, if you switch from Lightning Experience to Salesforce Classic, one of these options can be available. It depends on how your admin has set up your Salesforce org. If one of these options is available, you can receive emails for tasks that you assign to yourself or created with a status of Completed.

No Task Reminders

Lightning Experience doesn't display task reminders.

SEE ALSO:

Considerations for Using Events and Calendars in Lightning Experience

Considerations for Using Activities

Considerations for Using Tasks in Salesforce Classic

Be aware of these considerations for owning, viewing, creating, and updating tasks.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Database.com**

Recurring Tasks ( )

Only the Default Record Type Is Allowed

If you apply a record type other than the default, Salesforce still applies the default record type to your recurring task. Salesforce doesn't display picklist fields associated with the default record type.

No `Due Date` in Recurring Tasks

The `Due Date` field is disabled in recurring tasks because tasks in the series have different due dates.

Effects of Changes to a Task Series and Single Tasks in a Series

Warning: Changes to a series of recurring tasks override changes to single tasks that are due in the future. (Changes to a series don't affect tasks due before the current date.) If you change either of the following settings in a series, links to tasks due in the future break. Ttriggers and workflows are also reset.

- Frequency
- Recurrence start or end date

Task Status

You can't change the status of a task series. You can only change the status of single tasks in a series.

Task Reminders

If you create a recurring task and you leave the reminder checkbox selected, you receive a reminder for each single task in the series.

Attachments to Tasks

You can attach files to a series of recurring tasks. After you create a series, you can add or delete attachments to each single task in the series.

Attachments are displayed on the task detail page only, not on the detail page for other records that the task is related to. If you don't see the Attachments related list on the task detail page, ask your Salesforce admin to add it to the task page layout.

Relating Tasks to Multiple Contacts (Shared Activities)

Maximum Number of Related Contacts

You can relate a task to up to 50 contacts (but only one lead) in the `Name` field, including one primary contact. If you don't see  next to the `Name` field, ask your Salesforce admin to enable Shared Activities.

No Support for Recurring Tasks or Multiple Task Assignees

You can't relate multiple contacts to a recurring task series or a task assigned to multiple users.

Assigning Tasks

Task Is Assigned to User Who Created It

By default, a task is assigned to the person who creates it. To assign independent copies of a new task to multiple people, click  next to **Assigned To**; in the window that opens, click the Multiple Users tab. The `Assigned To` field isn't available in Personal Edition.

Task Notifications

Email Notifications

Depending on the way that your Salesforce admin has configured your Salesforce org, one of the following can happen:

- You automatically receive an email notification for every task assigned to you. You can turn off these notifications by going to the Reminders & Alerts page in your personal settings and deselecting the **Email me when someone assigns me a task** checkbox.
- You don't automatically receive an email notification for every task assigned to you. If you want an email sent to anyone you assign a task to, including yourself, select **Send Email Notification** when you create a task. (Depending on how your Salesforce admin has configured your Salesforce org, this checkbox may be unavailable.)

Mobile Task Notifications

Salesforce1 has separate settings for the task assignment notifications that you receive via your mobile device.

Spell Checking

Not All Languages Supported

If you don't see Spell Checker on the `Comments` field, ask your Salesforce admin to enable it. However, Spell Checker does not support all the languages that Salesforce supports. For example, Spell Checker doesn't support Thai, Russian, and double-byte languages, such as Japanese, Korean, or Chinese.

Tasks in Chatter

New Tasks Appear in Chatter Feeds

If a new task is related to a record such as a lead, an account, or a custom object, the task appears in the feed for that record. On any record that you follow, you see feed items for all tasks, regardless of who created them.

Creating Tasks in Feeds

Your Salesforce admin can specify whether you can use Chatter to create tasks for different types of records. For example, some people can view but not create tasks in the feeds for accounts that they have access to.

No Recurring Tasks in Chatter

Your Chatter feed doesn't display recurring tasks, either in series or singly, and you can't follow recurring tasks in Chatter.

No Email or Call Logging in Case Feeds

On cases, feeds don't include email tasks or call logging tasks.

Email-to-Case

Viewing Associated Emails

If your organization has enabled Email-to-Case or On-Demand Email-to-Case, some tasks are associated with Email-to-Case or On-Demand Email-to-Case emails. Click the link at the top of the task to view the associated email. See Working with Case Emails for more information.

Salesforce for Outlook

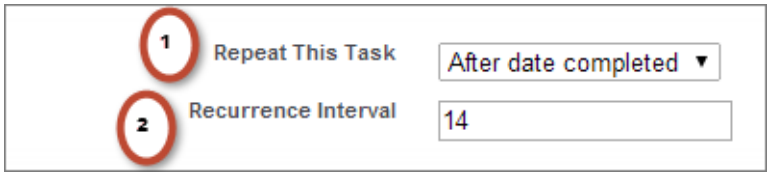
Unresolved Items

If the task is an email that was sent to Salesforce using Email to Salesforce or Salesforce for Outlook, sometimes the email detail page displays a banner with a link to the My Unresolved Items page. Use this page to assign any unassociated emails to related Salesforce records.

Repeat a Task

Easily adjust the due date of a recurring task, or cut the clutter of recurring tasks in your future task list. Use repeating tasks to make a task recur a specified number of days after a trigger that you choose. The next task in the series is created only when the current task is due or marked completed. Repeating tasks are a streamlined alternative to regularly recurring tasks when you don't have to get a task done on a specific day.

If you don't see the repeating tasks option when you create a task, ask your Salesforce admin to add repeating tasks to a page layout.



1. For `Repeat This Task`, select **After due date** or **After date completed**.
2. For `Recurrence Interval`, enter the number of days after the task's due date or completed date when you want the next task to be due.

If `Repeat This Task` on an existing task is set to **(Task closed)**, it indicates that the task was closed as part of a repeating series. You can use this information to distinguish repeating tasks from other tasks for reporting purposes.

If you use Salesforce for Outlook to sync tasks, individual tasks in a repeating series are synced as they're created.

Note: When tasks in a series are set to repeat after their due date, Salesforce doesn't create recurrences that would have been due in the past. Instead, Salesforce keeps adding the interval until a repeated task has a due date in the future. For example, suppose that someone sets a task to repeat three days after it's due but doesn't complete the task until five days after it's due. Instead of creating a task that's already overdue, Salesforce gives the new task a due date of tomorrow.

EDITIONS

Available in Lightning Experience in: **Contact Manager**, **Personal**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in Salesforce Classic in: **All** Editions Except **Database.com**

USER PERMISSIONS

To create tasks:
- "Edit Tasks"

Assign Tasks to Multiple People in Salesforce Classic

Assign up to 100 coworkers an independent copy of the same task. For example, you can create a task "Submit your expense reports" with the appropriate due date and assign it to a team of account executives.

1. On the New Task page, click the lookup icon ( ) next to the `Assigned To` field.
2. In the lookup window, select the **Multiple Users** tab.
3. Add up to 100 people (including members of groups) to Selected Members.

   Tip: Personal groups are a convenient way to organize users into groups that are meaningful to you. For details, see Creating and Editing Groups.

4. Click **Done**.
   The New Task page displays your selections and the total number of tasks next to the `Assigned To` field.
5. Save the task.
   You've now assigned copies of the task to the coworkers you selected. Coworkers can edit, reassign, or delete their individual tasks.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal Edition** and **Database.com**

USER PERMISSIONS

To create tasks:
- "Edit Tasks"

Task Notifications

Set options for sending or receiving an email notification when a task is assigned.

IN THIS SECTION:

Lightning Experience doesn't display an option to send an email when you assign a task. It also doesn't display a setting to receive an email when someone assigns you a task. However, if you switch from Lightning Experience to Salesforce Classic, one of these options can be available. It depends on how your admin has set up your Salesforce org. If one of these options is available, you can receive emails for tasks that you assign to yourself or created with a status of Completed. Ask your Salesforce admin for details.

Salesforce can send an email notification when someone creates or assigns a task, depending on how your Salesforce admin has set up your org.

Task Notifications in Lightning Experience

Lightning Experience doesn't display an option to send an email when you assign a task. It also doesn't display a setting to receive an email when someone assigns you a task. However, if you switch from Lightning Experience to Salesforce Classic, one of these options can be available. It depends on how your admin has set up your Salesforce org. If one of these options is available, you can receive emails for tasks that you assign to yourself or created with a status of Completed. Ask your Salesforce admin for details.

EDITIONS

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

Task Notifications in Salesforce Classic

Salesforce can send an email notification when someone creates or assigns a task, depending on how your Salesforce admin has set up your org.

Ask your Salesforce admin which way task notifications work in your org:

- You can set your own preference for email notifications when someone assigns you a task.
- Someone who assigns you a task can determine whether to send you an email notification of the task.
- You can't receive email notifications when someone assigns you a task.

If you can set your own preference for email notifications when someone assigns you a task, then you receive email notifications by default. If you don't want to receive the email, change the setting:

- In your personal settings, go to **Reminders & Alerts** > **Events and Tasks** and deselect **Email me when someone assigns me a task**.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Database.com**

USER PERMISSIONS

To create tasks
- "Edit Tasks"

Track Your Products, Prices, and Payment Schedules

Products

Products in Salesforce represent the products and services that your company offers to customers.

Products Concepts

Before you use products in Salesforce, make sure that you understand the basics.

Guidelines for Creating Products

If you're an admin or sales operations manager, you'll create products in Salesforce to track the products and services that your company sells. After you create a product, your sales reps can add it to their quotes, opportunities, and orders. Before you get started, review a few key guidelines.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Products Concepts

Before you use products in Salesforce, make sure that you understand the basics.

Products are the items and services that you sell to customers. Each product can exist in multiple price books with different prices.

When you view the detail page of an opportunity, quote, order, or service contract, the Products related list or the Quote Line Items related list shows the associated products for that record. Use these related lists to choose a price book for the record, add or edit products, and, for opportunities, establish or edit product schedules. Use a record's detail page to associate a product with the record. For example, on a quote detail page, click **Add Line Item** on the Quote Line Items related list to select a product to list on the quote.

If products are shared with external contacts via Salesforce to Salesforce, choose one of the list views under Products from Connections to view products that your business partners have shared with you.

SEE ALSO:

Products

Guidelines for Creating Products

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Quotes, orders, and schedules available in Salesforce Classic

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

Guidelines for Creating Products

If you're an admin or sales operations manager, you'll create products in Salesforce to track the products and services that your company sells. After you create a product, your sales reps can add it to their quotes, opportunities, and orders. Before you get started, review a few key guidelines.

- To view and create products, you need the "Read" and "Create" permissions on products.
- To get started creating products, click **New** on the Products home page.
- You can create a product by cloning an existing product.
- To ensure fast system performance with price books, keep the number of products below 2,000,000.
- Products need a standard active price before you can add them to a price book.
- Click **Edit** above the product detail to define a payment and delivery cycle via a product schedule.

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Quotes, orders, and schedules available in: Salesforce Classic

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

Prices and Price Books

Price books track the prices of products and services that your company offers to customers.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Price Books Concepts
Learn about price books and price book entries.

Set and Edit Product Prices
Set and edit prices for each of your company's products and services.

Create Custom Price Books
Create custom price books for each market segment that your sales reps sell to. Then add products to each price book with the prices that you offer each market segment. For example, if you sell to domestic and international customers at different prices, you can create two custom price books: a domestic one and an international one.

Guidelines for Sharing Price Books
Extend access to price books to more of your sales team members through sharing in Salesforce Classic.

Considerations for Removing Price Books
To remove price books from related lists, you can archive, deactivate, or delete the price books. Each removal option has a different result. Before you remove a price book from your related lists, determine which option best fits your business needs.

Considerations for Removing a Product from a Price Book
Before you remove a product from a price book, consider a few key points.

Considerations for Removing Products and Price Books
Review a few key points before you remove a product or a price book.

Price Books Concepts

Learn about price books and price book entries.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

A *price book* is a list of products and their prices.

- The *standard price book* is the master list of all your products and their default *standard prices*. Salesforce creates the standard price book when you start creating product records. It includes all your products and their standard prices regardless of any custom price books that include those products.
- A *custom price book* is a separate list of products with custom prices, called *list prices*. Custom price books are ideal for offering products at different prices to different market segments, regions, or other subsets of your customers. Create a separate price book for each set of customers that you want to address. For example, if you have one set of prices for domestic customers and another for international customers, create a domestic price book and an international one.

A *price book entry* is a product with its price as listed in a price book. Each price book entry specifies a currency for the price.

- *Standard price book entries* are the default (standard) prices for the products and services in the standard price book. When you create a product record, Salesforce creates a standard price book entry. You can mark the standard price book entry as active or inactive, depending, for example, on whether you intend to start selling the product right away.
- *Custom price book entries* are the custom (list) prices for the products and services in your custom price books. Custom price book entries can be created only for products with active standard price book entries.

- In Lightning Experience, Product detail pages display the Standard Price related list and the Price Books related list as a single Price Books related list.
- If you customize the Price Book Entry detail page layout, no field dependencies exist for price book entry fields in the user interface. If the `Use Standard Price` checkbox is removed from the page layout, and this checkbox is selected for a price book entry, you can't edit the list price. The `List Price` field is disabled and can't be enabled on this page.

SEE ALSO:

Prices and Price Books

Set and Edit Product Prices

Set and Edit Product Prices

Set and edit prices for each of your company's products and services.

Set Product Prices in Lightning Experience

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

Set and Edit Product Prices in Salesforce Classic

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

SEE ALSO:

Considerations for Setting Prices

Add and Edit Products on Opportunities

Price Books Concepts

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience	Quotes available in: Salesforce Classic

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

Set Product Prices in Lightning Experience

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

Set Standard Prices in the Standard Price Book

1. Select a product.
2. From the product page, click **Add Standard Price** from the Price Books related list. If you've already added a standard price, click **Edit** from the Show More menu to change it.
3. Enter the new standard price in the `List Price` field.
4. To make this price available to products on opportunities, quotes, or other custom price books, select `Active`.
5. Save your changes.

   The standard price is automatically associated with the product in your standard price book.

Set List Prices in Custom Price Books

1. Select a product.
2. On the product page, click **Add to Price Book** from the Price Books related list.

3. Choose the price book and currency for the new list price, and then click **Next**.
4. Enter the list price. Alternatively, if you want the price in the chosen price book to match the standard price, select `Use Standard Price`.
5. To make this price available to be used when adding the product to opportunities or quotes, select `Active`.
6. Save your changes.

Edit a Price Book Entry

Click **Edit** next to a price book record in any of these locations.

- The price book detail page, in the Products related list
- The product detail page, in the Price Books related list

Set and Edit Product Prices in Salesforce Classic

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

Set Standard Prices

1. Select a product.
2. On the product detail page, click **Add** from the Standard Price related list.

   If you've already added a standard price, click **Edit** to change it or **Edit All** to edit all standard prices in other currencies.
3. Enter the standard price.
4. Select `Active` to make this price available to products on opportunities, quotes, or other custom price books.
5. Save your changes.

   The standard price is automatically associated with the product in your standard price book.

Set List Prices

1. Select a product.
2. On the product detail page, click **Edit** from the Price Books related list next to the custom price book that will contain the list price.

   If you haven't already added the product to a custom price book, click **Add to Price Book** from the Price Books related list.
3. Enter the list price. Alternatively, if both prices are the same, select `Use Standard Price`.
4. Select `Active` to make this price available to products on opportunities or quotes.
5. Save your changes.

Edit a Price

Click **Edit** next to a price book entry record in any of these locations.

- The price book detail page, in the Products related list
- The product detail page, in the Standard Price related list
- The product detail page, in the Price Books related list
- The price book list view

Create Custom Price Books

Create custom price books for each market segment that your sales reps sell to. Then add products to each price book with the prices that you offer each market segment. For example, if you sell to domestic and international customers at different prices, you can create two custom price books: a domestic one and an international one.

1. Review considerations.
2. On the Price Books page, click **New**.
3. Enter a name for your price book.
4. If your Salesforce org uses descriptions, enter one for your price book.
5. Select **Active** to allow sales reps to begin adding the price book or its entries to opportunities or quotes.
6. If you created the custom price book from scratch, leave it empty, populate it with price book entries from another price book, or add new entries.

SEE ALSO:

Price Books Concepts

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Quotes available in Salesforce Classic

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

USER PERMISSIONS

To create or clone price books:

- "Create" on price books

To view price books:

- "Read" on products

  AND

  "Read" in price books

Guidelines for Sharing Price Books

Extend access to price books to more of your sales team members through sharing in Salesforce Classic.

If you're an admin or a user with the "Edit" permission on price books, you can extend sharing of a price book to more users. However, you can't change the sharing model to make it more restrictive than the default.

To view and manage sharing details, click **Sharing** on the price book detail page. The sharing detail page lists the users, groups, roles, and territories that have sharing access to the price book. On this 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 that you created, select it from the `View` drop-down list, and then click **Edit**.
- Click **Add** to grant access to the record for other users, groups, roles, or territories.
- 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.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To share price books:

- "Edit" on price books

Does your sales team want to see prices on the product detail page? If your organization-wide default for price books is "No Access," you can give your entire organization "View Only" access to your standard price book.

Considerations for Removing Price Books

To remove price books from related lists, you can archive, deactivate, or delete the price books. Each removal option has a different result. Before you remove a price book from your related lists, determine which option best fits your business needs.

- Deleting, deactivating, or archiving a custom price book doesn't affect other price books or your product lists. However, these actions can affect your opportunities and quotes. Changing associations with opportunities or quotes is sometimes required before you can remove an associated price book.
- You can deactivate the standard price book, but you can't delete or archive it.

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Quotes available in Salesforce Classic

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

Considerations for Deleting Price Books

- You can't delete a price book while it's in use on opportunities or quotes. If you try to, the system creates a list of the opportunities or quotes that the price book is used on.
- When you delete a price book, you delete all entries in the price book. The deleted price book and its entries are moved to the Recycle Bin. You can restore them for up to 15 days.

Considerations for Deactivating Price Books

- You can activate, deactivate, or reactivate price books at any time by changing the price book's properties.
- You can deactivate a price book even if it's used on an opportunity or quote.
- You can continue to manage entries in your price book while it's deactivated.

Considerations for Archiving Price Books

- You can archive a price book even if it's in use on an opportunity or quote.
- An archived price book is visible, but not accessible, in all associated records.
- Entries in archived price books don't appear in search results.
- You can't recover or delete an archived price book.

SEE ALSO:

Price Books Concepts

Products Concepts

Considerations for Removing a Product from a Price Book

Before you remove a product from a price book, consider a few key points.

- If you remove a product from a price book, all related price book entries are removed.
- If you restore the product from the Recycle Bin, any related price book entries are restored with it.
- If opportunities, quotes, service contracts, or contract line items are associated with a product, you can't remove the product.
- You can't remove a product that's used on an opportunity or quote. If you try to remove it, Salesforce displays a list of the opportunities and quotes. That way, you can remove the product from those opportunities and quotes and try again. If you don't want to remove the product from all opportunities and quotes, you can deactivate (recommended) or archive the product. See Considerations for Removing Products and Price Books.

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Quotes available in Salesforce Classic

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

Considerations for Removing Products and Price Books

Review a few key points before you remove a product or a price book.

- When you remove a product or price book, all related price book entries are removed. However, if several price books contain the same product, removing the product from one price book doesn't affect the other price books. Similarly, if you remove a price book, the products that it contained aren't removed from any other price book.
- To remove a product completely, remove it from the standard price book.
- If opportunities, quotes, service contracts, or contract line items are associated with a product, you can't remove the product.
- You can't remove a product or price book that's associated with an approval process or has a pending workflow action.
- If your product or price book is used on an opportunity, quote, or order, you have three options.
  - Deactivate it by editing it and then deselecting the `Active` field. We recommend deactivating a product or price book that's on an opportunity or quote because it will no longer be available to users. You can reactivate it later. Deactivation doesn't affect the history of an opportunity line item.
  - Remove the related product or price book from all opportunities and quotes. When you try to remove a product or price book that's used on an opportunity or quote, Salesforce displays a list of the opportunities or quotes that use it.
    - If you remove a price book, remove it from each opportunity and quote that's listed.
    - If you remove a product, remove it from each opportunity and quote that uses it.

    Then remove the price book or product.
  - Archive the product or price book and each related price book entry. Use this option with caution. Archived products and price books can't be recovered because they're not stored in the Recycle Bin. Archived products and price books still appear on any opportunities or quotes that contained them before they were archived.

    If you archive a price book, it's still visible in the associated records but not accessible or retrievable.

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Quotes, orders, and schedules available in Salesforce Classic

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

Product Schedules

If you're using Salesforce Classic, you can use *product schedules* to determine the payment and delivery cycles for products that are paid for or delivered over time. (If you're using Lightning Experience, you can still take advantage of product schedules by switching temporarily to Salesforce Classic.)

EDITIONS

Available in: Salesforce Classic

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

Product Schedules Concepts

If you're an admin or sales operations manager, you can create default schedules for products and schedules for individual product line items on opportunities. Start by learning the basics.

Considerations for Using Product Schedules

Consider key points and review examples before you add product schedules or establish schedules on opportunity products.

Add and Edit Product Schedules

Add product schedules to define the payment and delivery cycles of your products.

Establish Schedules for Products on Opportunities

After you add product schedules, use them to set up payments for product sales and realized revenue on opportunities.

Product Schedules Concepts

If you're an admin or sales operations manager, you can create default schedules for products and schedules for individual product line items on opportunities. Start by learning the basics.

EDITIONS

Available in: Salesforce Classic

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

- A *quantity schedule* determines when a product is delivered.
- A *revenue schedule* determines when a product is paid for.
- A *default schedule* is associated with a specific product in a specific price book. Every time the product is added to an opportunity, the default schedule is used. You can override the default schedules on any opportunity.

You determine which types of schedules your Salesforce org can use and which types of schedules can be established for each individual product.

- A quantity schedule is suitable if your customers pay once but receive the product in increments, for example, as with an annual magazine subscription for a monthly magazine. A quantity schedule defines the dates, number of units, and number of installments for payments, shipping, or other use as determined by your company.
- A revenue schedule is suitable if your customers make regular payments but receive the product once, for example, if you sell customized products that are charged in installments but delivered once. A revenue schedule defines the dates, revenue amounts, and number of installments for payments, recognizing revenue, or other use.
- A revenue and quantity schedule is suitable if your customers receive their orders on a delivery schedule and pay for the products using a payment schedule, for example, a monthly product subscription that's paid for monthly.
- A default schedule is suitable if all your customers make product payments on the same timetable or you deliver products on a regular schedule. If you typically customize schedules, there's no advantage to creating default schedules.

SEE ALSO:

Product Schedules

Considerations for Using Product Schedules

Consider key points and review examples before you add product schedules or establish schedules on opportunity products.

EDITIONS

Available in: Salesforce Classic

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

Considerations for Using Default Product Schedules

- If you add or change a product schedule, opportunities with that product aren't updated. If a product has a default quantity schedule and a default revenue schedule, the quantity schedule is calculated first to determine the total product revenue. Then the revenue schedule is applied to that amount.
- If you have a quote line item with a discount, and the corresponding product record has a default schedule, you can't edit the `Discount` field.
- If a product has default schedules established on the product record, the schedules are automatically created when you add the product to the opportunity. The dates of the installments begin with the date that you specified when adding the product. If you didn't specify a product date, the installment dates begin with the opportunity `Close Date`.

Examples of Using Default Product Schedules

- **Default Revenue Schedule Only**: Your ASP company sells yearly contracts of product licenses at $1,200 per license. When a customer buys licenses, the licenses are all "delivered" at one time, but you recognize the revenue monthly. In this case, set a revenue schedule of Schedule Type=Divide, Installment Period=Monthly, and Number of Installments=12.

  With this default revenue schedule, a salesperson sells 200 licenses at a unit price of $1,200 per license per year on an opportunity on March 15. The 200 licenses are all "delivered" on March 15. The total revenue for this product is the quantity of 200 multiplied by the unit price of $1,200 per year, for a total yearly revenue of $240,000. The revenue schedule divides the total revenue into monthly installments of $20,000 on the 15th of every month for the next year.

- **Default Quantity Schedule Only**: Your medical supplies company sells a box of tongue depressors for $10 per box. You normally have yearly contracts with hospitals to deliver boxes monthly. In this case, set a quantity schedule of Schedule Type=Repeat, Installment Period=Monthly, and Number of Installments=12.

  With this default quantity schedule, a salesperson sells 1,000 boxes on an opportunity on January 1. The quantity schedule creates 12 monthly installments of 1,000 boxes each, for a total quantity of 12,000 boxes. The total revenue from this opportunity is calculated using the unit price and the total quantity, so $120,000 is booked on January 1.

- **Default Quantity and Revenue Schedules**: Your manufacturing company sells widgets for $10 each. You normally have yearly contracts to deliver widgets weekly, but your customers pay quarterly. In this case, set a quantity schedule of Schedule Type=Repeat, Installment Period=Weekly, and Number of Installments=52 . Set a revenue schedule of Schedule Type=Divide, Installment Period=Quarterly, and Number of Installments=4.

  With these default schedules, a salesperson sells 2,000 widgets on an opportunity on January 1. The quantity schedule is applied first, and it schedules 2,000 widgets to be delivered every week for a year, for a total quantity of 104,000. The total revenue is calculated using the unit price and the total quantity. The total revenue of $1,040,000 is then divided into quarterly installments of $260,000.

SEE ALSO:

Add and Edit Product Schedules

Add and Edit Product Schedules

Add product schedules to define the payment and delivery cycles of your products.

1. Review considerations and examples.
2. Enable the appropriate schedule types.
3. Select a product from the Products home page.
4. Click **Edit**.
5. Select the type of schedule to create: quantity, revenue, or both. Your choices are limited by your Salesforce org's schedule settings and the schedule types that are enabled for the product.
6. Set the schedule details.
7. Save your changes.
8. To establish a schedule on an opportunity product, see Establish Schedules for Products on Opportunities.
9. To edit a product schedule, click **Edit** on the product detail page.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add or edit product schedules:
- "Edit" on products

SEE ALSO:

Establish Schedules for Products on Opportunities

Set and Edit Product Prices

Establish Schedules for Products on Opportunities

After you add product schedules, use them to set up payments for product sales and realized revenue on opportunities.

1. Review considerations and examples.
2. Make sure that product schedules have been added.
3. Click a product name in the Products related list of an opportunity.
4. Click **Establish** to create a schedule, or click **Re-Establish** to delete the old schedule and create a new one.
5. Select the type of schedule to create: quantity, revenue, or both. Your choices are limited by your Salesforce org's schedule settings and the schedule types that your admin enabled for the product.
6. Set the schedule details.
7. Save your changes.

   Salesforce displays the schedule installments.
8. To edit the installments, click **Edit**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add or edit product schedules:
- "Edit" on opportunities

SEE ALSO:

Product Schedules Concepts

Guidelines for Adding Entitlement Templates to Products

If you're an admin or sales operations manager, follow key guidelines for using the Entitlement Templates related list.

Entitlement templates are predefined terms of customer support that you can quickly add to products. For example, you can create entitlement templates for Web or phone support so that users can easily add entitlements to products offered to customers.

The Entitlement Templates related list displays a product's applicable entitlement templates. Administrators determine an Entitlement Template related list's availability and content.

EDITIONS

Available in: Salesforce Classic

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

- To search for entitlement templates, enter a name, or part of a name, in the text entry field, and then click **Go!**.
- To add entitlement templates to a product, click **Add Entitlement Template**, select the checkboxes next to the templates that you want to add, click **Insert Selected**, and then click **Done**.
- The actions that you can perform on the entitlement template are listed under Action. For example, click **Remove** to remove an entitlement template from the product.
- The name of the template is listed under Entitlement Template. Click to view the template's details.
- The user who created the entitlement template is listed under Created By.

Considerations for Creating and Maintaining Price Books

Before you create a price book, consider a few key points.

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Quotes and orders available in Salesforce Classic

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

- To create a custom price book by cloning an existing price book, click **Clone** on the price book detail page.
- You can delete products from custom price books without affecting the original product listing or its entries in other price books. When you delete a product from the standard price book, the product is still available and active, but its standard price is deleted and removed from all custom price books. If you delete the product from the standard price book, and it's still associated with any custom price books, click **OK** to remove it from all custom price books.
- You can add products, quote line items, or order products from a single price book only.
- To include a product on an opportunity, quote, or order, choose a price book that contains the product. The last price book that you used on an opportunity or quote is selected by default. To select a different price book, click **Choose Price Book** in the Products related list on an opportunity or the Quote Line Items related list on a quote. Choose Price Book appears when you have access to more than one price book. If you have access to more than one price book and the option isn't visible, ask your administrator to add it to your page layout.
- If you change the price book for an opportunity that has products, all products are deleted from the Products related list, but the value in the opportunity's Amount field remains.

SEE ALSO:

Create Custom Price Books

Considerations for Setting Prices

If you're an admin or a sales operations manager, consider key points before you set prices for your products in Salesforce.

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Quotes available in: Salesforce Classic

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

- The following price types are available.
  - A *standard price* is the default price that you associate with a product. It's automatically included in your standard price book.
  - A *list price* is the custom price that you associate with a product in a custom price book. For example, you can maintain one set of prices for domestic orders and another for international orders.
  - *Sales prices* are the actual prices that sales reps specify for the products that they add to opportunities and quotes. Sales prices can be the same as the list prices from the price book that's used for the opportunity or quote, or they can include discounts or other modifications.
- Before you can add a new product to an opportunity, quote, or custom price book, add a standard price to the product, and mark it as active. This pricing is the default pricing of the product.
- Before you can assign list prices for products, create custom price books. List prices are available to use when you add products to an opportunity or quote from a custom price book.
- To represent the price, for example, $100.00, enter `100` or `100.00`, with or without the `$` symbol.
- You can expand the format of your price fields to up to eight decimal places. To change your decimal place settings, contact Salesforce.

Considerations When Using the Salesforce Classic User Interface

- You can add standard or list prices only through the multiline add pages (the Add Standard Price page and the Add List Price page). These pages don't support custom fields. To add standard or list prices and populate custom fields, add the price book entry via the multiline add pages, navigate to the Price Book Entry Edit page for the added record, and then update the custom fields.

  Note: This consideration doesn't affect price book entries that were created or edited by using Data Loader or the API.

- If the price book entry contains required custom fields, you can't create price book entries in the user interface. You can create these price book entries only by using Data Loader or the API.
- You can edit prices in either of the following locations.
  - The multiline edit pages (the Edit Standard Price page and the Edit List Price page)
  - The Price Book Entry Edit page

Building Your Pipeline with Opportunities

Opportunities

Track and manage your potential deals with Salesforce opportunities.

See key details about the deals, including which accounts you're working with, who the players are, and the amounts of the potential sales. As your deals progress toward the Proposal stage:

- Add products and attach files, such as contracts or data sheets.
- Log the calls you make.
- Use Notes to jot down things during customer meetings.
- Create tasks for key activities and calendar events for client meetings.
- Send email to the opportunity contact or other key decision-makers.

During negotiation, share sales strategies with colleagues or to ask your manager for targeted guidance using Chatter. As you drive your deal from one stage to the next, update the opportunity record with the current stage. You'll be closing deals in no time.

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

SEE ALSO:

Work With Opportunities

Understand How Opportunities Work

Opportunity Fields

Work With Opportunities

Use opportunities to track and manage your pipeline so you can close deals faster. Move deals to the next stage, add products, and more.

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:

Move an Opportunity to the Next Stage

Update your deal as it moves closer to closing. Accurate stage information is important for forecasting, reporting, and ultimately meeting your quota.

Add and Edit Products on Opportunities

Track what's selling and in what quantity by adding products to opportunities. Then make sure that you maintain accurate records by updating the quantities and prices of the products.

Schedule Reminders to Update Opportunities

To ensure your team is keeping their opportunities up to date, create an automated email that contains a report of your team's open opportunities and send it to your direct reports.

SEE ALSO:

Opportunities

Move an Opportunity to the Next Stage

Update your deal as it moves closer to closing. Accurate stage information is important for forecasting, reporting, and ultimately meeting your quota.

IN THIS SECTION:

Move an Opportunity to the Next Stage in Salesforce Lightning Experience
Update your opportunity stage directly from its record or from the Opportunity Kanban view.

Move an Opportunity to the Next Stage in Salesforce Classic
Track opportunity progress as you get closer to closing your deal.

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

Move an Opportunity to the Next Stage in Salesforce Lightning Experience

Update your opportunity stage directly from its record or from the Opportunity Kanban view.

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

- From an open opportunity, select the new stage on the Sales Path and then click **Mark as Current**.
- From an open opportunity, click **Mark Stage as Complete**.
- From the Opportunity Kanban view, find the opportunity whose stage you want to update and drag its card to the next stage column.

SEE ALSO:

Opportunity Kanban

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To create opportunities:
- "Create" on Opportunities

To view opportunities:
- "View" on Opportunities

Move an Opportunity to the Next Stage in Salesforce Classic

Track opportunity progress as you get closer to closing your deal.

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

1. Edit the opportunity record you want to update.
2. Select the new stage.
3. Save the record.

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 create opportunities:
- "Create" on Opportunities

To view opportunities:
- "View" on Opportunities

Add and Edit Products on Opportunities

Track what's selling and in what quantity by adding products to opportunities. Then make sure that you maintain accurate records by updating the quantities and prices of the products.

1. Navigate to the opportunity that you want to edit.
2. From the Products related list, either click **Edit** next to the product you want to modify or click **Add Product** to add a new product. If you're adding the first product, choose a price book for the opportunity.
3. When adding a new product, select one or more products from the list, or search for a product.
4. Enter the attributes for each product. Admins can customize this page to include fields that are specific to your business.
5. Enter the `Sales Price` for the product. The sales price defaults to the list price that's specified in the price book that's assigned to the opportunity. Depending on your user permissions, you can override this value.
6. If the product has a discount, type the discount as a number with or without the percent sign (%) in the `Discount` field. If the `Discount` field isn't available, check with your administrator.
7. Enter the number of products at this price in the `Quantity` box.

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Schedules available in Salesforce Classic

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

USER PERMISSIONS

To add or edit opportunity products:
- "Edit" on opportunities

  AND

  "Read" on products and price books

8. Save your changes.

SEE ALSO:

Considerations for Adding Products to Opportunities

Opportunity Product Fields

Products

Schedule Reminders to Update Opportunities

To ensure your team is keeping their opportunities up to date, create an automated email that contains a report of your team's open opportunities and send it to your direct reports.

For example, you can schedule a weekly report of all the opportunities for the current fiscal quarter owned by anyone on the team and have the report distributed to everyone on the team.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

1. Make sure that opportunity update reminders are enabled.
2. From your personal settings, enter *Reminder* in the Quick Find box, then select **My Update Reminder**.
3. Check Active if you want reminders to start after you save the settings.
4. Enter a name and address for the sender of the reminders.
5. Choose a recipients option.
6. Enter any other recipients in the CC field. Separate email addresses with commas, semi-colons, spaces, or new lines.
7. Enter a subject and message to be included in the email reminders.
8. Select a schedule frequency.
9. Select Include Past Due Opportunities to include all open opportunities that have a closing date within 90 days before the specified Close Date.

   For example, suppose that your organization uses a normal fiscal year and the current quarter started on 4/1/2012. You configure update reminders for opportunities closing in the current quarter and then select Include Past Due Opportunities. When the update reminder is sent on 6/15, it includes all opportunities from 4/1 to 6/15. It also includes open opportunities with a closing date between 1/2 and 4/1 (there are 91 days in Q1).
10. Choose a Close Date to include opportunities with dates within that range.
11. Select the fields to include in the email reminders.

Field	Description
Last Login Date	Most recent login date of the opportunity owner
# of Open Opportunities	Total number of opportunities in the report
# Not Updated in Last 30 Days	Total number of opportunities that have not been updated in 30 days
Open Opportunity Amount	Total of all opportunity amounts in report
Total Closed Amount	Total closed amount for all opportunities in report. If your organization uses multiple currencies, this amount is converted to the user's currency. If your organization uses

Field	Description
	advanced currency management, the conversion is done using dated exchange rates.
`Last Update Date`	Most recent date the opportunity owner submitted a forecast. If your organization uses multiple currencies, this amount is converted to the user's currency. If your organization uses advanced currency management, the conversion is done using dated exchange rates.

12. Click **Save**.

When there are no records in an opportunity update reminder, Salesforce doesn't send an email. If no email is sent for three consecutive opportunity update reminders, the scheduled reminder is deactivated.

Understand How Opportunities Work

Understand these key concepts so you can use opportunities more effectively throughout Salesforce.

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:

Opportunity Kanban

The Opportunity Kanban is a visual summary of all the opportunities for a particular sales path. By seeing all opportunities at once, sales managers can effectively monitor the pipeline and sales reps can keep deals moving forward.

Opportunity Field History

Field History lets you track the changes made to an opportunity, including changes to the stage, so you can quickly see who changed the opportunity and when.

Guidelines and Considerations for Using Opportunities

To take full advantage of Opportunities, you should understand these guidelines and considerations.

SEE ALSO:

Opportunities

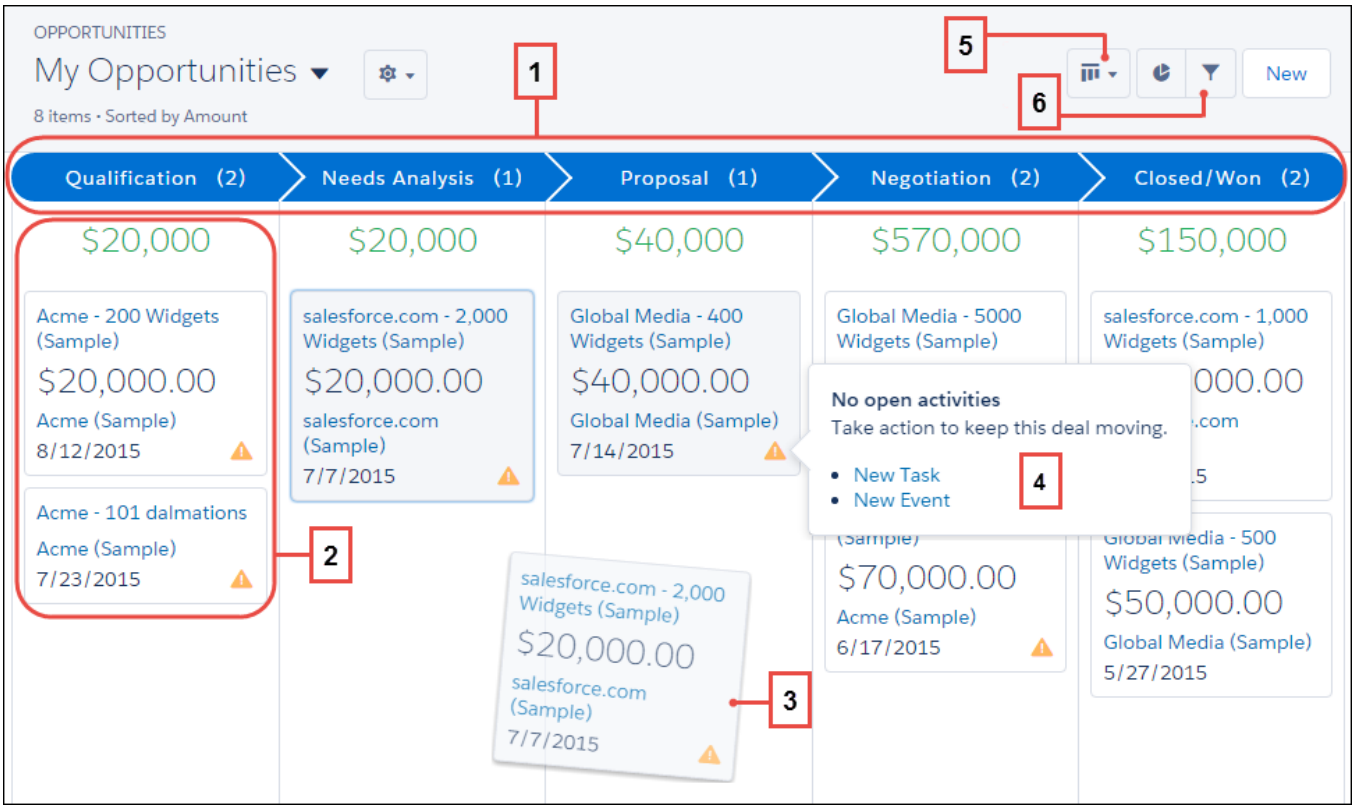
Opportunity Kanban

The Opportunity Kanban is a visual summary of all the opportunities for a particular sales path. By seeing all opportunities at once, sales managers can effectively monitor the pipeline and sales reps can keep deals moving forward.

EDITIONS

Available in: Lightning Experience

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



The Opportunity Kanban board displays opportunities from a particular sales path (1). The opportunities are sorted by stage and include the sum of the all opportunities for that stage. The fields shown on the card are the first four fields on the corresponding list view (2). Easily move an opportunity by dragging the card to the next stage (3). Alerts tell how to keep a deal on track; for example, create a task or event on an opportunity that doesn't have any open activities (4). You can then create an activity without navigating away from this view. Easily toggle between board view and grid view (5) and quickly filter the view (6) to see a specific set of opportunities.

There are a few things to consider when using the Opportunity Kanban. For more information, see the Lightning Experience guide.

SEE ALSO:

Move an Opportunity to the Next Stage in Salesforce Lightning Experience

Understand How Opportunities Work

Opportunity Field History

Field History lets you track the changes made to an opportunity, including changes to the stage, so you can quickly see who changed the opportunity and when.

There are two related lists that track changes to the fields on an opportunity record.

Opportunity Field History
Any time a user modifies any of the standard or custom opportunity fields that are set to be tracked, a new entry is added to the Opportunity Field History related list. All entries include details of the change and who made it. Your administrator can choose which fields to track.

Stage History
Any time a user changes the `Amount`, `Probability`, `Stage`, or `Close Date` fields, a new entry is added to the Stage History related list. All entries include details of the change and who made it. Your administrator can't choose which fields to track.

Changes to the `Amount` and `Quantity` fields are tracked even when the field is updated as the result of a change to an opportunity's products or schedules.

SEE ALSO:

Understand How Opportunities Work

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

USER PERMISSIONS

To view opportunities:
- "Read" on opportunities

Guidelines and Considerations for Using Opportunities

To take full advantage of Opportunities, you should understand these guidelines and considerations.

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:

Guidelines for Creating Opportunities
Many of your organization's opportunities may be generated when you convert qualified leads, but you can also create opportunities manually in both Salesforce Classic and Lightning Experience.

Considerations for Deleting Opportunities
Before you delete Salesforce opportunities, make sure you're familiar with these considerations.

Considerations for Cloning Opportunities
Cloning an opportunity quickly creates a new opportunity with the same information as the existing on. Before you clone Salesforce opportunities, make sure you're familiar with these considerations.

Considerations for Sharing Opportunities
By sharing your opportunities with other user you give visibility into your pipeline so others can provide you with important information to help you close your deals. Before you share your opportunities, make sure you're aware of these considerations.

Guidelines for Finding Similar Opportunities
Close your deals faster by taking advantage of the rich information contained in successfully closed deals that are similar to yours. Here are some guidelines to help you find the opportunities that will help you close your deals.

Considerations for Adding Products to Opportunities

If you're an admin or sales operations manager, consider key concepts before you add products to opportunities.

Guidelines for Creating Opportunities

Many of your organization's opportunities may be generated when you convert qualified leads, but you can also create opportunities manually in both Salesforce Classic and Lightning Experience.

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

Contacts and Contact Roles

- To associate an opportunity with an account or contact, you must have at least read access to the account or contact.
- In Salesforce Classic, when you create an opportunity from a contact record, that contact is automatically listed as the primary contact in the Contact Roles related list of the opportunity. In Lightning Experience, when you create an opportunity from a contact record, you're prompted to assign a contact role to that contact.

Divisions

If your organization uses Divisions, the division of a new opportunity is automatically set to the division of the related account.

Forecasts

- In Professional, Enterprise, Unlimited, Performance, and Developer Editions, opportunities you create are automatically given the forecast category that corresponds to the opportunity stage you assign. Your administrator correlates opportunity stages and forecast categories when editing the `Stage` picklist values.
- If the opportunity is set to close in a given month, as determined by the `Close Date`, the opportunity is automatically added to the forecast for that particular month, unless the forecast category on the opportunity is set to *`Omitted`*.

Multicurrency

If your organization uses multiple currencies, your opportunity amounts are initially shown in your personal currency. Change the `Opportunity Currency` picklist to track the sales revenue in another currency.

Opportunity Splits (available in Salesforce Classic)

When team selling and splits that total 100% are enabled, you're automatically added to the opportunity team and initially assigned 100% of the split.

Territory Management

If your organization uses territory management, opportunities that you create are automatically assigned a territory when both of the following conditions are met.

- You belong to or have edit privileges on the same territory as the account on the opportunity.
- You have no other territories in common with that account. (Note that if you have the "Manage Territories" permission, you have access to all territories, including the parent territories of the account. In this case, you *do* have other territories in common with the account, unless the account is only assigned to a single top-level territory. No territory is assigned to the opportunity.)

Considerations for Deleting Opportunities

Before you delete Salesforce opportunities, make sure you're familiar with these considerations.

- You can delete an opportunity if you're an administrator, the opportunity owner, or a user above the opportunity owner in the organization role hierarchy, and you have the "Delete" permission on opportunities.
- When you delete an opportunity, all related notes, attachments, quotes, quote line items, quote PDF files, events and tasks, partner relationships, competitor strengths/weaknesses, contact roles, and stage history are deleted.
- The deleted opportunity is moved to the Recycle Bin and can be restored. If you restore the opportunity, any related items are also restored.
- Associated contacts and accounts are not deleted with the opportunity.

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

Considerations for Cloning Opportunities

Cloning an opportunity quickly creates a new opportunity with the same information as the existing on. Before you clone Salesforce opportunities, make sure you're familiar with these considerations.

- If you have read-only access to a field, the value of that field isn't included in the cloned opportunity.
- If the opportunity has an associated opportunity team, the team isn't included in the cloned opportunity. You'll need to add the opportunity team to the cloned opportunity.
- If the opportunity has any associated products that contain unique custom fields, you must delete the values in the custom fields before cloning the opportunity.

Note: If you have read-only access to a field, the value of that field is not carried over to the cloned record.

SEE ALSO:

Opportunity Fields

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

Considerations for Sharing Opportunities

By sharing your opportunities with other user you give visibility into your pipeline so others can provide you with important information to help you close your deals. Before you share your opportunities, make sure you're aware of these considerations.

- Your administrator determines your organization's sharing model, including the default opportunity access levels for territories.
- While you can increase access to your opportunities, you can't restrict it below your organization's default access levels.
- To share an opportunity with another user, that user must have the "Read" permission on opportunities.
- The sharing detail page lists the users, groups, roles, and territories that have sharing access to the opportunity.

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

Guidelines for Finding Similar Opportunities

Close your deals faster by taking advantage of the rich information contained in successfully closed deals that are similar to yours. Here are some guidelines to help you find the opportunities that will help you close your deals.

- Use the Similar Opportunities related list on the opportunity's detail page to find Closed/Won opportunities with common information.
- The criteria used to find similar opportunities is determined by your administrator. The search finds a maximum of 10,000 opportunities with close dates in a three-month period and displays up to 300 of the records that best match the search criteria. The results are ranked by the number of matching fields.
- Results can be filtered by Close date or by matching fields.
- To see how a record in the search results is similar to your current deal, hover over the opportunity name The matching fields are highlighted in the Match Criteria sidebar.

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

Considerations for Adding Products to Opportunities

If you're an admin or sales operations manager, consider key concepts before you add products to opportunities.

- The opportunity `Amount` is the sum of the products that you add to the opportunity. You can't edit the `Amount` unless you delete the products from the opportunity.
- The total price is the quantity multiplied by the sales price.
- If you're using Salesforce Classic and the product has default schedules, Salesforce creates the schedules when you add the product to the opportunity.
- For multicurrency orgs, the opportunity `Currency` is tied to the currency of the associated price book entry. You can't edit the `Currency` unless you delete the products from the opportunity.

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Schedules available in Salesforce Classic

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

Opportunity Fields

The fields for opportunities contain a wide variety of information to help you track your pending and potential sales. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

The available fields vary according to which Salesforce Edition you have.

Field	Description
`Account Name`	Name of account that opportunity is linked to. You can enter the account name, or select the account using the lookup icon. If you change the account for an opportunity that has partners, all partners are deleted from the Partners related list.
`Amount`	Estimated total sale amount. For organizations using multiple currencies, the amount is shown in your personal currency by default. Change the `Opportunity Currency` picklist to track the amount in another currency. For opportunities with products, the amount is the sum of the related products. You cannot directly edit the amount unless the opportunity has no products. To change the amount for an opportunity that contains products, edit the sales price or quantity of the related products. If you change the price book for an opportunity that has products, all products are deleted from the Products related list, but the value in the opportunity's Amount field remains.
`Close Date`	Date when you plan to close the opportunity. You can enter a date, or choose a date from the calendar that displays when you put your cursor in the field. Opportunities with a `Close Date` in a given month will tally in the forecast for that month, unless you assign them to the Omitted category while editing the forecast. When you set an open opportunity's `Stage` to a type of "Closed/Won," the `Close Date` is set to the current date in Coordinated Universal Time (UTC). At certain times of day, UTC will differ by one day from your time zone.
`Contract`	Contract that the opportunity is linked to.
`Created By`	User who created the opportunity including creation date and time. (Read only)

Field	Description
`Custom Links`	Listing of custom links for opportunities as set up by your administrator. Available only in Salesforce Classic.
`Description`	Description of the opportunity. Up to 32KB of data are allowed. Only the first 255 characters display in reports.
`Expected Revenue`	Calculated revenue based on the `Amount` and `Probability` fields.
`Forecast Category`	Forecast category name that is displayed in reports, opportunity detail and edit pages, opportunity searches, and opportunity list views. The setting for an opportunity is tied to its `Stage`. For more information on forecast categories, see Working with Forecast Categories on page 346.
`Last Modified By`	User who last changed the opportunity fields, including modification date and time. This does not track changes that are made to any of the related list items on the opportunity. (Read only)
`Lead Source`	Source of the opportunity, for example, Advertisement, Partner, or Web. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
`Next Step`	Description of next task in closing opportunity. Up to 255 characters are allowed in this field.
`Opportunity Currency`	The default currency for all currency amount fields in the opportunity. Amounts are displayed in the opportunity currency, and are also converted to the user's personal currency. Available only for organizations that use multiple currencies. For opportunities with products, the currency is tied to the currency of the associated price book. You cannot directly edit this field unless you first delete the products.
`Opportunity Division`	Division to which the opportunity belongs. This value is automatically inherited from the related account. Available only in organizations that use divisions to segment their data.
`Opportunity Name`	Name of the opportunity, for example, Acme.com - Office Equipment Order. Up to 120 characters are allowed in this field.
`Opportunity Owner`	Assigned owner of opportunity. Not available in Personal Edition.
`Opportunity Record Type`	Name of the field that determines what picklist values are available for the record. The record type may be associated with a sales process. Available in Enterprise, Unlimited, Performance, and Developer Editions.

Field	Description
`Partner Account`	Read-only field that indicates the opportunity is owned by a partner user.
`Primary Campaign Source`	Name of the campaign responsible for generating the opportunity. For opportunities created during lead conversion, this field is automatically filled in with the campaign name from the lead. If the lead has multiple associated campaigns, the campaign with the most recently updated member status is inserted into the opportunity. For opportunities with multiple influential campaigns, click **Edit** next the primary campaign in the Campaign Influence related list on the opportunity detail page and select the `Primary Campaign Source` checkbox. The campaign will display in the `Primary Campaign Source` field on the opportunity.
`Private`	Indicates that the opportunity is private. Only the record owner, users above that role in the hierarchy, and administrators can view, edit, and report on private opportunities. Not available in Group or Personal Editions. Private opportunities do not trigger Big Deal Alerts or workflow rules. Private opportunities count towards your forecasts only if you have Customizable Forecasting or Collaborative Forecasts enabled. Users with the "View All Forecasts" permission can see private opportunities within the Forecasts tab. Note: When you mark opportunities *`Private`*, any opportunity teams, opportunity splits, and sharing are removed. (The owner of a private opportunity receives 100% of split types that total that amount.)
`Probability`	Likelihood that opportunity will close, stated as a percentage. The `Probability` value is always updated by a change in the `Stage` value, even if `Probability` is marked as read only on your page layout. Users with access to edit this field can override the value.
`Quantity`	Total of all `Quantity` field values for all products in the Products related list if the opportunity has products. General use field if the opportunity does not have products.
`Stage`	Current stage of opportunity based on selections you make from a predefined list, for example, Prospect or Proposal. Entry is selected from a picklist of up to 100 available values, which are set by an administrator. Each picklist value can have up to 40 characters. Your administrator correlates the values in this picklist with Forecast Category values that determine how the opportunity contributes to your forecast.

Field	Description
	When you set an open opportunity's `Stage` to a type of "Closed/Won," the `Close Date` is set to the current date in Coordinated Universal Time (UTC). At certain times of day, UTC will differ by one day from your time zone.
`Synced Quote`	Quote that's synced to the opportunity. Only one quote can sync to the opportunity at a time.
`Territory`	Territory with which the opportunity is associated. Only available if your organization has territory management.
`Type`	Type of opportunity, for example, Existing Business or New Business. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.

SEE ALSO:

Opportunity Product Fields

Opportunities

Opportunity Product Fields

The fields for opportunity products contain information to help you track what's selling. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

The available fields vary according to which Salesforce Edition you have.

Field	Description
`Active`	Whether the price book entry (product and list price) is active and can be added to an opportunity or quote.
`Created By`	Name of the user who created the product.
`Date`	Close date of a particular opportunity product.
`Discount`	Discount for the product as a percentage.
`Last Modified By`	User who last changed the opportunity product fields. (Read only)
`Line Description`	Text to distinguish this opportunity product from another.
`List Price`	The price of the product within the price book, including currency.
`Opportunity`	Name of the opportunity for this opportunity product.

Field	Description
Product	Item listed in the Products related list on an opportunity.
Product	The product's name.
Quantity	Number of units for the opportunity product.
Sales Price	Price for the products in the opportunity product.
Subtotal	Difference between standard and discounted pricing. Converted currency amounts when the opportunity's currency is different from the user's currency.
Total Price	Sum of all the product amounts for this opportunity product.

SEE ALSO:

Opportunity Fields

Opportunities

Teaming Up for Sales Opportunities

Opportunity Teams

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Avoid duplicate opportunity records created by each member of a sales team. Instead, create an Opportunity Team so that all the members of a team can access the same record. Enabling Opportunity Splits also lets you use opportunity splitting to share credit among team members.

An Opportunity Team is a set of Salesforce users who work together on sales opportunities. A typical opportunity team might include an account manager, a sales representative, and a presales consultant.

Set up an Opportunity Team for any opportunity owned by you or a team member below you in the role hierarchy. Add team members and select each person's role on the opportunity (for example, "Executive Sponsor"). Most important, specify each team member's level of access to the opportunity: read/write access or read-only access. Adding, editing, or deleting Opportunity Team members requires read/write access on the associated opportunity. You can't use Opportunity Teams for private opportunities, and you can't add high-volume portal users to teams.

You can set up a default Opportunity Team. Include the users you normally work with on your opportunities. You have the option to add your default Opportunity Team to all of your opportunities automatically.

Changes made to the Opportunity Team for an individual opportunity don't affect your default Opportunity Team or the Opportunity Teams on your other opportunities.

You can filter custom opportunity list views by the Opportunity Teams to which you belong. When creating or editing a custom list view for opportunities, select the My Opportunity Teams filter to see your opportunity teams. In opportunity reports, you can filter opportunities by the opportunity teams in which you are a member.

SEE ALSO:

Add Members to an Opportunity Team

Setting Your Default Opportunity Team

Opportunity Teams List View

The opportunity teams list view displays information about opportunity team members.

From the list view you can:

- Click the alphabetical index links to filter your search results by first letter.
- Edit a team member.
- Delete a team member.
- Click the team member name to view member details or clone a team member.

SEE ALSO:

Opportunity Teams

EDITIONS

Available in: Salesforce Classic

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

Add Members to an Opportunity Team

You can add team members to an opportunity you own, giving them access to the information they need to help you close the sale.

1. Open the opportunity and navigate to the Opportunity Team related list, then click **Add** or **Add Team Member**—whichever appears.
2. Enter the member's name in the `User` column, or select a member's name. If the partner portal is enabled, choose whether the member is a Partner User or User, and then enter the member's name.

   When you add an opportunity team member, the member is automatically granted read access to the associated account.
3. Select the member's opportunity team role.
4. Select the member's opportunity access level. The access level can't be less than your organization's default opportunity sharing access.
5. Specify values for any custom fields that your administrator has created for opportunity teams.
6. Click **Save**.

Tip: Run the Opportunities with Opportunity Teams report to list the opportunity team members for the opportunities owned by you or users below you in the role hierarchy. The report also shows information about opportunities you own and opportunity teams to which you belong, including any opportunity splits.

SEE ALSO:

Opportunity Team Fields

Create Opportunity Splits

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add team members to an opportunity:

- "Read" on users

  AND

  Read" on opportunities

  AND

  Owner of opportunity record, or above owner in your organization's role hierarchy

To view an opportunity for which you're a team member:

- "Read" on the opportunity

Editing Members of an Opportunity Team

Change the access level, team role, and more for members of an opportunity team.

1. Open the opportunity and navigate to the Opportunity Team related list.
2. If the team member you're updating doesn't appear, view the full list.
3. Select **Edit** next to the member's name.

   Note: Inactive users with assigned split percentages appear on the opportunity team, but you can edit only split-related fields for these users. All other fields are read only.

4. Select a different access level or role. The access level can't be less than your organization's default opportunity sharing access.
5. Edit values for any custom fields that your administrator has created for opportunity teams.

   Important: See Working with Custom Fields for Opportunity Teams on page 263.

6. Click **Save**.
7. To view the organization-wide sharing settings for opportunities, click **Display Access**. These settings may allow greater access than those specified for an opportunity team member. For example, if the organization sharing setting for opportunities is Read/Write, it overrides a Read Only setting assigned to an individual opportunity team member.

Tip: Run the Opportunities with Opportunity Teams report to list the opportunity team members for the opportunities owned by you or users below you in the role hierarchy. The report also shows information about opportunities you own and opportunity teams to which you belong, including any opportunity splits.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit team members:

- "Edit" on opportunities

  AND

  Owner of opportunity record, or above owner in your organization's role hierarchy

To view an opportunity for which you're a team member:

- "Read" on the opportunity

SEE ALSO:

Opportunity Team Fields

Deleting Members from an Opportunity Team

1. View the opportunity and navigate to the Opportunity Team related list. Or open any other page to which you administrator has added this list.
2. Delete members no longer on the team. (If there are more than five members, click **Go to list** to list the entire team.)

If Opportunity Splits is enabled, keep these guidelines in mind.

- If the team member you want to delete is assigned a split percentage greater than zero, you must reassign the split before you can delete the team member.
- You can't delete the opportunity owner from the opportunity team. If you want to remove this member from splits calculations, either assign them a split percentage of zero, or transfer ownership of the opportunity.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To remove team members:

- "Read" on users

  AND

  Edit" on opportunities

To view an opportunity for which you're a team member:

- "Read" on the opportunity

Working with Custom Fields for Opportunity Teams

You can see custom fields for your opportunity teams if your administrator has defined them and added them to the relevant page layouts.

If your administrator has defined custom fields but not added them to the Add Opportunity Team Members page, you can't see them when you add a new team member. However, you might see them when you edit an existing opportunity team member by clicking **Edit** beside the member's name on the Opportunity Team related list.

It's important to remember that when you edit a member's details, the member's original details are overwritten. Let's say you add a member to the team and then edit that member's details to specify values for all associated custom fields. Later, you mistakenly think that the member hasn't been added to the team, perhaps because you don't look at the Opportunity Teams list view, and add the member again. Because the custom fields aren't displayed on the Add Opportunity Team Members page, when you add the member for a second time, you can't specify the values for these fields. In this case, the original values that you specified for the custom fields are overwritten with a blank value.

EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

Add Members to an Opportunity Team

Editing Members of an Opportunity Team

Setting Your Default Opportunity Team

An opportunity team is a group of users that typically work together on opportunities. For example, the opportunity team may include the account manager, the sales engineer, and the sales representative. Your default opportunity team should include the users that you normally work with on the opportunities that you own. You can specify the role that each user plays on your team and the specific access that each user should have to your opportunities.

SEE ALSO:

Opportunity Teams

Add Your Default Opportunity Team

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set default opportunity team:

- "Read" on opportunities

Add Your Default Opportunity Team

Save time by automatically adding a default opportunity team to opportunities you own.

- When adding members to your default opportunity team, you can choose to automatically add the team to all of your open opportunities.
- You can add your default opportunity team to each of your opportunities individually.
  1. View the opportunity and navigate to the Opportunity Team related list.
  2. Click **Add Default Team**.

Note: Administrators and users above you in the role hierarchy can add your default opportunity team to opportunities you own. Clicking **Add Default Team** adds the default team of the opportunity owner, not of the user who clicks the button.

SEE ALSO:

Opportunity Teams

Setting Your Default Opportunity Team

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up default opportunity teams:

- "Read" on opportunities

To add default opportunity teams to opportunities:

- "Read" on opportunities

  AND

  Owner of opportunity record, or above owner in your organization's role hierarchy

Opportunity Team Fields

Field	Description
`Opportunity Access`	The level of access that a team member has to the opportunity. The access level can be read/write or read only, but it can't be less than your organization's default opportunity sharing access.
`Team Role`	The role that the team member plays for the opportunity, for example, "Account Manager."
`User`	The user listed as part of the team. If the partner portal is enabled, choose whether the team member is a Partner User or User.

EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

Add Members to an Opportunity Team

Opportunity Splits Overview

Opportunity splitting lets team members share sales credit for an opportunity. Multiple team members working on an opportunity can roll their individual sales credits into quota and pipeline reports for the entire team.

Note: To view and edit splits, you must be the opportunity owner or above in the organization hierarchy and have access to the split fields.

There are two types of opportunity splits.

- To credit team members who are directly responsible for opportunity revenue, use splits that total 100% of the opportunity amount. (These splits are called *Revenue* splits by default.)
- To credit supporting team members, use splits that can total any percentage of the opportunity amount, including percentages over 100%. (These splits are called *Overlay* splits by default.)

EDITIONS

Available in: Salesforce Classic

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

By default, your organization's `Opportunity—Amount` field comes with one revenue split and one overlay split . If custom split types are enabled for your organization, your administrator can create up to three more split types, for a total of five split types. Your administrator decides whether each split must total 100%.

For example, split credit for an opportunity on the standard `Estimated Revenue` field. Or add a currency field for profit and create a split type based on profit from an opportunity. Split types can be based on most opportunity currency fields, including custom fields and roll-up summary fields, but not formula currency fields.

To have custom split types enabled for your organization, contact Salesforce.

Your administrator can also create custom fields for opportunity splits, allowing you to better track and store information about splits you create for team members.

Note: You can't create dependent picklists for opportunity splits.

Tip: To include splits in your forecasts, see Changing Between Revenue and Quantity Forecasts. (Splits can't be rolled up to sales territories.)

Create Opportunity Splits

Add and adjust splits for opportunity team members.

If team selling and opportunity splits are enabled for your organization, you can edit splits for opportunity team members.

1. Open an existing opportunity or create a new one. The opportunity owner is automatically included in the opportunity team and initially assigned 100% of the split types that must total that amount.
2. In the Opportunity Split related list, click **Edit Opportunity Splits**.

   Note: If you don't see splits on a specific field, ask your administrator if field-level security limits your access.

3. Add appropriate opportunity team members and adjust their split percentages. To determine whether a split type must add up to 100%, look for for "must total 100%" in the description of the split.

   To remove a team member from the split, click ⊗ next to the team member's name.

   Note: If you can't add a team member, go back to the main opportunity page and add the person in the Opportunity Team related list. (To add members while editing splits, contact your administrator.)

4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add splits for opportunity team members:

- "Edit" on opportunities

  AND

  Owner of opportunity record, or above owner in organization hierarchy

Note: Split percentages are limited to two decimal places. If you enter a monetary amount that requires a split percentage with three decimal places or more, the amount is automatically rounded.

Knowing Your Competitors

Competitors Overview

You can track competitors in a pending sale by listing the competitors' names in the opportunity. You can enter the names of new competitors, or choose from a list of competitors defined by your administrator. To access this information, go to the Competitors related list of the opportunity.

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

Viewing and Editing Competitors

The Competitors related list of an opportunity shows the competitors for that deal.

- To view information for a competitor, click the competitor's name.
- Click **Edit** next to a competitor's name to edit the strengths and weaknesses of the competitor for the opportunity.
- To add a competitor, click **New**. Enter the competitor's name, or click the lookup icon to select from a list of competitors defined by your administrator. It does not need to be an existing account or contact. Then specify the strengths and weaknesses of the competitor, which may be different for each opportunity.

Note: To add or create a competitor on an opportunity, you must also have access to edit that opportunity.

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 view competitors:
- "Read" on opportunities

To edit competitors:
- "Edit" on opportunities

Improve Your Performance With Work.com

Feedback Overview

USER PERMISSIONS

To view feedback:	"Read" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests AND "Read" on Performance Cycles
To create feedback:	"Create" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests AND "Read" on Performance Cycles
To edit or submit feedback:	"Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests AND

EDITIONS

Available in: Salesforce Classic

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

Feedback 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**.

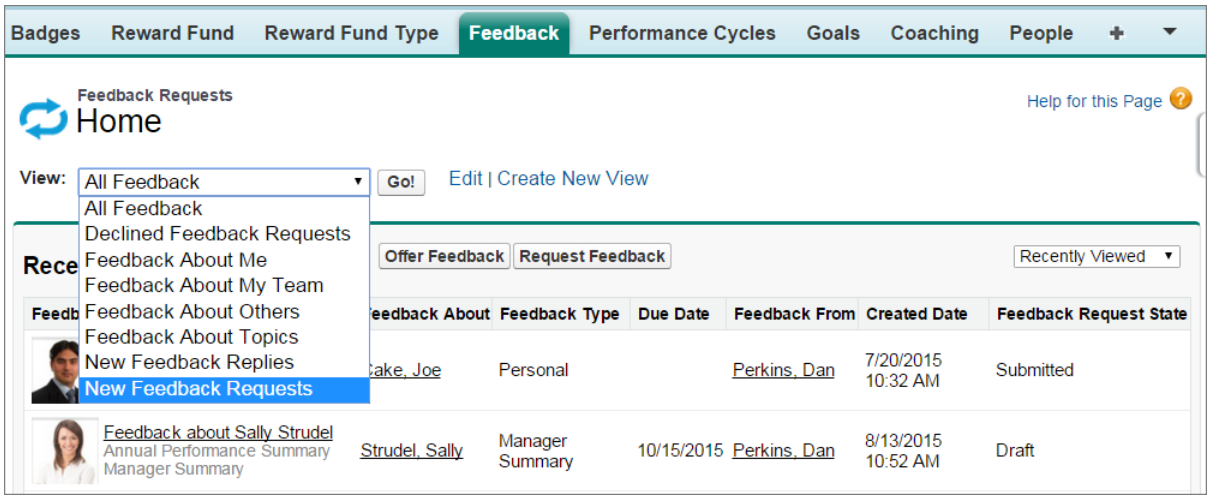
	"Read" on Performance Cycles
To delete feedback (only for admin users with MAD/VAD permissions):	"Delete" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests AND "Read" on Performance Cycles

Work.com Feedback allows you to request and offer unsolicited feedback on a person or topic, and also respond to feedback related to performance summaries.

Feedback offers, feedback requests, and feedback related to performance summaries are all managed from the Feedback tab. The Feedback tab displays the recent feedback you've viewed by default, and you can filter to see different types of feedback records. For example, select **New Feedback Requests** to see feedback records that require their input. You can also create custom list views with different filter options.

The default feedback filters include:

- All Feedback—All feedback, including one-time feedback and performance summary feedback
- Declined Feedback Requests—All the feedback you've requested that others have declined
- Feedback About Me—All the completed feedback about you
- Feedback About My Team—All the completed feedback about your team
- Feedback About Others—Completed feedback about others
- Feedback About Topics—Completed feedback about topics
- New Feedback Replies—New replies to the feedback you've requested
- New Feedback Requests—New feedback requests for one-time feedback and performance summaries



On the feedback page, you can:

- View and filter your feedback list for new requests, replies, and other feedback
- Click a feedback record to view and edit details about the feedback

- Offer or request feedback

SEE ALSO:

Feedback Visibility

Performance Summary Overview

Feedback Visibility

Visibility options are based on the type of feedback you choose.

EDITIONS

Available in: Salesforce Classic

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

Feedback 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**.

Feedback Requested

Only people to whom you sent the feedback request and an administrator with "Modify All Data" or "View All Data" access can view your request.

Feedback Requested About	Person Receiving the Request	Person's Manager	Administrator with MAD/VAD Access
Topic	✅		✅
Myself	✅		✅
Another User	✅		✅

Feedback Offered

You can only view feedback that is shared with you. For example, you won't be able to view feedback about yourself that was shared only with your manager.

Feedback Offered	Person	Person's Manager	Administrator with MAD/VAD Access
Person Only	✅		✅
Person and Manager	✅	✅	✅
Manager Only		✅	✅

SEE ALSO:

Feedback Overview

Performance Summary Overview

Work.com performance summaries gather feedback about people in your company via a custom questionnaire.

Use the Feedback tab to view the performance summaries you need to complete. Use the drop-down menu to filter your performance summaries and other feedback. Select **New Feedback Requests** to see one-time feedback and performance summaries that require your input.

SEE ALSO:

Add Peers to a Performance Summary
Complete a Summary
Decline a Performance Summary Request

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**.

USER PERMISSIONS

To view the Performance tab:

- "Read" on Performance Cycles

To view performance summaries:

- "Read" on Performance Cycles

To create performance summaries:

- "Create" on Performance Cycles

To answer and submit performance summaries:

- "Create," "Read," and "Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests

  AND

  "Read" on Performance Cycles

Complete a Summary

1. On the Feedback tab, select **New Feedback Requests** from the feedback drop-down list.
2. Click **Go!**.
3. Select a performance summary.
4. Answer the questions in the summary. If available, click **Invite Peer** or **Invite Skip Level** to request reviews from others.

   To see recent work, such as thanks, goals, metrics, and feedback, click **Customize Related Lists** on a performance summary's detail page. You can't quote recent work directly in your responses, but you can manually add this information.

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**.

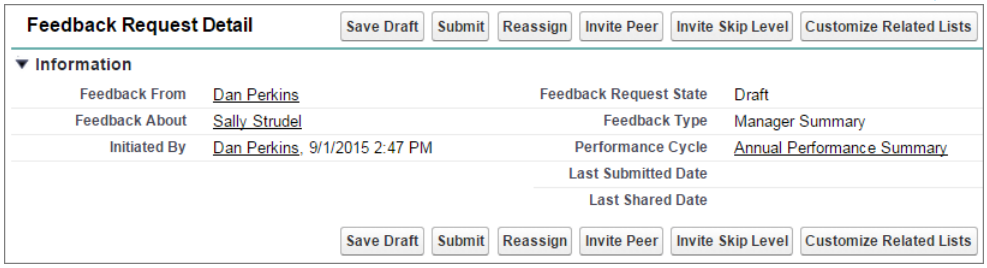
USER PERMISSIONS

To edit performance summaries:

- "Create," "Read," and "Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests

  AND

  "Read" on Performance Cycles



5. When you're finished writing the summary, click **Submit** or click **Save Draft** to make changes at a later time.

You can view submitted summaries using filters on the Feedback tab, including summaries about you or your team.

SEE ALSO:

Performance Summary Overview

Add Peers to a Performance Summary

Decline a Performance Summary Request

Add Peers to a Performance Summary

Invite peers to review your performance summary.

1. On the Feedback tab, select **New Feedback Requests** from the feedback drop-down list.
2. Click **Go!**.
3. Select a performance summary.
4. If peer or skip reviews are included, at the top of the page, click **Invite Peer** or **Invite Skip Level**.
5. Type the name of the person you would like to invite and click **Save**.
   The person's name appears in the list of invited people and they receive an email that asks them to complete a peer or skip level summary.

SEE ALSO:

Performance Summary Overview

Complete a Summary

Decline a Performance Summary Request

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**.

USER PERMISSIONS

To view performance summaries:

- "Read" on Performance Cycles

To add peers to performance summaries:

- "Create," "Read," and "Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests

  AND

  "Read" on Performance Cycles

Decline a Performance Summary Request

Decline a performance summary request when feedback on that person or team is no longer required.

1. On the Feedback tab, select **New Feedback Requests** from the feedback drop-down list.
2. Click **Go!**.
3. Select a performance summary.
4. Click **Decline**.
5. Click **OK** on the confirmation message.
   - You can only decline self, peer, and skip-level summaries.
   - Saved answers are preserved and remain in the declined summary.
   - Declined summaries can be found on the Feedback page with the All Feedback filter.
   - Click **Reopen** from a declined summary's detail page to reopen the summary. Reopened summaries appear in the New Feedback Requests list.
   - After a performance cycle "Finishes," declined summaries can't be reopened.

SEE ALSO:

Performance Summary Overview
Add Peers to a Performance Summary
Complete a Summary

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**.

USER PERMISSIONS

To view the Performance tab:

- "Read" on Performance Cycles

To edit Performance Summaries:

- "Create," "Read," and "Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests

  AND

  "Read" on Performance Cycles

Goals Overview

Work.com Goals allow you to define, track, and measure your work. Access goals via the Goals tab or Chatter profile pages.

The Goals tab on a user's profile displays the goals for that person. The top-level Goals tab is a general list view that can be configured to display different lists of goals (such as My Goals, My Team's Goals, or Key Company Goals). The tabs and list views that appear may vary depending on how your administrator configured Work.com.

Click a goal in your list view to access the detail page.

Goals support Chatter feeds on goal records, so different users can collaborate in the feed and keep up-to-date on a goal's progress.

The goal detail page lists the metrics, tasks, events, notes, attachments, and other information related to a particular goal. Align goals with others by linking your goals with parent goals or subgoals.

Modify sharing settings to better control who can see and update your goals. For example, if goals in your organization are set to private by default, goal owners and administrators can share goals with select users or groups to increase collaboration and visibility. Choose between read-only and read/write access for more granular control over goal access.

On the Open Activities related list, click **New Task** or **New Event** to create a task or event tied to a specific goal. You can also create tasks or events for individual metrics, if desired.

Add metrics to your goals to calculate your progress. You can also link metrics to data in your favorite reports to keep track of your work in Salesforce. Assign weights to different metrics to precisely track the completion of the goal.

SEE ALSO:

- Create a Goal
- Metrics
- Coaching Overview
- Considerations for Using Tasks
- Considerations for Using Events and Calendars
- Metrics

EDITIONS

Available in: Salesforce Classic

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

Goals requires a **Work.com** license, 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 goals:
- "Read" on Goals and Goal Links

To create goals:
- "Create" on Goals and Goal Links

To edit goals:
- "Edit" on Goals and Goal Links

To delete goals:
- "Delete" on Goals and Goal Links

Create a Goal

Define, track, and measure your work with Work.com Goals.

1. Click the top-level Goals tab.

   If the Goals 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**.

3. Enter a name for the goal, and specify additional details.

   You can adjust a goal's sharing settings after it's created. Note that all goal images are externally available.

   Tip: To create a key company goal, select the **Key Company Goal** field. After the goal is created, click **Sharing** on the goal's detail page and share it with the All Internal Users group. Set the Access Level to Read Only to share it with the rest of your organization, or set it to Read/Write to allow everyone to collaborate on the goal.

4. Set the goal's status:

   - Draft—The goal details are in draft state and haven't been finalized yet.
   - Published—The goal details have been finalized and the goal is in progress.
   - Completed—The goal is completed.
   - Canceled—The goal is canceled and no longer applies.
   - Not Completed—The goal is not completed.

5. Click **Save**.

You can reassign goals to other users by clicking **Change** next to Owner Name on a goal's detail page. Metrics can be owned by different users, so be sure to reassign metrics to the appropriate owner as well.

SEE ALSO:

Goals Overview

Metrics

EDITIONS

Available in: Salesforce Classic

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

Goals requires a **Work.com** license, 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 goals:

- "Read" on Goals and Goal Links

To create goals:

- "Create" on Goals and Goal Links

Metrics

Use metrics to track and surface your data.

Create new metrics from the Metrics tab or from a goal detail page. Users can create standalone metrics or tie them to specific goals.

Use Progress or Completion metrics to track the status of different goals that you set for yourself or others. Anyone with read/write access can refresh metric values, and metrics can also appear in relevant coaching spaces and performance summaries.

Anyone with read/write access can refresh metric values, and metrics can also appear in relevant coaching spaces and performance summaries.

IN THIS SECTION:

SEE ALSO:

Create a Metric
Goals Overview
Goals Overview
Create a Goal

EDITIONS

Available in: Salesforce Classic

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

Metrics requires a **Work.com** license, which is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

Create a Metric

Track and surface your work with Work.com Metrics.

1. Click the Metrics tab.

   Alternatively, you can click **New Metric** on a goal's detail page.

2. Click **New**.
3. Select a Progress or Completion record type and click **Continue**.
   - Progress metrics measure achievement based on how much is finished compared to a targeted value. They're ideal for tracking hard numbers and percentages. For example, create progress metrics to `Convert 50 Leads` or `Achieve 100% Customer Satisfaction`.
   - Completion metrics measure whether the metric was completed or not. They're ideal for tracking milestones or when you don't have metrics based on hard numbers. For example, create a completion metric to `Become Salesforce Certified`.
4. Enter a name for the metric and specify additional details.
5. For Progress metrics, enter a target value.

   You can update the current value manually or link it to a Salesforce report. To a link a metric value to a report:

   a. In the Current Value field, click **From a Salesforce report**.

   b. Select the Report Name.

   c. Select the Summary Field.

6. Set the metric's status.
7. Click **Save**.

SEE ALSO:

Metrics

Goals Overview

EDITIONS

Available in: Salesforce Classic

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

Metrics requires a **Work.com** license, 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 metrics:
- "Read" on Metrics

To create metrics:
- "Create" on Metrics

To link metrics to reports:
- "Create" on Metric Data Links

Recognition Overview

Recognize and thank your coworkers by posting custom messages, badges, and rewards to their Chatter feed.

Work.com Recognition includes Thanks with unlimited custom badges and the ability to tie badges to tangible rewards such as gift cards. Managers can create reports and dashboards to view data on Recognition leaders. In addition to the required user permissions, your administrator must enable Thanks and Rewards for your organization. Depending on how your administrator configured Work.com, the Recognition tab and Badges tab may appear as top-level tabs. Additionally, the Recognition tab may appear as a subtab on your Chatter profile.

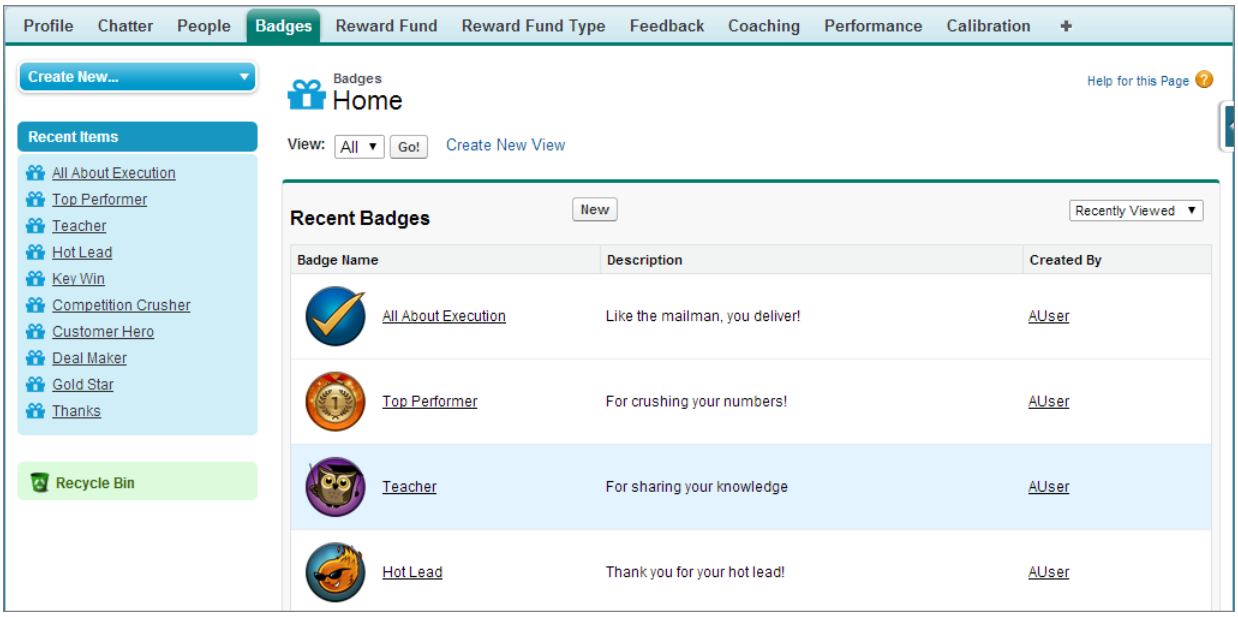
Note: Users can create, edit, share, and give thanks badges without a Work.com license. However, users will still need a Work.com license to use badges tied to rewards. For more information about obtaining Work.com, contact Salesforce.

EDITIONS

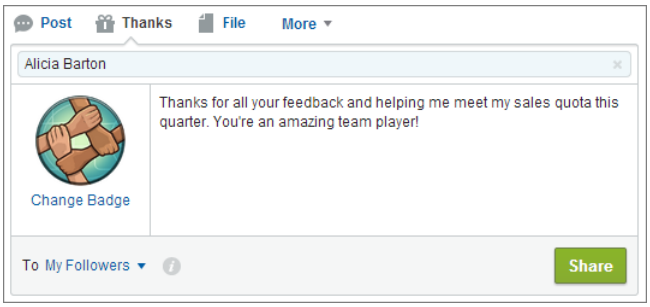
Available in: Salesforce Classic

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

Rewards features 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**.



Access the library of available badges from the Badges tab. Click **New** to create a badge, or click a badge to see or edit badge details. You can only view the badges you have permission to give, and your ability to create or edit badges may be limited depending on how your feature is configured.



Give thanks badges from the Chatter publisher. Users are currently limited to giving badges to one user at a time. For more information, see Give Thanks to Your Coworkers.

View the badges a user has received on the Recognition tab of their Chatter profile.

SEE ALSO:

- Create a Badge
- Configure Access to Thanks Badges
- Reward Funds
- Create Reward Funds

Create a Badge

Create custom badges to uniquely recognize and thank your coworkers.

Walk Through It: Create a Thanks Badge

1. Click the Badges tab.

   If the Badges tab isn't displayed, click + to the right of your current tabs and select it from the All Tabs page.

2. Click **New**.

3. Enter a name and description for the badge, add a badge image, and optionally assign rewards and badge limits.

   Note:

   - Only users with Rewards enabled can create a Rewards badge.
   - Badges can't be transferred from a sandbox organization to a production organization.
   - You can limit access to badge records with the Access related list, but badge images are externally available.

Badge Field	Description
Badge Name	The name of the badge.
Active	Indicates that the badge is active and available to give. This setting is enabled by default.
Reward Fund	Select a reward fund for this badge, if applicable.
Owner Name	The name of the badge owner.
Company Badge	Select to make this badge a company badge. Only users with the Chatter moderator permission can create and edit company badges. Company badges enable all users to give the badge.
Description	A description that explains the significance of the badge.
Image URL	A visual representation of the badge. Click the image field to select a picture from a directory on your computer. Badge images are stored at 128 x 128 pixels and are externally available.
Limit Number	The number of badges that are available. This can be per user or across all users. The default value is unlimited badges.
Limit Start Date	Indicates when the system begins to count the number of badges used. The default value is the date the badge is created.

EDITIONS

Available in: Salesforce Classic

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

Rewards features 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**.

USER PERMISSIONS

To view the Badges tab:

- No additional user permission needed

To 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.

Badge Field	Description
Limit Type	Select Per User to have Limit Number apply to each user. Select Per Company to have Limit Number apply to the entire organization.

4. Click **Save**.

Access for custom badges is set to all internal users by default. To change the access to a custom badge, go to the badge detail page and click **Edit List** on the Access related list.

SEE ALSO:

Recognition Overview

Configure Access to Thanks Badges

Reward Funds

Configure Access to Thanks Badges

Configure access to a thanks badge using its Access related list.

1. From the **Badges** tab, click the badge you'd like to modify.

   If you don't see the Badges tab, click + to the right of your current tabs and select it from the All Tabs page.

2. Under the Access related list, click **Edit List**.
3. Enter the public groups or users you want to grant access to.

   You can only grant access to users with supported licenses.

4. Click **Save**.

SEE ALSO:

Recognition Overview

Create a Badge

Reward Funds

EDITIONS

Available in: Salesforce Classic

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

Rewards features 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**.

Reward Funds

Work.com Rewards allow you to tie tangible rewards to your badges. You can attach badges to tangible rewards from most digital gift codes globally.

Your administrator must enable Thanks and Rewards in your organization.

Work.com Rewards supports your choice of rewards programs or brands in addition to the default Amazon.com™ reward fund type. Reward information is stored in two objects, Reward Fund Type and Reward Fund. Here's a quick introduction to the differences between the two.

Reward Fund Type

This object holds the fixed information about a reward such as the currency type, redemption information, and CSV file upload details. Examples include Amazon.com™, iTunes™, or Starbucks™.

Reward Fund

This object holds the gifts codes and can only be tied to a single reward fund type. Each reward fund has a set value that you determine by purchasing gift codes for the specific denomination.

For example, a reward fund called Q1 US Rewards may contain codes linked to Amazon.com gift cards worth $100 each. Another reward fund called Q1 Customer Service Rewards may contain codes linked to Amazon.com gift cards worth $20 each. These reward funds would be related to the same reward fund type. However, a reward fund linked to Starbucks gift cards would be related to a different reward fund type.

You can create reward badges in three steps.

1. Create a reward fund type or use the default Amazon.com reward fund type.
2. Create a reward fund and upload reward codes.
3. Tie a thanks badge to a reward fund.

SEE ALSO:

Recognition Overview

Create Reward Fund Types

Create Reward Funds

Create a Badge

EDITIONS

Available in: Salesforce Classic

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

Rewards features 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**.

USER PERMISSIONS

To view Reward Funds:

- "Read" on Reward Funds

To create Reward Funds:

- "Create" on Rewards

  "Create" on Reward Funds

Create Reward Fund Types

Use reward fund types to specify general reward information, such as currency codes, redemption information, and CSV file upload details.

1. Click the Reward Fund Type tab.

   If the Reward Fund Type tab isn't available, click + to the right of your current tabs and select it from the All Tabs page.

2. Click **New**.
3. Enter the Reward Fund Type details.

Information

Field	Description
Reward Fund Type Name	The name of the reward fund type. Try to pick something descriptive, like Amazon.CA (Canada) or Starbucks (US).
Credit System	Select Gift Codes to tie your rewards to a cash reward. Select Points if the reward is not tied to cash. Reward Fund Types that use Points ignore the Currency Code field.
Active	Whether the reward fund type is active or not.
Owner Name	The owner of the reward fund type.
Currency Code	The type of currency.
Predefined	Read-only setting that indicates if a reward fund type is predefined, like the default Amazon.com type. You can't change the name, credit system, or currency code on predefined reward fund types. Predefined fund types are system-generated and can't be edited.

Redemption

Field	Description
Redemption Url	The URL where the reward is redeemed. This field is optional based on the type of reward code. For reward codes that are links, do not enter a redemption URL.
Redemption Information	The instructions for redeeming the reward, including any extra steps the user may need to take to redeem the reward.
Terms and Disclaimer	Extra legal information about the reward fund type.

Upload Configuration

Field	Description
Reward Code Column	The column in a CSV file that specifies the reward codes. The upload uses the second column by default. Enter a number to specify a different column.

EDITIONS

Available in: Salesforce Classic

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

Rewards features 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**.

USER PERMISSIONS

To view Reward Fund Types:
- "Read" on Reward Fund Types

To create Reward Fund Types:
- "Create" on Reward Fund Types

  "Read" and "Create" on Reward Funds

  "Read" and "Create" on Rewards

Upload Configuration

Field	Description
Reward Value Column	The column in a CSV file that specifies the reward values. The upload uses the third column by default. Enter a number to specify a different column.

4. Click **Save**.

SEE ALSO:

Reward Funds

Create Reward Funds

Create a Badge

Recognition Overview

Create Reward Funds

Use reward funds to hold the gift codes related to a reward fund type.

Users can build reward badges from the reward funds they created. Reward funds can include Amazon.com™ gift cards purchased from one of our third-party vendors, such as TangoCard™, or different rewards programs beyond Amazon.com.

1. Click the Reward Fund tab.

   If the Reward Fund tab isn't available, click + to the right of your current tabs and select it from the All Tabs page.

2. Click **New**.
3. Name your fund, select the Reward Fund Type, and enter the reward value.
4. Click **Save**.
5. Upload or enter your gift codes.
   - To upload gift codes through a CSV file, select **Upload CSV**, then select **Choose File**. Select a CSV file and click **Upload**.

     By default, the upload uses the second column for reward codes and the third column for reward values. However, you can set these to different values on the related reward fund type. Here's an example of how you might format your CSV file:

	A	B	C
1	Sequence Number	Reward Code	Reward Value
2	1	1111-222222-3333	10
3	2	1111-222222-4444	10
4	3	1111-222222-5555	10
5	4	1111-222222-6666	10
6	5	1111-222222-7777	10

EDITIONS

Available in: Salesforce Classic

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

Rewards features 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**.

USER PERMISSIONS

To view Reward Funds:
- "Read" on Reward Funds

To create Reward Funds:
- "Create" on Reward Funds

  "Create" on Rewards

Note: Make sure the reward code data begins on the second row of the CSV file. The first row is seen as the header row and is not uploaded.

- To manually enter gift codes, select **New Reward**. Enter the gift code and click **Save**.

SEE ALSO:

Recognition Overview

Reward Funds

Create Reward Fund Types

Create a Badge

Recognition Overview

Skills Overview

Skills allow users to share information about their professional expertise. With skills, users can discover, collaborate with, and endorse others based on their knowledge.

The Skills feature makes it easier to identify experts in different areas. Users can add or remove skills on their Chatter profile page or on record detail pages, and other users can endorse those skills. Use the global search bar to search for experts with specific skills.

EDITIONS

Available in: Salesforce Classic

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

IN THIS SECTION:

Add a Skill Via Record Detail Pages

Add skills to share your professional expertise.

Remove a Skill Via Record Detail Pages

Remove a skill if it no longer applies.

Endorse a Skill Via Record Detail Pages

Endorse a user's skill to promote their expertise in a specific area.

SEE ALSO:

Add a Skill Via Record Detail Pages

Add a Skill Via Record Detail Pages

Add skills to share your professional expertise.

If the skill already exists, use the global search bar to find the skill, and click **Add to My Profile** on the skill record.

1. From your personal settings, enter `Advanced User Details` in the `Quick Find` box, then select **Advanced User Details**. No results? Enter `Personal Information` in the `Quick Find` box, then select **Personal Information**.
2. In the User Skills related list, click **New Skill**.
3. Enter the name of your skill and an optional description.
4. Click **Save**.
   The skill is created.
5. Click **Add To My Profile**.
6. Click **Save**.
   The skill is associated with you.

You can also add skills on Chatter profile pages.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add skills:

- "Create" on Skills and Skill Users

SEE ALSO:

Skills Overview

Remove a Skill Via Record Detail Pages

Endorse a Skill Via Record Detail Pages

Remove a Skill Via Record Detail Pages

Remove a skill if it no longer applies.

1. From your personal settings, enter `Advanced User Details` in the `Quick Find` box, then select **Advanced User Details**. No results? Enter `Personal Information` in the `Quick Find` box, then select **Personal Information**.
2. In the User Skills section, click **Del** next to the skill you want to remove.
3. Click **OK**.

The skill is no longer associated with you, but it's not deleted. Only skill owners with the proper permissions and users with "Modify All Data" can delete skills.

You can also remove skills on Chatter profile pages.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To remove skills:

- "Read" on Skills

  AND

  "Delete" on Skill Users

SEE ALSO:

Skills Overview

Add a Skill Via Record Detail Pages

Endorse a Skill Via Record Detail Pages

Endorse a Skill Via Record Detail Pages

Endorse a user's skill to promote their expertise in a specific area.

1. Go to the profile page of the user you'd like to endorse.
2. Click in the upper right corner and select **User Detail**.
3. In the User Skills section, click the Skill User Name or Endorsements link next to the skill you'd like to endorse.
4. Click **Add Endorsement**.
5. Click **Save**.

You can also endorse skills on Chatter profile pages.

SEE ALSO:

Skills Overview

Add a Skill Via Record Detail Pages

Remove a Skill Via Record Detail Pages

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add endorsements to skills:

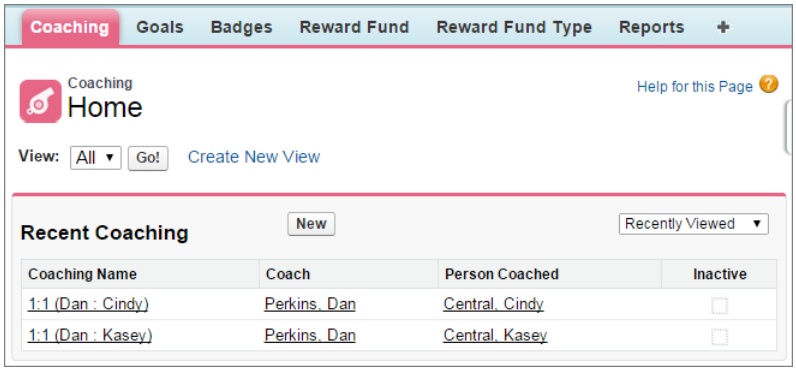
- "Create" on Endorsements

  AND

  "Read" on Skills and Skill Users

Coaching Overview

With Work.com Coaching, you can privately coach or be coached by anyone in your company. You can also share coaching spaces to include additional observers and participants. Access Coaching via the Coaching tab or your profile page.



On the coaching page you can:

- View a list of your coaching spaces.

  You should create your own filters (such as My Coaches, People I Coach, and Inactive Relationships) that are suitable for your organization.

- Click **New** to create a coaching space. You can have as many coaching spaces as you want.

Click a coaching space in your list view to access the detail page.

EDITIONS

Available in: Salesforce Classic

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

Coaching requires a **Work.com** license, 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 coaching spaces:

- "Read" on Coaching

To create coaching spaces:

- "Create" on Coaching

From this page you can:

- Click **Show Feed** to see the feed related to a coaching space.

  Your administrator must enable Chatter feed tracking to display the feed.
- Access the goals, metrics, activities, notes, and attachments related to a particular coaching space.
- Set coaching spaces to inactive when they're no longer useful. This retains the record history, and the coaching space can also be reactivated anytime.
- Delete coaching spaces if you have the right access level.

SEE ALSO:

Goals Overview

Considerations for Using Tasks

Considerations for Using Events and Calendars

Configure Work.com Email Settings

Enable Work.com email to receive notifications related to your Work.com feedback and rewards.

1. From your personal settings, enter `Work.com` in the `Quick Find` box, then select **Email Settings** under Work.com.
2. In the General section, select **Receive emails**.

   You can deselect this option at any time, if you no longer want to receive any Work.com emails.
3. In the Personal section, select which type of emails you want to receive.

Email Setting	Description
Someone gives me a reward	Select this option, if you want to receive an email when someone gives you a reward.
I am asked for a feedback, or receive feedback to a question I've asked	Select this option, if you want to receive an email when someone asks for your feedback or someone answers a question you asked.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To configure email settings:

- No additional permissions required

4. Click **Save**.

Creating Quotes and Documenting Contracts

Quotes

Quotes in Salesforce represent the proposed prices of your company's products and services. You create a quote from an opportunity and its products. Each opportunity can have multiple associated quotes, and any one of them can be synced with the opportunity. When a quote and an opportunity are synced, any change to line items in the quote syncs with products on the opportunity, and vice versa.

EDITIONS

Available in: Salesforce Classic

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

IN THIS SECTION:

SEE ALSO:

Opportunities

Create and Manage Quotes

Create quotes to show your customers the prices of the products and services that you offer. You can create a set of quotes to show different combinations of products, discounts, and quantities so customers can compare prices. Then manage your quotes to keep them up-to-date.

1. Click **New Quote** on the Quotes related list on an opportunity. The `Subtotal`, `Discount`, `Total Price`, and `Grand Total` fields show values from the opportunity.
2. Complete the fields.
3. Save your changes.
   - A unique quote number is added.
   - Products on the opportunity are copied to the quote as line items.
   - The grand total is recalculated based on the taxes and shipping information that you entered.

To add a line item to a quote:

1. Click **Add Line Item** in the Quote Line Items related list.
2. If no price book was selected on the opportunity, select a price book for the quote. Otherwise, the quote uses the opportunity's price book.
3. Enter search criteria in the lookup to locate a line item.
4. Select the products that you want to add, and then click **Select**.
5. Complete the fields. The sales price defaults to the product's list price as recorded in the price book. Depending on your permissions, you can edit the sales price.
6. Save your changes.

   The line items are added to the Quote Line Items related list. The grand total in the detail section is the sum of the related line items. The discount is the average discount for the line items.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view quotes:
- "Read" on Quotes

To create quotes:
- "Create" on Quotes

To add quote line items:
- "Edit" on Quotes

  AND

  "Read" on Products and Price Books

SEE ALSO:

Considerations for Creating and Managing Quotes and Quote Line Items

Create and Email Quote PDFs

Sync Quotes and Opportunities

Link a quote to the opportunity that it was created from. That way, updates to one record are always reflected in the other.

1. Open the quote that you want to sync, and then click **Start Sync**.
2. Click **Continue**, **Sync**, and then **Done**.

   The quote and the opportunity are now synced. The opportunity's `Synced Quote` field and Quotes related list identify the quote that's currently synced.
3. To stop syncing between a quote and an opportunity, open the synced quote, and then click **Stop Sync**.

   Updates are no longer synced between the records.
4. To sync a different quote with an opportunity, follow the steps for syncing a quote.

   The previously synced quote stops syncing, and the new quote starts.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To sync quotes:
- "Create" on quotes

SEE ALSO:

How Quote Syncing Works

Troubleshooting Quote Syncing

Create and Email Quote PDFs

Provide quotes to your customers the easy way: via PDF. Create quote PDFs from a standard template or from your company's design. Then email your quote directly from the preview page for customer approval.

Create a Quote PDF from the Standard Template

If you haven't created custom templates or generated PDFs, start from the standard template.

1. On the quote detail page, click **Create PDF** to generate a preview.
2. Click **Save to Quote** to save the PDF to the Quote PDFs related list. The PDF name is the quote name plus a version number, such as *`AcmeQuote_V1`*.

Create a Quote PDF by Selecting a Template

If you've created a PDF, select a template from a list of templates that you've recently used. If you haven't created a PDF, or you want to use a template that's not listed, search for the one that you want.

1. On the quote detail page, click the **Create PDF** drop-down list.
2. Select your template from the Recent Templates list, or click *`Choose Template`* and search for the one that you want. To bypass the list of recent templates and select a different one, click **Create PDF** on the quote detail page.
3. Click **Create PDF** to generate a preview.
4. Click **Save to Quote** to save the PDF to the Quote PDFs related list. The PDF name is the quote name plus a version number, such as *`AcmeQuote_V1`*.

Email a Quote PDF

1. Click the email option on the PDF preview, the quote detail page, or next to the PDF in the Quote PDFs related list.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create or email quote PDFs:
- "Edit" on quotes

An email task opens with the current quote PDF attached. To email a previous version, click **Email** next to that version in the Quote PDFs related list.

2. Enter the customer's email address, a subject, and body text, and then send.

SEE ALSO:

Considerations for Creating Quote PDFs

Considerations for Deleting Quotes

Before you delete a quote, it's a good idea to understand how deleting affects quote-related PDFs and syncing with opportunities.

- If you have the appropriate permissions, and you're an admin, the quote owner, or someone above the quote owner in the organization role hierarchy, you can delete quotes.
- When you delete a quote, here's what happens. All related PDFs, notes, and attachments are deleted. If the quote is synced with an opportunity, the record is removed from the opportunity's Quotes related list. The deleted quote is moved to the Recycle Bin.
- If you undelete a previously synced quote, it's no longer synced with the opportunity.

EDITIONS

Available in: Salesforce Classic

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

Considerations for Creating and Managing Quotes and Quote Line Items

Before you create a quote or work with quote line items, review a few key points.

Note: Your user permissions determine which tasks you can perform. See your Salesforce admin for help with any tasks that you can't perform on your own.

- Relevant price books, products, and list prices must be active in an opportunity before you can create a quote for the opportunity.
- Enterprise, Unlimited, Performance, and Developer Edition orgs can activate record types and ask you to choose a `Record Type` when creating a quote. Record types determine the picklist values and business processes that are available when you create or edit a record.
- If your Salesforce org uses divisions, the division of a new quote is automatically set to the division of the related opportunity.
- If a quote is synced with an opportunity, and you add a line item to the quote, the new line item is copied to the opportunity as a product in the Products related list.
- If an opportunity is syncing with a quote, deleting the quote line item deletes the corresponding product from the opportunity's Products related list.
- If a product has default schedules, the schedules aren't created when you add a line item to a quote. If the line item is copied from the opportunity, you can view the schedule from the opportunity. To change the schedule, edit the product record directly.
- If you have a quote line item with a discount, and the product has a default schedule on the product record or an individual schedule on the opportunity product record, you can't edit the `Discount` field of the line item.

EDITIONS

Available in: Salesforce Classic

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

Considerations for Creating Quote PDFs

Before you create quote PDFs, consider a few key points.

- Quote PDFs don't support right-to-left languages. The text aligns to the left side of the page instead of the right.
- Text fields in a related list in a quote PDF are truncated to fewer than 256 characters. This limit occurs on rich text area fields, other types of text fields, standard fields, and custom fields.
- Your Salesforce admin determines which status is the default for new quotes and which statuses allow you to email a quote PDF. For example, your admin can prevent you from emailing a quote whose status is *In Review*.

EDITIONS

Available in: Salesforce Classic

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

How Quote Syncing Works

Quote syncing lets you link a quote to the opportunity that it was created from and synchronize all updates between the two records. An opportunity can have multiple quotes, but it can sync with only one quote at a time.

While a quote and an opportunity are synced, any addition or change to the list of products in one record syncs with the list of products in the other one. Adding or removing a line item from a quote updates the synced opportunity's Products related list. Adding or removing a product from the opportunity updates the synced quote's Quote Line Items related list. Product sorting also syncs between the two records. The quote and opportunity continue to sync each way until you stop syncing or delete one of the records.

You can sync quotes and opportunities that don't have any products. When you add a product to either record, it's automatically added to the record that it's synced to.

EDITIONS

Available in: Salesforce Classic

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

If an opportunity and a quote are synced, the opportunity identifies the synced quote in the following places.

- The `Synced Quote` field on the Opportunity detail page
- The `Syncing` checkbox in the Quotes related list

If you stop the sync between a quote and an opportunity, the link is broken and the records are no longer automatically updated with each other's changes.

SEE ALSO:

Sync Quotes and Opportunities

Troubleshooting Quote Syncing

Troubleshooting Quote Syncing

Errors can occur when you try to sync quotes under certain conditions. Review common error messages, and learn how to resolve them. If you don't have the appropriate permissions, contact your Salesforce admin.

This quote can't be synced because it has inactive or archived products.

- If the product isn't active, edit the product and select the `Active` checkbox.
- If the product has been archived and the opportunity isn't closed, delete the product.

EDITIONS

Available in: Salesforce Classic

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

This quote can't be synced because it has an inactive or archived price book.

- If the price book isn't active, edit the price book and select the `Active` checkbox.
- If the price book has been archived and the opportunity isn't closed, delete the price book.

This quote can't be synced because it has inactive or archived list prices.

- If the list price isn't active, edit the list price and select the `Active` checkbox for the list price.
- If the list price has been archived and the opportunity isn't closed, delete the list price.

This quote can't be synced because it has an inactive currency.

Activate the currency from Setup by entering *`Manage Currencies`* in the `Quick Find` box, then selecting **Manage Currencies**.

This quote can't be synced because one or more of the schedules for the opportunity products have changed since the quote was created.

Create a different quote and sync it, or open the product, delete the schedule, and then re-create the schedule.

This quote can't be synced because another quote that's being synced for this opportunity is locked due to a workflow approval process. Opportunities can only sync with one quote at a time.

To unlock the other quote, finish the approval process or recall the request for approval.

The SyncedQuote field is read only within a trigger.

Determine whether your Salesforce org is using an Apex trigger that's attempting to modify the `SyncedQuote` field. The `SyncedQuote` field is read only and can't be modified with a trigger. An admin can modify the trigger.

Documenting Contracts for Your Accounts

Contracts Overview

A contract is a written agreement between two or more parties. Many companies use contracts to define the terms for doing business with other companies.

Use Salesforce to establish and document the contracts you have with your accounts. Then, track the contract through your organization's approval process and use workflow alerts to notify yourself when to initiate contract renewals.

SEE ALSO:

Contracts Home

Contracts Home

Click the Contracts tab to display the contracts home page.

- 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**.
- In the **Recent Contracts** section, select an option from the drop-down list to display a brief list of the top contracts matching that criteria. From the list, you can select any contract to go directly to the contract detail. `Contract Name` displays in this list if you have added it to your contract page layout. Toggle the **Show 25 items** and **Show 10 items** links to change the number of items that display. The fields you see are determined by the "Contracts Tab" search

USER PERMISSIONS

To view the Contracts tab:
- "Read" on contracts

To view contracts:
- "Read" on contracts

To create contracts:
- "Create" on contracts

  AND

  "Read" on accounts

layout defined by your administrator and by your field-level security settings (available in Enterprise, Unlimited, Performance, and Developer Editions only). The Recent Contracts options are:

Recent Contracts Choice	Description
Recently Created	The last ten or twenty-five contracts you created, with the most recently created contract listed first. This list only includes records owned by you.
Recently Modified	The last ten or twenty-five contracts you updated, with the most recently updated contract listed first. This list only includes records owned by you.
Recently Viewed	The last ten or twenty-five contracts you viewed, with the most recently viewed contract listed first. This list is derived from your recent items and includes records owned by you and other users.

- In the **Recent Contracts** section, click **New** to create a new contract.

SEE ALSO:

Displaying and Editing Contracts

Guidelines for Creating Contracts

Viewing Contract Lists

The contracts list page displays a list of contracts that match your current view. 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 a contract number to view the detail. Click **Edit** or **Del** to edit or delete a contract.
- If Chatter is enabled, click ⊕ or × to follow or stop following a contract in your Chatter feed.
- Click **New Contract** select **Contract** from the Create New drop-down list in the sidebar to create a contract.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view contract lists:
- "Read" on contracts

To create contracts:
- "Create" on contracts

  AND

  "Read" on accounts

Displaying and Editing Contracts

Displaying Contracts

Once you have located a contract on the contracts home or list pages, click the contract number to display detailed information. From an account, click the contract number in the Contracts related list to display the contract. All contracts associated with the account are listed in the Contracts related list. If hover details are enabled, hover over any lookup field on the detail page to view key information about a record before clicking into that record's detail page.

Viewing Contract Updates and Comments (Chatter)

Display a Chatter feed of updates, comments, and posts about the contract.

Editing Contracts

To update a contract, click **Edit**, and then change the fields that you want to update. When you have finished, click **Save**. You can also select **Save & New** to save the current contract and create another. Users with the "Edit" permission on contracts can edit contracts until they are activated. Use inline editing to edit fields directly on the detail page. If inline editing isn't enabled, contact your administrator.

Contract Related Lists

The lower portion of the display provides a snapshot of key information relating to the contract. The related lists you see are determined by your personal customization and by any customization your administrator has made to page layouts or your permissions to view related data. You can click on individual items to display additional detail. Click **more** at the bottom of the page or **View More** below a related list to display more items. Click **New** to directly add new items.

Printing Contracts

To open a printable display of the record details, in the top-right corner of the page, click **Printable View**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view contracts:
- "Read" on contracts

To change contracts:
- "Edit" on contracts

  AND

  "Read" on accounts

To change activated contracts:
- "Activate Contracts"

To return to the last list page you viewed, click **Back to list** at the top of the contracts detail page. If your organization has enabled collapsible page sections, use the arrow icons next to the section headings to expand or collapse each section on the detail page.

Guidelines for Creating Contracts

Consider entering the following optional information to maximize the quality of your data.

- The start date
- How long the contract will be in effect
- The end date

> Note: Your administrator may have configured Salesforce to calculate `Contract End Date` based on `Contract Start Date` and `Contract Term`. If `Contract End Date` is auto-calculated, it won't display on the contract's edit page.

If your organization uses divisions, the division of a new contract is automatically set to the division of the related account.

SEE ALSO:

Contracts Home

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view contracts:
- "Read" on contracts

To create contracts:
- "Create" on contracts

  AND

  "Read" on accounts

Contract History

The Contract History related list of a contract detail page tracks changes to a contract. The default is to track changes for contracts with a status of either **In Approval Process** or **Activated**. To track changes for contracts with any status, see Customizing Contract Settings.

Any time a user modifies any of the standard or custom fields whose history is set to be tracked on the contract, a new entry is added to the Contract History related list. All entries include the date, time, nature of the change, and who made the change. Modifications to the related lists on the contract are not tracked in the contract history.

You can report on activated contracts whose fields are tracked by clicking **New Report...** on the Reports tab, selecting **Contract Reports** as the Report type, and then selecting **Contract History**.

EDITIONS

Available in: Salesforce Classic

Contracts are available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Activating Contracts

Activating a contract changes the contract status to `Activated` and makes the contract read-only. Activated contracts cannot be edited, and only users with the "Delete Activated Contracts" permission can delete an activated contract.

To activate a contract:

1. Open the contract you want to activate.
2. Click **Activate**. The status of an activated contract is `Activated`.

SEE ALSO:

Displaying and Editing Contracts

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To activate contracts:

- "Activate Contracts"

  AND

  "Read" and "Edit" on contracts

Managing and Tracking Your Customers' Orders

Orders Overview

Use orders to track your customers' requests for products or services.

An *order* is an agreement between a company and a customer to provision services or deliver products with a known quantity, price, and date. Depending on your company's needs, your administrator might require orders to be added to a contract or allow them to be added directly to an account.

Example: For example, an Internet service provider may require customers to commit to a year of service. That company would require contracts as a reference for every order. On the other hand, a company that sells clothing might sell products in a single transaction. That company would associate each order directly with an account.

SEE ALSO:

Guidelines for Creating Orders

Updating Orders

Order Fields

Order History

Reduction Orders Overview

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view the Orders tab:

- "Read" on orders

To view orders:

- "Read" on orders

Finding Orders in Your Organization

Find the exact orders you're looking for by creating custom list views or using predefined list views.

To filter the orders you're viewing, from the Orders tab, select a predefined list from the View drop-down list. To create a custom list, click **Create New View**.

Once you have filtered the orders to the view you want, click an order to view more details.

SEE ALSO:

Orders Overview

Editing and Deletion Limitations for Orders and Reduction Orders

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view order lists:

- "Read" on orders

Guidelines for Creating Orders

Each order must be associated with an account or a contract, depending on your administrator's settings.

You can create an order directly on an account or contract, through its Orders related list, to automatically associate the order with that record. You can also create an order from the Orders tab and manually add the associated account and contract, if necessary.

If you want to create an order with the same details as another order, you can clone it. If you clone with products, you can't change the new order's currency or price book.

SEE ALSO:

Updating Orders

Adding Products to an Order

Orders Overview

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create an order from the Orders tab:

- "Create" on orders

To create an order on a contract:

- "Create" on orders AND "Read" on contracts

To create an order on an account:

- "Create" on orders AND "Read" on accounts

Order Fields

Understand the fields in orders and reduction orders.

Orders and reduction orders have the following fields. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

EDITIONS

Available in: Salesforce Classic

Orders are available in: **Professional**, **Enterprise**, **Unlimited**, **Performance**, and **Developer** Editions

Reduction orders are available in: **Enterprise**, **Unlimited**, **Performance**, and **Developer** Editions

Field	Description
Account Name	Name of the account associated with the order. (Read-only for reduction orders.)
Account Number	Unique number automatically assigned to the account associated with the order. (Read-only for reduction orders.)
Activated By	Name of the user who activated the order. (Read-only)
Activated Date	Date on which the order was activated.
Billing City	City portion of billing address. Up to 40 characters are allowed in this field.
Billing Country	Country portion of billing address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Billing State/Province	State or province portion of billing address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Billing Street	Street address used for billing. Up to 255 characters are allowed in this field.
Billing Zip/Postal Code	Zip or postal code portion of billing address. Up to 20 characters are allowed in this field.
Bill To Contact	Contact to whom the order is billed.
Company Authorized By	User at your organization who authorized the order.
Company Authorized Date	Date on which the order was authorized.
Contract End Date	Last day the contract is in effect. (Read-only)
Contract Name	Title for the parent contract that distinguishes it from other contracts. (Read-only)
Contract Number	Unique number automatically assigned to the contract. Numbering for contracts starts at "100". (Read-only for reduction orders)
Created By	User who created the order record. (Read-only)

Field	Description
Currency	The default currency for all currency amount fields in the order. (Read-only for reduction orders.)
Customer Authorized By	Contact on the order's account who authorized the order.
Customer Authorized Date	Date on which the contact authorized the order.
Description	Description of the order.
Last Modified By	User who most recently changed the order record
Opportunity	Opportunity that's associated with the order.
Order Amount	Total amount of the order.
Order End Date	Date on which the order ends.
Order Name	Title for the order that distinguishes it from other orders.
Order Number	Unique number automatically assigned to the order. Numbering for orders starts at "100." (Read-only)
Order Record Type	Record Type assigned to this order.
Order Reference Number	Reference number assigned to this order.
Order Start Date	Date on which the order becomes effective.
Order Type	Type of order. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Original Order	For reduction orders only. Pre-populated with the ID of the parent order when you create a reduction order by clicking **Reduce Order**.
Owner	Owner of the order. Can be either a user or a queue. Order owners have full access to their orders regardless of their account access.
PO Date	Date on which a purchase order was entered.
PO Number	Number of the purchase order.
Quote	Quote that's associated with the order.
Reduction Order	If selected, the order record represents a reduction order. Automatically selected when you create a reduction order by clicking **Reduce Order**. Read-only.
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed in this field.
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.

Field	Description
Shipping State/Province	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed in this field.
Shipping Zip/Postal Code	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed in this field.
Ship To Contact	Contact to whom the order is shipped.
Status	Indicates the stage that the order has reached in the order business process. Your organization can add values to this picklist within two system-defined order status categories: Draft and Activated. You can use these status categories to track orders within your business process using reports and views. Some user permissions apply specifically to draft statuses, and others apply specifically to activated statuses.

SEE ALSO:

Orders Overview
Reduction Orders Overview
Updating Orders
Order Product Fields

Updating Orders

Once you've created an order, make changes as needed to update the status, add or edit its products, or create a reduction order.

- Edit the order to update its details.
- Add and edit order products to identify the products or services requested.
- Activate the orders.
- Deactivate orders.
- Reduce an activated order.

EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

Orders Overview

Editing and Deletion Limitations for Orders and Reduction Orders

Some fields aren't editable once an order is created. Others aren't editable once an order has been reduced.

- You can't edit the status category of an order or reduction order from `Draft` to `Activated` or vice versa. The status field is updated based on other processes.

  For example, when you click **Activate**, the status category is changed from `Draft` to `Activated`. The status labels might differ, depending on your administrator's settings.
- Once an order is created, you can only change its `Account` field when the following conditions are true.
  - The order is in `Draft` status.
  - If the order has an associated contract, that contract is also associated with the new account.
- Once an order is created, you can only change its `Contract` field when the following conditions are true.
  - The order is in `Draft` status.
  - The account associated with the order is the same as the account associated with the new contract.
  - The currency associated with the order is the same as the currency associated with the new contract.
  - If the order has an associated price book, that price book is also associated with the new contract.
- Once a price book is assigned to an order, you can't change or remove the price book assignment.
- If an order has an associated reduction order, you can't edit the order's end date.
- To delete an activated order or reduction order, you must first deactivate it. To deactivate an order, you must first deactivate and delete any associated reduction orders.
- Only the order owners, account owners, contract owners, and system administrators can delete related orders.

Note: When you delete a contract, all related orders, notes, attachments, events and tasks, history, and approval requests are deleted. Associated accounts are not deleted with the contract. The deleted contract is moved to the Recycle Bin. If you undelete the contract, any related items are also restored.

EDITIONS

Available in: Salesforce Classic

Orders are available in: **Professional**, **Enterprise**, **Unlimited**, **Performance**, and **Developer** Editions

Reduction orders are available in: **Enterprise**, **Unlimited**, **Performance**, and **Developer** Editions

USER PERMISSIONS

To edit an order or reduction order:
- "Edit" on orders

To edit an activated order or reduction order:
- "Edit Activated Orders"

To delete an order or reduction order:
- "Delete" on orders

SEE ALSO:

Guidelines for Creating Orders

Updating Orders

Orders Overview

Activation Limitations for Orders and Reduction Orders

Activation limitations protect the integrity of your order data.

- An order must have order products before it can be activated.
- You can't activate a reduction order if it reduces an order product to a negative quantity.
- Once an order or reduction order is activated, you can't add or remove order products, but you can edit existing ones.

SEE ALSO:

Updating Orders
Orders Overview
Reduction Orders Overview
Deactivation Limitations for Orders

EDITIONS

Available in: Salesforce Classic

Orders are available in: **Professional**, **Enterprise**, **Unlimited**, **Performance**, and **Developer** Editions

Reduction orders are available in: **Enterprise**, **Unlimited**, **Performance**, and **Developer** Editions

USER PERMISSIONS

To activate orders:
- "Activate Orders"

Deactivation Limitations for Orders

Before you can deactivate orders that have any reduction orders, you must deactivate and delete its reduction orders.

SEE ALSO:

Updating Orders
Orders Overview
Reduction Orders Overview

EDITIONS

Available in: Salesforce Classic

Orders are available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Reduction orders are available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To deactivate orders and reduction orders:
- "Edit Activated Orders"

Order History

Track changes to an order—such as when the status is modified—on its detail page using the Order History related list.

Any time a user modifies a standard or custom field, a new entry is added to the Order History related list, regardless of the order's status. All entries include the date, time, and nature of the change, as well as who made the change. Modifications to the related lists on the order are not tracked in the order history.

EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

- Updating Orders
- Orders Overview
- Reduction Orders Overview

Order Products Overview

An *order product* is a product or service provided to a customer according to an associated order.

All order products in an order are associated with a price book. The Order Products related list on an order indicates in parentheses which price book the order is associated with. For example, if the Government price book is associated with your order products, the related list will be titled Order Products (Government).

A *reduction order product* is a product or service to be returned, reduced, de-provisioned, or disabled according to an associated reduction order. Each reduction order product is directly associated with an order product.

EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

- Adding Products to an Order
- Adding Products to a Reduction Order
- Editing and Deletion Limitations for Order Products
- Orders Overview
- Reduction Orders Overview

Order Product Fields

Understand the fields in order products and reduction order products.

Order products and reduction order products have the following fields. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

EDITIONS

Available in: Salesforce Classic

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

Field	Description
`Available Quantity`	Number of units available to be reduced. When a reduction order is activated, an order product's `Available Quantity` is updated to reflect the quantity of relevant reduction order products. Value must always be greater than or equal to *0*. (Read-only)
`Created By`	User who created the order product record. (Read-only)
`End Date`	End date for the order product.
`Last Modified By`	User who most recently changed the order record
`Line Description`	Description for this order product record.
`List Price`	Default price set by the price book on the parent order. (Read-only)
`Order`	Parent order for this order product.
`Order Product Number`	Automatically generated number that identifies the order product record. (Read-only)
`Original Order Product`	Number that identifies the order product being reduced. Required if the order product is reducing another order product. (Read-only)
`Product`	Name of the product used in this order product record. (Read-only)
`Product Code`	Internal code or product number used to identify the product. (Read-only)
`Quantity`	Quantity of units of the product.
`Quote Line Item`	Quote line item that's associated with the order product. The quote line item's quote must match the quote that's associated with the order product's parent order.
`Start Date`	Start date for the order product.
`Total Price`	Quantity of the order product multiplied by the unit price.
`Unit Price`	Unit price for the order product.

SEE ALSO:

Order Products Overview

Order Fields

Adding Products to an Order

Keep track of what you're selling to a customer by adding products to their order records.

You can add order products to draft orders.

1. Open the order you want to add products to.
2. In the Order Products related list, click **Add Products**.
3. If there isn't already a price book selected for this order, select the price book you want to use for this order and click **Save**.

   Note: You can only use one price book per order.

4. Select the products you want to add to your order, and then click **Select**.
5. Enter the quantity for each order product.
6. Change the unit price, if necessary.
7. Consider adding line descriptions.
8. To select more products to add, click **Save & More**.
9. To add the selected products, click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add products to an order:
- "Edit" on orders

SEE ALSO:

Editing and Deletion Limitations for Orders and Reduction Orders

Activation Limitations for Orders and Reduction Orders

Order Products Overview

Orders Overview

Editing and Deletion Limitations for Order Products

Depending on whether the parent order has been activated or reduced, there are limitations for when you can edit or delete order products.

- If an order or reduction order has been activated, you can't delete its order products. However, you can still edit an existing order product's fields.
- Once an order product has been reduced, you can no longer edit or delete the order product in that order.

SEE ALSO:

Adding Products to an Order

Adding Products to a Reduction Order

Order Products Overview

Reduction Orders Overview

EDITIONS

Available in: Salesforce Classic

Orders are available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Reduction orders are available in: **Enterprise**, **Unlimited**, **Performance**, and **Developer** Editions

USER PERMISSIONS

To edit an order product on a draft order or reduction order:

- "Edit" on order products

To delete an order product on a draft order or reduction order:

- "Delete" on order products

To edit order products on an activated order or reduction order:

- "Edit Activated Orders"

Reduction Orders Overview

Use reduction orders to track requests to reduce, return, deactivate, or disable products or services for a given customer.

A *reduction order* is an agreement between a company and a customer to process product returns, de-provision services, or reduce services that have been provisioned. For example, if a customer has purchased 30 items through an order and later requests to cancel that order, you can create a reduction order to track the request.

You can create multiple reduction orders for a single order; however, you can't create a single reduction order for multiple orders.. For example, if you need to reduce order products that were

EDITIONS

Available in: Salesforce Classic

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

purchased through three activated orders, you need to create three reduction orders—one for each original order—even if all those orders were for the same account.

SEE ALSO:

- Reducing Orders
- Activation Limitations for Orders and Reduction Orders
- Editing and Deletion Limitations for Orders and Reduction Orders
- Order Fields

Reducing Orders

If your company accepts returns or reductions on activated orders, you can reduce the relevant orders to reflect those exchanges of goods or services.

You can only reduce orders that have been activated.

You can apply a reduction order towards only one order. If you need to reduce order products across multiple orders, create a reduction order for each original order.

1. Go to the detail page of the order you're reducing.
2. Click **Reduce Order** to create a reduction order.
3. Enter the appropriate details for the reduction order, and click **Save**.
4. Add products to indicate which order products on the original order need to be reduced.

SEE ALSO:

- Adding Products to a Reduction Order
- Activation Limitations for Orders and Reduction Orders
- Updating Orders
- Order Fields
- Order Product Fields

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To reduce an order:

- "Create Reduction Orders"

Adding Products to a Reduction Order

After creating a reduction order, indicate which products need to be reduced—as well as the quantities to reduce those products.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add order products to a reduction order:
- "Edit" on orders

Note:
- An order product is reducible only if its Available Quantity is greater than zero. You can partially reduce a product, but you can't reduce it to be less than zero.
- You can reduce up to 200 order products in one reduction order.

1. Open the reduction order you want to add products to, or reduce an existing order to create a new reduction order.
2. In the Order Products related list, click **Select Products to Reduce**.
3. In the Quantity to Reduce column, enter the number of units to reduce each order product's quantity.
   - If you want to fully reduce an order product, enter the same number in Quantity to Reduce as appears in Available Quantity.
   - If you don't want to reduce an item, leave the Quantity to Reduce blank.

   For example, if the original order included 3000 coffee sleeves, and your customer only needs 2000, enter `1000` in the Quantity to Reduce column.
4. Click **Save**.

SEE ALSO:

Reduction Orders Overview

Order Products Overview

Editing and Deletion Limitations for Order Products

Sharing Orders

Your administrator defines the default sharing model for your entire organization. You can change this model to extend sharing to more users than the default set by your administrator. However, you cannot change the sharing model to make it more restrictive than the default.

EDITIONS

Available in: Salesforce Classic

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

To view and manage sharing details, click **Sharing** on the order detail page. The Sharing Detail page lists the users, groups, roles, and territories that have sharing access to the order. The Sharing button isn't available when the organization-wide default for orders is controlled by the parent. On this page, you can take any of the following actions.

- 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 access to the record for other users, groups, roles, or territories.

  Note: To share an order with another user, that user must have "Read" permission on orders.
- Click **Expand List** to view all users that have access to the record.
- 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.

Forecasting Sales

Predicting and Planning Sales Cycles with Collaborative Forecasts

Collaborative Forecasts Overview

Predict sales revenue and quantities from your opportunity pipeline, and incorporate product families, opportunity splits, and custom opportunity currency fields if needed.

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.

Predict and plan the sales cycle from pipeline to closed sales, and manage sales expectations throughout the organization with Collaborative Forecasts. A forecast is an expression of expected sales revenue based on the gross rollup of a set of opportunities. The forecast amounts shown on the Forecasts tab are totals and subtotals of the opportunities in the four forecast categories—Pipeline, Best Case, Commit, and Closed. Depending on how an adminstrator sets up your organization, those amounts may reflect opportunities from either one or multiple forecast categories. On the Forecasts tab, users can roll over the i next to the column names to see which forecast categories roll up to the totals in each column. In the rollup table on the forecasts page, forecast amounts are organized by forecast rollup, time period, and optionally by product family. Forecasts can include adjustments made by forecast managers to their immediate subordinates' forecasts as well as adjustments made by forecast users to their own forecast amounts.

Your administrator can enable up to 4 different types of forecasts for your organization simultaneously. For example, you might want to forecast on revenue from opportunities as well as quantities by product family. You can switch between forecast types by clicking the forecast name and choosing another forecast from the pop-up menu. Each type of forecast stores its own separate quota and adjustment data.

Users can view forecast amounts and their related opportunities by forecast rollup for an individual or for everyone below them in the forecast hierarchy. For example, they can see the July Best Case forecast for all the sales managers who report to them, all the sales reps who report to any one of their managers, or just one individual. Users can also adjust their own forecasts and the forecasts of subordinates one level beneath them. The user interface makes it simple to conduct status calls with an opportunity team because users can move around it with ease.

Use the flexibility of Collaborative Forecasts to perform many tasks.

- Select and view forecasts using an interactive, expandable table.
- See forecast summary information for single months or quarters, and a multi-month or quarter range, for each forecast rollup.
- If your organization uses product families, see forecast summaries for each product family.
- If your organization uses opportunity splits, see the split percentages and the split amounts that contribute to each forecast.
- View and use the list of opportunities related to each forecast amount you select. Access opportunity details directly from this list.
- Hover and click on a column boundary and adjust the width to view data more easily.
- Make adjustments, and view adjustment details, such as the original forecast amount and who made the adjustment. If you have more than one type of forecast enabled, each forecast type maintains its own separate adjustments.
- If you're a forecast manager, move up and down through the forecasts hierarchy easily.
- View revenue- or quantity-based forecasts.
- View forecasts in multiple currencies.

- View quota information on each user's forecast page. If your organization has more than one type of forecast enabled, each forecast type maintains its own separate quota information.
- Use Collaborative Forecasts reports.
- Include the opportunities of your partner portal users in your forecasts.

SEE ALSO:

Understanding the Elements of a Forecast

What's the difference between the Forecasting versions?

Considerations for Migrating from Customizable Forecasting to Collaborative 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"

Consider key points before migrating from Customizable Forecasting to Collaborative Forecasts.

Collaborative Forecasts includes much of the same functionality as Customizable Forecasting. When migrating from Customizable Forecasts to Collaborative Forecasts, keep in mind that:

- To enable Collaborative Forecasts, Customizable Forecasting must be disabled first. Contact Salesforce for assistance with disabling Customizable Forecasting.
- When you turn off Customizable Forecasting, the Quotas related list no longer appears on User records and the Edit Personal Quota permission (API name: `PermissionsEditOwnQuota`) no longer appears in the Profile object.
- If you have the original Territory Management feature enabled, disable Customizable Forecasting and original Territory Management before migrating to Collaborative Forecasts. To disable these features, contact Salesforce. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time, but the two features are not integrated to work together.
- The forecast history, overrides, reports, and sharing data from Customizable Forecasting are purged.
- Prior to migrating to Collaborative Forecasts, consider exporting forecasting report data.
- Monthly forecasts is the default Collaborative Forecasts period, however you can change your settings to quarterly. If you use custom fiscal years, your fiscal period is the default. You can also choose your custom quarters.

- The forecast hierarchy is retained. However, to reduce the chance of potential data loss, consider migrating to Collaborative Forecasts immediately after disabling Customizable Forecasts. Since the hierarchy is retained, do not enable Forecasts users again after migrating. Instead, after migration validate all hierarchies for accuracy.

Before migrating, make sure to review What's the difference between the Forecasting versions? to determine if you can benefit from the latest improvements offered in Collaborative Forecasts.

SEE ALSO:

What's the difference between the Forecasting versions?

Understanding the Elements of a Forecast

Learn about the items that contribute to and affect your forecasts.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

The Collaborative Forecasts feature is designed to help you easily find and communicate opportunity and forecast information. This table explains what a forecast is and defines the elements that comprise a forecast.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Concept	Definition
Adjustment	A layer of detail you can add to a forecast amount. An adjustment shows a forecasts manager or sales rep's judgment about the final amount they expect the forecast's opportunities to bring in at the close of the forecast period. Forecast managers may want to adjust their own or a subordinate's forecast. For example, if they know that some employees tend to be too optimistic or too conservative when assigning amounts to opportunities. Sales reps can also adjust their own forecasts if they think opportunity amounts are under or over stated. Forecast managers can adjust both forecasts that include only gross opportunity amounts or forecasts that already have adjustments made by someone else in their opportunity team. An adjustment doesn't change the underlying gross rollup amount—it just adds a layer of detail. If you have more than one type of forecast enabled, each forecast type maintains its own separate adjustments. Forecast managers can adjust their own Commit and Best Case forecasts, and those of subordinates one level beneath them in the forecast hierarchy. They can view adjustments subordinates make at every level below them in the forecast hierarchy. Adjustments made to

Concept	Definition
	their subordinates' forecasts roll up into their own forecasts. When you make an adjustment, you can choose to include a note to let others know why you made the adjustment. Adjustment notes do not appear in reports.
Amount Without Adjustments	The sum of all of a person's owned revenue opportunities and also his or her subordinates' opportunities, without adjustments. Subordinates include everyone reporting up to a person in the forecast hierarchy.
Amount Without Manager Adjustments	The forecast number as seen by the forecast owner. This is the sum of the owner's revenue opportunities and his or her subordinates' opportunities, including adjustments made by the forecast owner on her or her own or subordinates' forecasts. *It doesn't include adjustments made by forecast managers above the owner in the forecast hierarchy.*
Corporate Currency	The currency in which your organization's corporate headquarters reports revenue. Serves as the basis for all currency conversions.
Forecast	An expression of expected sales revenue based on the gross rollup of a set of opportunities. The forecast amounts shown on the Forecasts tab are totals and subtotals of the opportunities in the four forecast categories—Pipeline, Best Case, Commit, and Closed. Depending on how an adminstrator sets up your organization, those amounts may reflect opportunities from either one or multiple forecast categories. On the Forecasts tab, users can roll over the i next to the column names to see which forecast categories roll up to the totals in each column. In the rollup table on the forecasts page, forecast amounts are organized by forecast rollup, time period, and optionally by product family. Forecasts can include adjustments made by forecast managers to their immediate subordinates' forecasts as well as adjustments made by forecast users to their own forecast amounts. Here, users can view forecasts and related opportunities by forecast category for everyone below them in the forecast hierarchy or just one person. For example, you can see the July Best Case forecast for all the sales managers who report to you, all the sales reps who report to any one of your managers, or just one individual.
Forecast Amount	The revenue forecast from the forecast manager's perspective and the sum of the owner's and subordinates' opportunities, including all forecast adjustments.
Forecast Category	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.

Concept	Definition
Forecast Currency	Either the organization's corporate currency or each forecast owner's personal currency.
Forecast Display Currency	The currency that a user selects in which to display forecasts. The selection must be one of the currencies enabled for use in the organization and is made directly from the forecast page.
Forecast Hierarchy	A nested, expandable list of forecasts users. It determines how forecasts roll up within the organization, and who can view and adjust them. The forecast hierarchy is based entirely on the role hierarchy, but also specifies which users are forecast managers. When the Collaborative Forecasts feature is enabled for your organization, a forecast hierarchy is automatically generated based on your role hierarchy, but you may need to add or remove managers, sales reps, or other users.
Forecast Owner	A forecasts-enabled user who owns opportunities or is a forecast manager in the forecast hierarchy. Forecasts managers can have their own opportunities.
Forecast Quantity	The quantity forecast from the forecast manager's perspective and the sum of the owner's and subordinates' opportunities, including all forecast adjustments.
Forecast Range	The date range you want displayed in your forecast. Depending on the organization settings, the range can include months or quarters.
Forecast Type	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 has its own measurement, revenue or quantity. To use both, enable a separate forecast type for each. Administrators can enable up to four forecast types in an organization. Quantity forecasts can't be used with opportunity splits or custom opportunity field forecasts. 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

Concept	Definition
	that don't have a product family specified, the totals roll up into the Products Not Categorized row on the Forecasts page.
Gross Rollup	An expression of expected sales revenue based on the gross value of a set of opportunities. A forecast always includes a gross rollup amount and may also include one or more adjustments.
Opportunity	Opportunities are the sales and pending deals that you want to track.
Opportunity Split	Opportunity splits let users share credit across an opportunity team. If your forecast data source is opportunity splits, you can see the split information on the forecast page.
Opportunity Stage	The current stage of an opportunity, such as Prospect or Proposal. Opportunity stage values correlate with forecast category values to determine how the opportunity contributes to a forecast.
Owner Only Amount	The sum of all of a person's revenue opportunities, without adjustments.
Owner Only Quantity	The sum of all of a person's quantity opportunities, without adjustments.
Personal Currency	A user's default currency for quotas, certain forecasting versions, and reports. This must be one of the active currencies for your organization. Your quota amounts display in your display currency.
Product Family	Product Families allow you to categorize your products. For example, if your company sells both hardware and software, you can create two product families: Hardware and Software.
Quantity Without Adjustments	The sum of a person's owned quantity opportunities and also his or her subordinates' opportunities, without adjustments. Subordinates include everyone reporting up to a person in the forecast hierarchy.
Quantity Without Manager Adjustments	The forecast number as seen by the forecast owner. This is the sum of the owner's quantity opportunities and his or her subordinates' opportunities, including adjustments made on the subordinates' forecasts. *It doesn't include adjustments made by forecast managers above the owner in the forecast hierarchy.*
Quota	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.

Concept	Definition
Revenue	The total expected revenue amount from the opportunities that fit in a given category.
Rollup Table	The table at the top of a forecasts page. The Opportunities list at the bottom of the forecasts page corresponds dynamically with selections on the rollup table.
Subordinate	A Collaborative Forecasts user one or more levels beneath you in the forecast hierarchy. You can view all of your subordinates' forecasts. If your organization enables adjustments, you can view all of your subordinates' adjustment information and you can adjust the forecasts of subordinates one level beneath you in the hierarchy. Forecast amounts and adjustments roll up into the forecasts on your forecasts page.

SEE ALSO:

Collaborative Forecasts Overview

Forecasts Tab Overview

Forecasts Tab Overview

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Use the Collaborative Forecasts tab to view and update forecasts. One section of the page displays forecast information and the other shows associated opportunities.

Tip: For the best experience when using Collaborative Forecasts, keep your window sized to 1024 pixels or greater.

You can perform these tasks.

Display Selections

- View or hide quota data and quota attainment.
- If more than one currency is enabled, change the forecast display currency.
- If your organization has more than one forecast type enabled, select which of them to view by clicking the name of the currently displayed forecast at the upper-right of the Forecasts tab and choosing a different one from the menu.
- Change the individual forecast date range display by clicking **Change**.
- Refresh forecasts by clicking **Refresh**.
- View first-level subordinates' forecast information for a specific month by clicking + next to the month name.
- If your organization has a product family forecast type enabled, view the product family breakdown of a first-level subordinate's forecast by clicking + next to the subordinate's name.
- If your organization has Chatter enabled and you're a forecast manager, hover over a subordinate's name, then click Chat Now to display Chatter options such as Follow or Send a message.
- Hide details for a specific month by clicking − next to the month name.

- View a subordinate's forecast detail by hovering over the row and clicking **Details >>**.
- View the forecasts of users who report to you in the forecasts hierarchy and move through the hierarchy by clicking **Jump to...**.
- To show or hide forecast rows with all zero values, click **Display Options** > **Show Rows with All Zero Values**.

Adjustments

- Adjust a subordinate's forecast by hovering over an amount and clicking . If your organization has a product family forecast type enabled, make adjustments to individual product family amounts rather than to the subordinate's total.
- View information for adjustments you've made by hovering over an amount that contains next to it.
- View information for adjustments your subordinates have made by hovering over an amount that contains .

Opportunities

- Display the opportunities for a person, specific month, or range of months by clicking on a row label; the opportunities display on the lower section of the page.
- Display the opportunities for a specific forecast category or item by clicking on a forecast amount in the table.
- Hide the opportunities pane on the Collaborative Forecasts page by clicking **Hide**.
- Display the opportunities pane on the Collaborative Forecasts page by clicking **Show**.
- Adjust the height of the opportunities pane by hovering over the divider bar.
- Sort opportunities in the opportunities pane by clicking on a column heading.
- View an opportunity's detail by clicking on an opportunity name.
- Edit an opportunity in the opportunities pane by clicking **Edit**.
- View the account detail for an opportunity by clicking on the account name in the opportunity pane.
- View the profile of the opportunity owner by clicking on the owner's name in the opportunity pane.

Note: Because of the format and amount of information displayed in the forecast rollup table, you may find it difficult to work with forecasts in mobile browsers.

SEE ALSO:

Collaborative Forecasts Overview

Forecasts Best Practices

Understanding Monthly and Quarterly Forecasts

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Depending on your organization's Collaborative Forecasts period settings, you can forecast in either monthly or quarterly ranges. You 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

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

by default. Whether your organization uses monthly or quarterly forecasts, forecast managers can still use quotas and make adjustments to their subordinates' forecasts. Quota and adjustment periods are based on the period settings.

SEE ALSO:

Changing Your Forecast Date Range Display
Collaborative Forecasts Overview
Forecasts Tab Overview

Changing Your Forecast Date Range Display

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

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. When your administrator sets up Collaborative Forecasts for your organization, a default forecast date range display is selected. For example, your organization's default might be three months into the future. You can use this default or can change the date range displayed for your own forecast. To change your forecast date range display:

1. Click the Forecasts tab.
2. Click **Change** in the rollup table.
3. In Forecast Range, use the drop-down lists to select a beginning and ending period.
4. Click **Save**.

Example: The range you select is relative to the current month or quarter. For example, in January you might select January as your beginning month and April as the ending month. In February, the date range displayed becomes February to May, and so forth. Your date range selection remains until you choose another one.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To use Forecasts:
- "Allow Forecasting"

SEE ALSO:

Understanding Monthly and Quarterly Forecasts
Collaborative Forecasts Overview
Forecasts Tab Overview

Understanding Revenue and Quantity Forecast Measurements

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Forecasts can be calculated based on revenue or quantity. 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

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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.

For example:

- A sales manager may need to forecast using revenue because the sales vice president sets quota amounts based on the US Dollar.
- A sales representative may need to forecast using quantity because of a sales incentive to sell 10,000 units of a promotional product.

If you want to forecast Revenue & Quantity for the same data source, such as Opportunities or Product Families, Your administrator can create a forecast type for each and you can toggle between them in the Forecasts tab.

You can adjust forecast amounts in each of those forecasts. However, adjustments made in the opportunity-revenue-based forecast don't display as adjustments in any other forecast type. So, if you adjust an amount in the opportunity-revenue forecast from $100,000 to $90,000 and then switch your forecast view, you won't see an equivalent adjustment value in the opportunity-quantity forecast. If you change the forecast view back to the opportunity-revenue-forecast, you'll again see your adjustment of $90,000.

SEE ALSO:

Changing Between Revenue and Quantity Forecasts
Collaborative Forecasts Overview
Forecasts Tab Overview
Working with Multiple Currencies in Forecasts

Changing Between Revenue and Quantity Forecasts

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Forecasts can be calculated based on revenue or quantity. 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.

If your organization has both kinds of forecasts enabled, you can select the type you want to use in your forecasts. To change between revenue and quantity:

1. Click ▼ next to *Forecast Name* in *Currency Type* or Units.
2. Select `Revenue` or `Quantity (Units)`.
3. If you select Revenue and your organization has multiple currencies enabled, you can also select your display currency. Under Currency, click **Change currency**. A currency selection box opens for selecting a forecast display currency.

Note: You can adjust forecast amounts in each of those forecasts. However, adjustments made in the opportunity-revenue-based forecast don't display as adjustments in any other forecast type. So, if you adjust an amount in the opportunity-revenue forecast from $100,000 to $90,000 and then switch your forecast view, you won't see an equivalent adjustment value in the

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To use Forecasts:
- "Allow Forecasting"

opportunity-quantity forecast. If you change the forecast view back to the opportunity-revenue-forecast, you'll again see your adjustment of $90,000.

SEE ALSO:

Understanding Revenue and Quantity Forecast Measurements

Collaborative Forecasts Overview

Forecasts Tab Overview

Working with Multiple Currencies in Forecasts

Forecasts Adjustments Overview

Custom Opportunity Field Forecasts Overview

Track and predict revenue beyond the standard opportunity Amount field.

EDITIONS

Available in: Salesforce Classic

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

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

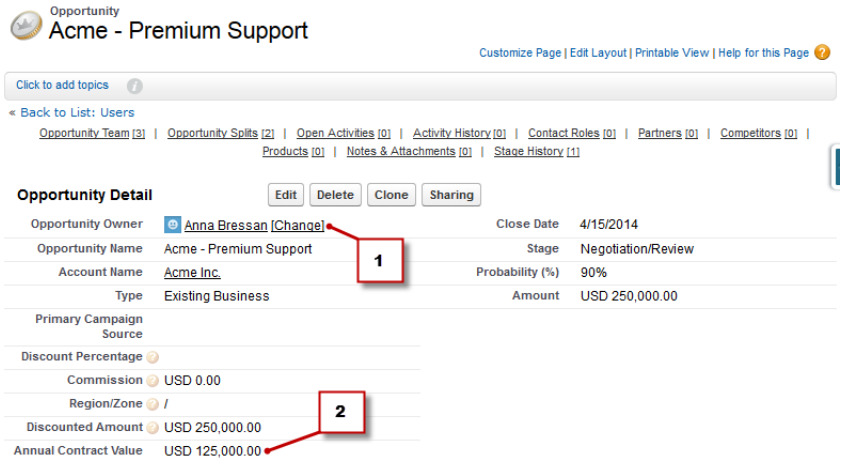
You and your sales teams can forecast on custom currency fields on opportunities. For example, your sales teams might use a custom field such as Margin, Monthly Recurring Revenue, Annual Contract Value, or any other currency field that your organization requires. Your administrator can easily set up forecasts based on any of those custom fields, which sales managers can then view in the Forecasts tab like any other forecast.

If you use opportunity splits with your custom field, your forecast incorporates those splits. You can use a custom field forecast by itself or with other forecasts, such as an opportunity-revenue forecast based on the opportunity Amount field. In addition to custom currency fields, your administrator can also set up a forecast for the standard Expected Revenue field.

Note: If the forecast manager or sales rep viewing the forecast does not have access to the custom opportunity field, they can see forecast amounts but they won't be able to see any of the custom field values in the opportunity list.

Forecasting on Annual Contract Value—a Simple Custom Field Forecast

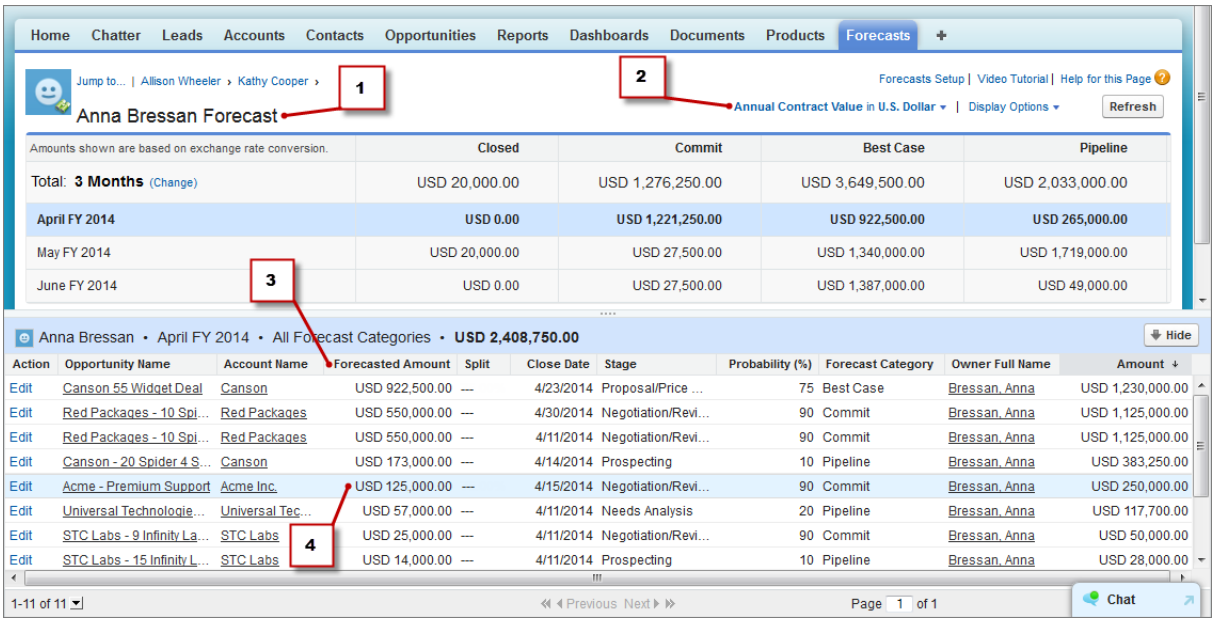
Here we see an opportunity owned by sales rep Anna Bressan. Anna's organization has a lot of multi-year deals, so they use a custom Annual Contract Value field to track the revenue received from the deal each year.



1. Anna owns this opportunity.

2. This is the custom Annual Contract Value field.

The Annual Contract Value field in all of Anna's opportunities rolls up into her Annual Contract Value forecast, which appears in the Forecasts tab along with any other forecasts that are set up in your organization.

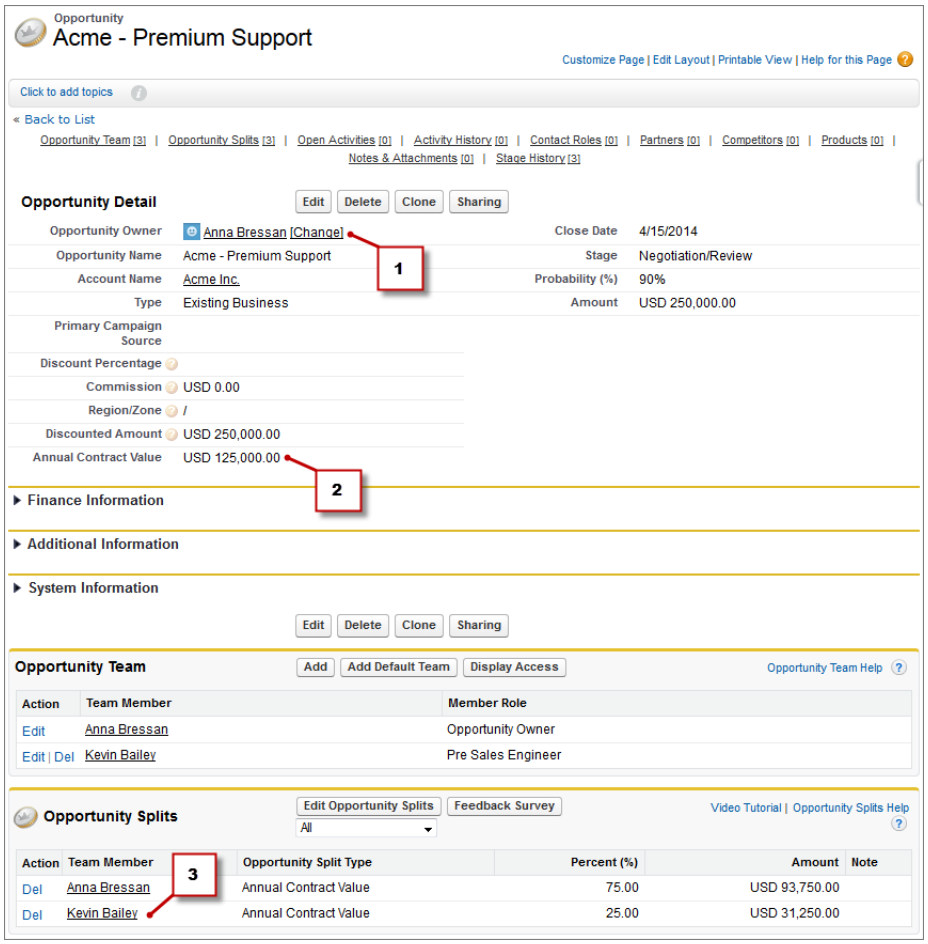


1. This is the Annual Contract Value forecast for Anna.
2. This forecast has the same name as the custom field.
3. The Forecasted Amount is the value of the Annual Contract Value field that rolls up into Anna's forecast.
4. This is the Forecasted Amount from the Annual Contract Value field on Anna's Acme – Premium Support opportunity.

Note: To enable a custom field forecast, your administrator also has to enable opportunity splits for the custom field. However, the opportunity owner automatically receives a 100% split for the field, so if your organization doesn't plan to use splits with the field, the rollup is the same as if there were no splits.

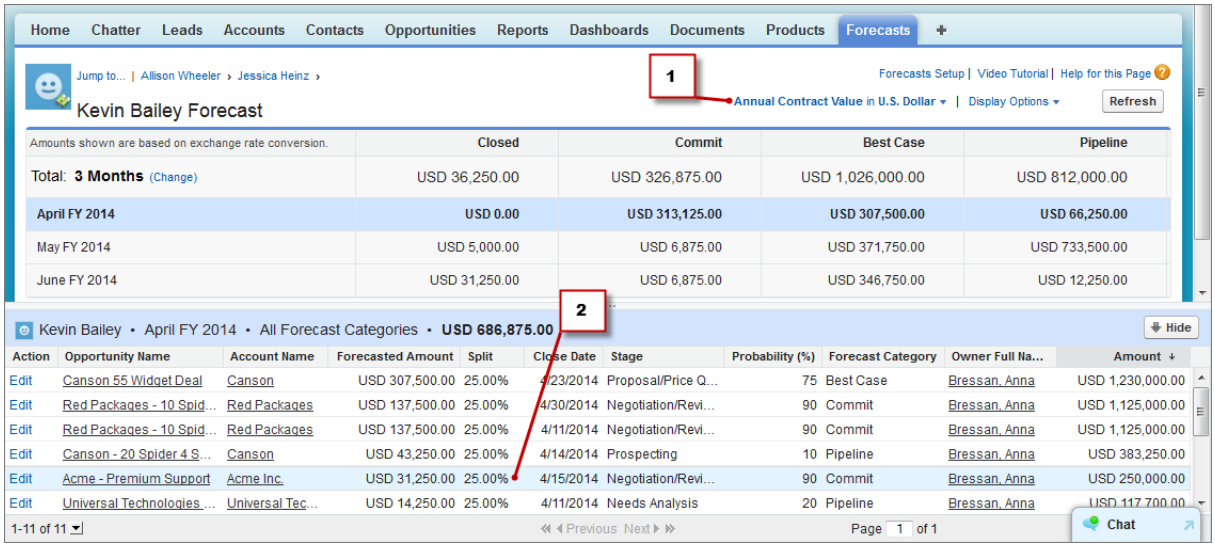
A Custom Field Forecast with Opportunity Splits

If you use opportunity splits on your custom field, your custom field forecast rolls up those splits. For example, here we can see that sales representative Anna owns an opportunity, which includes a custom split on the Annual Contract Value field for Kevin, a sales engineer responsible for increasing overall Annual Contract Value for the company. In this case, Kevin's 25% split will roll up into his Annual Contract Value forecast.



1. Anna owns this opportunity.
2. The opportunity contains a custom currency field called Annual Contract Value.
3. Kevin receives a 25% split on the Annual Contract Value field.

Kevin's manager can view the Annual Contract Value forecast where he can see the deal to which Kevin is contributing, along with all of the other opportunities his sales engineer team is working on. Kevin's manager can see that Kevin is receiving a 25% credit for all of his opportunities, which contribute to a total of $1,026,000 revenue in his Best Case forecast. If Kevin's manager thinks the deal will ultimately close for a higher amount, his manager can adjust the Best Case forecast amount upward. Anna's manager can see Anna's 75% split in her forecast.



1. This is Kevin's Annual Contract Value split forecast.
2. This is Kevin's 25% split on Anna's Acme – Premium Support opportunity.

Forecasts from the Standard Expected Revenue Field

The standard Expected Revenue field is useful for opportunities that are likely to produce more or less revenue than indicated in the Amount field. If your organization uses the Expected Revenue field, your administrator can set up a forecast for it as well. The Expected Revenue forecast then appears in the Forecast Type menu in the same way as a custom field forecast.

Overlay Splits Forecasts Overview

Track revenue from sales team members who help close opportunities, but are not directly responsible for them.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

EDITIONS

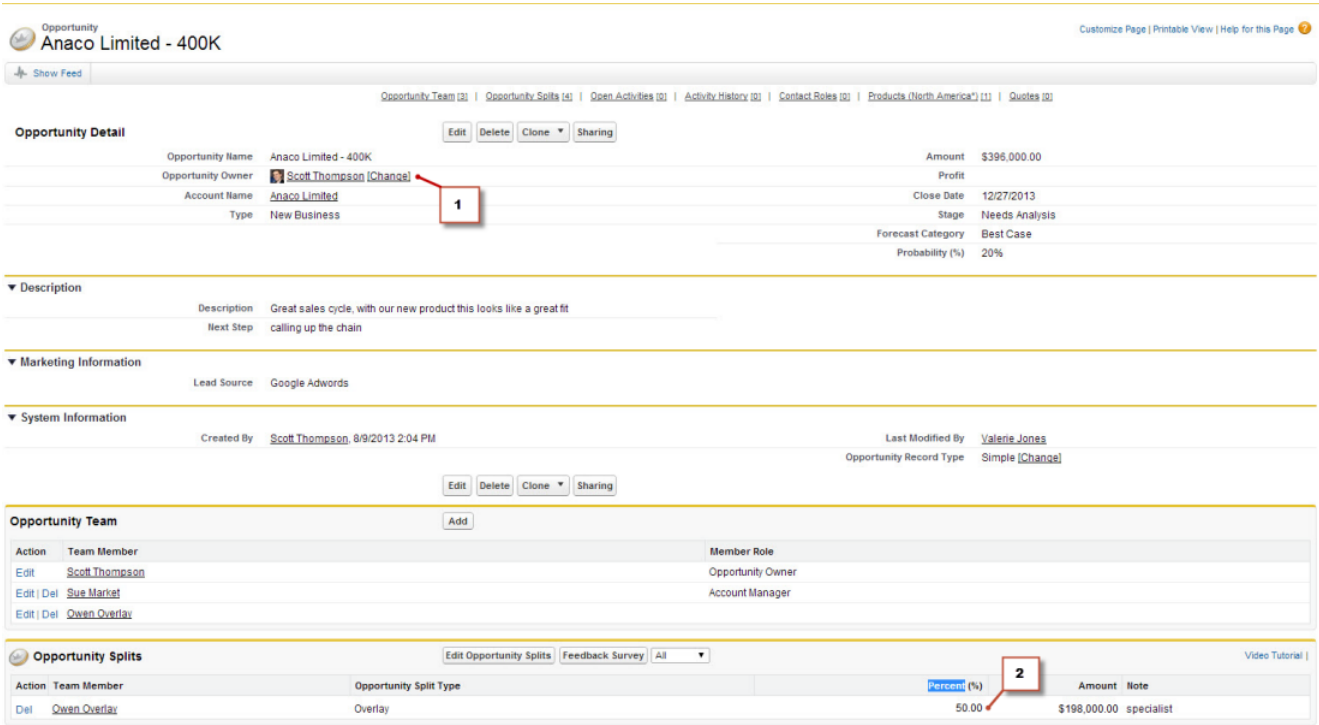
Available in: Salesforce Classic

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

As a sales manager, you may already be using revenue splits for crediting team members who are directly responsible for opportunities. To provide more flexibility with how you assign credit for opportunities, you can use overlay splits, which help you and other team members allocate credit to overlay sales roles for working on opportunities. Overlay splits can add up to any percentage of the opportunity amount, sometimes exceeding 100%. For example, your sales team may include sales engineers, product specialists, or partners who help close deals, but are not directly responsible for them.

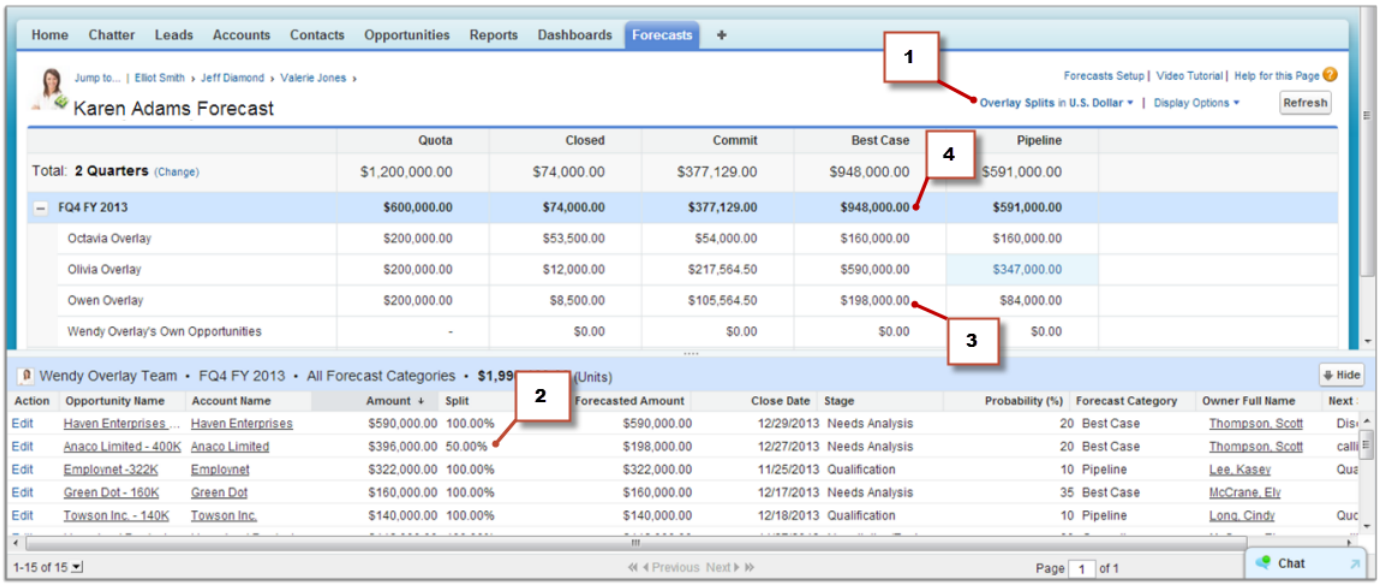
Overlay Forecasts let you predict revenue from overlay splits. Forecast amounts roll up through the role hierarchy based on the opportunity's `Amount` field and the overlay team member's split percentage.

Here we can see that sales representative Scott owns an opportunity, which includes an overlay split for sales engineer Owen, who's working with Scott to close the deal. For Scott, the opportunity Amount field will roll into his opportunity revenue forecast.



1. Scott owns this opportunity
2. Owen receives a 50% split

In addition to the opportunity revenue forecast, Owen's manager can view the overlay forecast where he can see the deal to which Owen is contributing, along with all of the other opportunities his sales engineer team is working on. Owen's manager can see that Owen is receiving a 50% credit for this deal, which contributes to a total of $948,000 revenue in his Best Case forecast. If Owen's manager thinks the deal will ultimately close for a higher amount, he can adjust the Best Case forecast amount upward.



1. The Forecast Type menu showing the Overlay Splits forecast
2. Owen's 50% split
3. Owen's $198,000 contribution to the FQ4 FY 2013 Best Case forecast
4. The total Best Case amount for FQ4 FY 2013

Forecasts Quotas Overview

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

EDITIONS

Available in: Salesforce Classic

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

Available in: **Professional** Edition with the "API Enabled" permission

A forecast 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.

Note: In Product Family forecasts, sales managers can't see their own quotas and quota attainment for individual product families. Only their total quota appears in the rollup table.

For example, three sales representatives might have combined quota amounts of $75,000 and their forecasts manager might have an individual quota of $30,000. The manager's quota in this case is $105,000. You can only edit direct subordinates' quotas, and not your own; additionally, you must have the "Manage Quotas" permission.

If forecast quotas are enabled for your organization, quota data displays in two locations on the Forecasts tab.

- A column that contains quota amounts for a specific period. If your forecast includes product families, this column includes quotas for each product family.
- A row that contains the percentage amounts attained for a specific period in a specific forecast rollup.

If you're unsure about how to enter quota data or make updates to quotas, speak to your administrator.

Tip: Hover and click on a column boundary and adjust the width to view data more easily.

SEE ALSO:

Collaborative Forecasts Overview
Forecasts Tab Overview
Showing or Hiding Quota Information

Showing or Hiding Quota Information

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

You can show or hide quota data on your forecast page. To show quota data:

1. Click **Display Options**.
2. Select **Show quotas column** to show your quota amount for each period.
3. Select **Show Quota % Attainment** to show your quota attainment for a specific rollup in a selected period. The percentage shown below each forecast amount indicates the proportion of the user's quota that the amount represents.

The quota information displayed can be either revenue or quantity amounts, depending on the type of forecast you are using. If your organization has more than one type of forecast enabled, each forecast type maintains its own separate quota information. To hide quota information, return to **Display Options** and deselect these options.

Tip: Hover and click on a column boundary and adjust the width to view data more easily.

SEE ALSO:

Forecasts Quotas Overview

EDITIONS

Available in: Salesforce Classic

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

Available in: **Professional** Edition with the "API Enabled" permission

USER PERMISSIONS

To use quotas:

- "Allow Forecasting"

  AND

  "Manage Quotas"

Forecasts Hierarchy Overview

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

The forecast hierarchy is a nested, expandable list of forecasts users. It determines how forecasts roll up within the organization, and who can view and adjust them. The forecast hierarchy is based entirely on the role hierarchy, but also specifies which users are forecast managers.

Based on your role, you can be added to or removed from the forecast hierarchy, or, your position within the hierarchy can change. For example, you might be a sales representative with no direct reports, so you can only view your own forecast. However, if your role changes and you become a sales manager, you could be added to the forecast hierarchy as a forecast manager.

Users designated as forecast managers can view the forecasts and opportunities of users, including partner portal users, below them in the forecast hierarchy. Forecast managers can also adjust the forecasts of direct reports. Only managers who made an adjustment and those above them in the hierarchy can view the adjustment.

SEE ALSO:

Forecasts Adjustments Overview

Forecasts Tab Overview

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Finding Subordinates' Forecasts with Jump to...

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

You must be a forecasts manager and have forecasts users reporting to you in the forecasts hierarchy to see **Jump to...**.

You might have several people whose forecasts you'd like to view or adjust, and you might need to traverse through several layers of the forecasts hierarchy if your organization is large. Finding forecasts is easy when you use **Jump to...**. When you view a subordinate's forecast, you see the forecast just as they themselves would see it.

1. Click **Jump to...**.
2. Begin typing up to 20 characters in the text box that appears.
3. Select a name to go to that person's forecast.
4. After you're on a forecasts page, you can expand rows by clicking them as you do in your own forecast. Hover over names to display the **Details >>** link. Navigation links with the names of forecast managers display at the top of the page as you drill down through the forecast hierarchy. Click on these links to move quickly back up the hierarchy.

SEE ALSO:

Forecasts Hierarchy Overview

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To use Forecasts:
- "Allow Forecasting"

To adjust Forecasts:
- "Override Forecasts"

Forecasts Adjustments Overview

Forecast users who anticipate differences between the current forecast and actual future results can change forecast rollup amounts. Users can add adjustments to the Best Case and Commit forecast amounts, and these adjustments can be changed or removed at any time.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

To adjust forecasts, adjustments must be enabled for your organization. Your administrator can enable managers to adjust subordinates' forecasts, all forecast users to adjust their own forecasts, or both.

An adjustment shows a forecasts manager or sales rep's judgment about the final amount they expect the forecast's opportunities to bring in at the close of the forecast period. Forecast managers may want to adjust their own or a subordinate's forecast. For example, if they know that some employees tend to be too optimistic or too conservative when assigning amounts to opportunities. Sales reps can also adjust their own forecasts if they think opportunity amounts are under or over stated. Forecast managers can adjust both forecasts that include only gross opportunity amounts or forecasts that already have adjustments made by someone else in their opportunity team. An adjustment doesn't change the underlying gross rollup amount—it just adds a layer of detail. If you have more than one type of forecast enabled, each forecast type maintains its own separate adjustments.

Forecast managers can adjust their own Commit and Best Case forecasts, and those of subordinates one level beneath them in the forecast hierarchy. They can view adjustments subordinates make at every level below them in the forecast hierarchy. Adjustments made to their subordinates' forecasts roll up into their own forecasts. When you make an adjustment, you can choose to include a note to let others know why you made the adjustment. Adjustment notes do not appear in reports.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

For example, let's say you're a sales manager who's adjusted the forecast of one of your sales representatives down from $2000 to $1500.

Your vice president, who's your forecast manager, sees $1500 when they view your forecast, along with an icon indicating the amount contains an adjustment. However, they might decide to adjust it to $2000 again.

A forecasts manager's own forecasts page shows all their forecast amounts and their related opportunity details. When managers view a subordinate's forecasts page, they see the totals that the subordinate would see. Any adjustments the manager makes to subordinates' amounts from their own forecast page don't appear on the subordinate's forecasts page. Instead, they see that subordinate user's forecasts and any adjustments the subordinate has made to their own amounts or those of their own subordinates. For example, let's say you're a vice president of sales. On your own forecasts page, you see a July Best Case forecast of $1250 (including a $50 adjustment you made) for one of your first-level subordinates, a sales manager. However, when you view the sales manager's forecasts page by using the Jump to field, the July Best Case forecast is $1200, because it doesn't include your adjustment. If both a manager and a subordinate adjust the same forecast amount, only the manager's adjustment rolls up the forecast hierarchy.

If your organization uses more than one type of forecast, adjustments you make are specific to each forecast type. For example, if you use both opportunity revenue and opportunity quantity forecasts, you can adjust forecast amounts in each of those forecasts. However, adjustments made in the opportunity-revenue-based forecast don't display as adjustments in any other forecast type. So, if you adjust an amount in the opportunity-revenue forecast from $100,000 to $90,000 and then switch your forecast view, you won't see an equivalent adjustment value in the opportunity-quantity forecast. If you change the forecast view back to the opportunity-revenue-forecast, you'll again see your adjustment of $90,000. If your organization uses product family forecasts, you can't adjust your own product family forecast amounts.

When an opportunity moves from one forecast category to another, such as from Pipeline to Best Case, the unadjusted raw amounts change for each of those rollups. However, forecast amounts with adjustments don't change in the rollup table on the Forecasts page. We recommend updating or removing your adjustments to each forecast rollup to account for changes in the stage of opportunities.

Note: While you're viewing a forecasts page, your subordinates may be adjusting forecast amounts or editing related opportunities. Or you may adjust one of your subordinates' forecasts from your own page. All these events change forecast amounts. Click **Refresh** to view the most recent forecast amounts.

This table outlines who can view and adjust your forecasts.

User	Can view your forecasts?	Can adjust your forecasts?
Your manager's manager	Yes	No
Your manager	Yes	Yes. The manager adjusts amounts from their own forecasts page.
You	Yes	Yes, if enabled by your administrator. You can only adjust forecast totals, not the subtotal for My Opportunities.
Your direct report	No	No
Your non-direct report subordinate	No	No

This table defines whose forecasts you can view and adjust.

User	Can you view forecasts?	Can you adjust forecasts?
Your manager's manager	No	No
Your manager	No	No

User	Can you view forecasts?	Can you adjust forecasts?
You	Yes	Yes, if enabled by your administrator.
Your direct report	Yes. However, if you select a direct subordinate's forecast, you see the same view as that subordinate, so your adjustments are not visible.	Yes. You adjust these amounts from your own forecasts page.
Your non-direct report subordinate	Yes. You see the same view that the subordinate sees.	No. Your direct reports can adjust their own direct reports' forecasts.

If a forecast contains adjustments, you see one or more icons next to the amount. Here's what they mean.

Icon	Definition
	You adjusted the forecast amount. You see this indicator only on your own forecasts page..
	One of your subordinates adjusted the forecast. You see this indicator on both your own and your subordinates' forecasts pages.
	Both you and one or more subordinates adjusted the forecast. You see this indicator only on your own forecasts page because when you drill down to a subordinate's page, you see the page as that user sees it.
	Save your adjustment.
	Undo your adjustment and restore the previous value of the forecast. Hover over the button to see a tool tip that tells you if the previous value includes an adjustment.
	The adjustment includes a note.
remove	Remove your adjustment and restore the previous value, which may include someone else's adjustment.

SEE ALSO:

- Adjusting Forecasts
- Viewing and Editing Forecast Adjustments
- Adjustments Purges
- Changing Between Revenue and Quantity Forecasts
- Refreshing Forecasts

Adjusting Forecasts

To add an adjustment to a Best Case or Commit forecast amount, click its cell in the forecast table and enter the new amount.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

To adjust forecasts, adjustments must be enabled for your organization. Your administrator can enable managers to adjust subordinates' forecasts, all forecast users to adjust their own forecasts, or both.

An adjustment shows a forecasts manager or sales rep's judgment about the final amount they expect the forecast's opportunities to bring in at the close of the forecast period. Forecast managers may want to adjust their own or a subordinate's forecast. For example, if they know that some employees tend to be too optimistic or too conservative when assigning amounts to opportunities. Sales reps can also adjust their own forecasts if they think opportunity amounts are under or over stated. Forecast managers can adjust both forecasts that include only gross opportunity amounts or forecasts that already have adjustments made by someone else in their opportunity team. An adjustment doesn't change the underlying gross rollup amount—it just adds a layer of detail. If you have more than one type of forecast enabled, each forecast type maintains its own separate adjustments.

When an opportunity moves from one forecast category to another, such as from Pipeline to Best Case, the unadjusted raw amounts change for each of those rollups. However, forecast amounts with adjustments don't change in the rollup table on the Forecasts page. We recommend updating or removing your adjustments to each forecast rollup to account for changes in the stage of opportunities.

If your organization uses product family forecasts, make adjustments to a subordinate's individual product family totals, rather than to their total for all product families.

Tip: To quickly find a forecast, click **Jump to...**.

To adjust a forecast:

1. When you find a forecast you want to adjust, hover over its cell and click .
2. Enter your adjustment in the field.
3. (Optional) Add a note of up to 140 characters if you want to include information about why you made the adjustment.
4. Click . A white dot ( ) appears next to the amount to show that you have adjusted the forecast, and the adjustment rolls up to the period range total rows on the page. A blue triangle ( ) appears next to the amount if you included a note with your adjustment.

Note: If you have more than one type of forecast enabled, each forecast type maintains its own separate adjustments. For example, if your organization has both opportunity-revenue and opportunity-quantity forecasts enabled, you can adjust forecast amounts in each of those forecasts. However, adjustments made in the opportunity-revenue-based forecast don't display as adjustments in any other forecast type. So, if you adjust an amount in the opportunity-revenue forecast from $100,000 to $90,000 and then switch your forecast view, you won't see an equivalent adjustment value in the opportunity-quantity forecast. If you change the forecast view back to the opportunity-revenue-forecast, you'll again see your adjustment of $90,000.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To use Forecasts:
- "Allow Forecasting"

To adjust Forecasts:
- "Override Forecasts"

SEE ALSO:

Forecasts Adjustments Overview
Viewing and Editing Forecast Adjustments
Adjustments Purges
Changing Between Revenue and Quantity Forecasts

Viewing and Editing Forecast Adjustments

You can view details about forecast adjustments that you or your subordinates have made, including who made the adjustments, the adjusted amounts, and the original gross rollup (the forecast amount before adjustments). You can also edit adjustments that you've made.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

To adjust forecasts, adjustments must be enabled for your organization. Your administrator can enable managers to adjust subordinates' forecasts, all forecast users to adjust their own forecasts, or both.

When an opportunity moves from one forecast category to another, such as from Pipeline to Best Case, the unadjusted raw amounts change for each of those rollups. However, forecast amounts with adjustments don't change in the rollup table on the Forecasts page. We recommend updating or removing your adjustments to each forecast rollup to account for changes in the stage of opportunities.

If both a manager and a subordinate adjust the same forecast amount, only the manager's adjustment rolls up the forecast hierarchy.

Tip: To quickly find a forecast, click **Jump to...**.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To use Forecasts:
- "Allow Forecasting"

To adjust Forecasts:
- "Override Forecasts"

To edit an adjustment:

1. Expand the forecast table to find the adjusted forecast that you want to view. An indicator displays next to adjusted forecast amounts.
2. Hover over the cell to view adjustment detail information.
3. Double-click the cell or click to edit or remove any adjustments that you made.

If you have more than one type of forecast enabled, each forecast type maintains its own separate adjustments. For example, if your organization has both opportunity-revenue and opportunity-quantity forecasts enabled, you can adjust forecast amounts in each of those forecasts. However, adjustments made in the opportunity-revenue-based forecast don't display as adjustments in any other forecast type. So, if you adjust an amount in the opportunity-revenue forecast from $100,000 to $90,000 and then switch your forecast view, you won't see an equivalent adjustment value in the opportunity-quantity forecast. If you change the forecast view back to the opportunity-revenue-forecast, you'll again see your adjustment of $90,000.

SEE ALSO:

Forecasts Adjustments Overview

Adjusting Forecasts

Finding Subordinates' Forecasts with Jump to...

Adjustments Purges

Each forecast type maintains its own adjustment data. Adjustments can be purged when you change some forecast and custom fiscal year settings.

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.

An adjustment shows a forecasts manager or sales rep's judgment about the final amount they expect the forecast's opportunities to bring in at the close of the forecast period. Forecast managers may want to adjust their own or a subordinate's forecast. For example, if they know that some employees tend to be too optimistic or too conservative when assigning amounts to opportunities. Sales reps can also adjust their own forecasts if they think opportunity amounts are under or over stated. Forecast managers can adjust both forecasts that include only gross opportunity amounts or forecasts that already have adjustments made by someone else in their opportunity team. An adjustment doesn't change the underlying gross rollup amount—it just adds a layer of detail. If you have more than one type of forecast enabled, each forecast type maintains its own separate adjustments. Adjustments can be purged from forecasts; when this occurs, the underlying data on which the forecasts were based remains untouched.

Adjustment purges happen when:

- Your administrator disables Collaborative Forecasts.
- Your administrator disables manager adjustments. Only adjustments made by forecast managers to their subordinates' forecasts are purged.
- Your administrator disables owner adjustments. Only adjustments made by forecast users to their own forecasts are purged.
- You are no longer a forecast manager. Only adjustments you made to subordinates' forecast amounts are purged.
- You are removed from a role that's set as a forecast manager in the forecast hierarchy. Only adjustments you made to subordinates' forecast amounts are purged.
- Your administrator changes your forecast period setting from quarterly to monthly or monthly to quarterly.
- Your administrator disables a forecast type. Only adjustments for that forecast type are purged.
- Your administrator changes the start month of your fiscal year when the forecast period is set to quarterly. Both quotas and adjustments are purged.
- Your administrator deletes a product family. Both adjustments and quotas are purged for the deleted product family.
- Your administrator moves from cumulative forecast rollups to individual forecast category rollups, or from individual to cumulative rollups.
- Your administrator creates a custom fiscal year for the first time. All adjustments and quotas for the corresponding and following standard fiscal years are purged.
- Your administrator deletes a custom fiscal period or quarter. Forecast adjustments and quotas for that period or quarter are also deleted.

SEE ALSO:

Forecasts Adjustments Overview

Adjusting Forecasts

Viewing Opportunity Details from a Forecast

View or edit details of opportunities that roll up into each of your forecast amounts.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

EDITIONS

Available in: Salesforce Classic

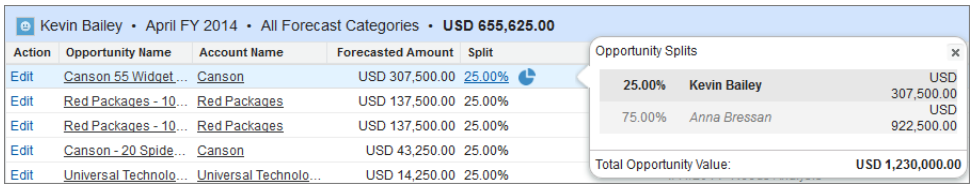
Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

From your forecasts detail page or the page of any subordinate, you can view the opportunities that make up a forecast—for a month or month range, for all your subordinates or just one. If your sales team forecasts on product families, you can also view your own or a subordinate's opportunities for each product family. When you select a cell in the rollup table, the opportunities related to that cell appear in a list at the bottom of the page. You can sort the opportunities by column header.

- **To view opportunities in all forecast categories** for a month, a quarter, or a range of months or quarters, click its table row. All opportunities in all categories appear in the opportunities list.
- **To view opportunities in any single forecast rollup** for a month, a quarter, or a range of months or quarters, click its cell within the row. The opportunities in that rollup appear in the opportunities list.

  Tip: Remember that the forecast rollups are dependent on the opportunity stage. To change your forecast category without updating the opportunity stage, go to the opportunity detail page. If your administrator added the `Forecast Category` field to your opportunity page layout, you can click it to open a selection box. In the box, use the Forecast Category drop-down list to update the forecast category for the opportunity.

- **To view the opportunities of a subordinate within a single month**, click the subordinate's row within that month.
- **To view a subordinate's opportunities for a single product family**, click + next to the subordinate's name to display the product family rows, and then click the product family name.
- **To view the splits for an opportunity**, hover over the split percent for the opportunity and then click . The Opportunity Splits detail window appears, showing splits that roll up to the selected forecast cell in bold. Other splits on the opportunity that do not roll up to the selected forecast cell appear in gray. Opportunities that contain only a single 100% split for the opportunity owner do not display split details.



- **To sort the opportunities list**, click the header of any column. Most columns are sorted alphanumerically, but the Category column is sorted by closest to or furthest from closing.
- **To move through a list that's longer than a page**, click **Previous** and **Next** or enter a page number in the Page field.
- **To edit an opportunity** that appears in the list, click **Edit** next to its name.
- **To see any Chatter posts related to the opportunity**, click the opportunity's **Opportunity Name** link to go to its detail page. Click **Show Feed**. Click **Follow** if you want Chatter notifications about all of the opportunity's activity.
- **To adjust a column**, place your cursor over the right or left margin of a column header and adjust the width.

SEE ALSO:

Editing Opportunities From a Forecasts Page

Understanding Partner Portal User Opportunities in Collaborative Forecasts

Editing Opportunities From a Forecasts Page

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

From your own forecasts page or the page of any subordinate, you can edit the opportunities that contribute to a forecast. When you finish, refresh the forecasts page to see your updates.

Tip: To quickly find a forecast, click **Jump to...**.

1. On your Forecasts page, find the opportunity you want and click **Edit**.
2. Edit the opportunity and click **Save**.
3. On the forecasts page, click **Refresh** to see the changes in the Opportunities list and the forecast table.

SEE ALSO:

Viewing Opportunity Details from a Forecast

Finding Subordinates' Forecasts with Jump to...

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To use Forecasts:
- "Allow Forecasting"

Understanding Partner Portal User Opportunities in Collaborative Forecasts

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Partner portal users are external to your organization but sell your products or services through indirect sales channels. Your partner portal users use a portal to log into Salesforce. Partners can create opportunities, and users can assign opportunities to them as well. 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

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:

Viewing Opportunity Details from a Forecast

Editing Opportunities From a Forecasts Page

Partner Portal Overview

EDITIONS

Available in: Salesforce Classic

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

Working with Multiple Currencies in Forecasts

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

This information assumes that your organization uses multiple currencies.

When an administrator sets up Forecasts for an organization, they choose a forecast currency and enable one or more types of forecasts. The forecast currency is either the organization's corporate currency or each forecast owner's personal currency.

When you use Collaborative Forecasts, you also select a *display currency*, which can be any currency enabled in the organization. At the top of the Forecasts page, click ▼ next to *Forecast Name* in *Currency Type* or Units. Under Currency, click **Change currency**. A currency selection box opens for selecting a forecast display currency.

When working with currencies in Forecasts, keep the following in mind.

- If you use revenue-based forecasts, when currency rates change, opportunities and adjustments roll up with the changed value along with values in the forecast table.
- If you use quantity-based forecasts, when currency rates change, opportunities and adjustments roll up with the changed value.
- The processing indicator ( ) displays as changed values roll up.
- All forecast periods (historical, current, and future) are impacted by rate changes.
- Deactivating a currency that is set as a user's personal currency automatically resets the user's currency to the corporate currency.

Users can edit their personal currency settings by editing their personal information.

SEE ALSO:

Forecasts Adjustments Overview

Understanding the Elements of a Forecast

Changing Between Revenue and Quantity Forecasts

Refreshing Forecasts

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

While you're viewing a forecasts page, your subordinates may be editing related opportunities or adjusting the forecasts of their own subordinates. Or you might be adjusting one of your subordinates' forecasts from your own page. All of these events can change forecast amounts.

When any opportunity update or forecast adjustment occurs for a forecast you've selected in a rollup table, we let you know.

- If the selected forecast has adjustments in process (your own or your subordinate's), you'll see a processing indicator ( ) next to the forecast.
- If any of the selected forecast's related opportunities have been updated, you'll also see the processing indicator in the header of the opportunities list.
- A message, `Processing Changes`, appears in the opportunities list header.

To see the changes, you need to click **Refresh**.

For example, while Gordon Johnson is viewing his team's opportunity revenue forecast for December, his subordinate Renee Reynolds edits an opportunity she expects to close in December. The opportunity is currently in the Commit forecast category. Renee changes the opportunity amount from $2500 to $2600. This change affects her December forecast, increasing the amount by $100.

When Gordon clicks the forecasts table cell for Renee's December commit forecast, the processing indicator appears within that cell. The indicator tells him that Renee made a change that affects the forecast. He sees the same processing indicator on the opportunities list, so he knows Renee edited an opportunity. He clicks **Refresh**. The opportunity amount changes from $2500 to $2600, and Renee's Commit forecast for December reflects the $100 increase.

SEE ALSO:

Forecasts Adjustments Overview

Adjustments Purges

Using Forecasting Reports

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

To see if your organization has forecasts reports, go to the Reports tab and click **New Report...**. Select the folder in which your administrator has placed the forecasting report types. If you don't see the fields or report type names described in the table, check with your administrator.

When using the reports, follow the best practices described here.

If you want to view	Do this
A forecast summary from a specific user's perspective.	Create a Forecasting Item report and add a filter using **Owner: Full Name**. Filter by a specific person's name.
The sum of all of a person's revenue opportunities, without adjustments.	Add **Owner Only Amount** to your Forecasting Item report. For example, if you own two opportunities, each worth $10,000, the Owner Only Amount is $20,000. To view the same information, but for quantity, add **Owner Only Quantity** to the report.
The sum of all of a person's owned revenue opportunities and also his or her subordinates' opportunities, without adjustments. Subordinates include everyone reporting up to a person in the forecast hierarchy.	Add **Amount Without Adjustments** to your Forecasting Item report. For example, if the sum of the amount of all opportunities owned by you is $20,000 and the sum of the amount of your subordinates' opportunities is $55,000, the Amount Without Adjustments is $75,000. To view the same information, but for quantity, add **Quantity Without Adjustments** to the report.
The forecast number as seen by the forecast owner. This is the sum of the owner's revenue opportunities and his or her subordinates' opportunities, including adjustments made by the forecast owner on her or her own or subordinates' forecasts. *It doesn't include adjustments made by forecast managers above the owner in the forecast hierarchy.*	Add **Amount Without Manager Adjustments** to your Forecasting Item report. For example, say Anne has an Amount Without Adjustments of $75,000, made up of $20,000 of her own opportunities and $55,000 of opportunities owned by her subordinate Ben. Additionally, she adjusted Ben's amount to $65,000 for a total of $85,000. If you adjust Anne's number from $85,000 to $100,000, then you see $85,000 in **Amount Without Manager 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 use Forecasts:
- "Allow Forecasting"

To view the Reports tab:
- "Run Reports"

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

If you want to view	Do this
	because this is what Anne sees (and Anne can't see your adjustments as you're her manager). To see the amount that includes *your* adjustment to $100,000, look at **Forecast Amount**. To view the same information, but for quantity, add **Quantity Without Manager Adjustments** to the report.
The revenue forecast from the forecast manager's perspective and the sum of the owner's and subordinates' opportunities, including all forecast adjustments.	Add **Forecast Amount** to your Forecasting Item report. For example, say you're a forecast manager and have another forecast manager reporting to you who has an Amount Without Manager Adjustment totaling $85,000. If you adjust the forecast to $100,000, the Forecast Amount is $100,000. To view the same information, but for quantity, add **Forecast Quantity** to the report.
Whose forecast amounts have adjustments made to them.	Add **Has Adjustment** to your Forecasting Item report. For example, if you make a manager adjustment to one of your subordinate's forecast amounts, this box is checked. If your subordinate makes an adjustment to one of his or her subordinate's amounts, this box is also checked. *However, unless you have the "View All Data" permission, if your forecast manager makes an adjustment to your forecast amount, this box remains unchecked; you don't have access to your forecast manager's adjustment information.* Also add **Has Owner Adjustment**. If a forecast user makes an adjustment to their own forecast, this box is checked.
Quota detail for your forecasts.	Create a Forecasting Quotas report. For example, depending on how your administrator set up the report type, you can include fields, such as the full name of the quota owner. You can then filter by your own name to see quotas you created and their related accounts and owners.
How forecast amounts today compare with earlier forecast amounts.	Create a Forecasts with Historical Trending report and compare the value of the `Forecast Amount` field at the beginning of the month with its value at the end of the month, sorted by owner.
View only results for your direct reports.	When creating a forecasting report, choose **My Direct Reports' *<item name>*** from the **Show** menu.
See which type of forecast the results are from.	Refer to the Forecasting Type field in the report results. This field is included in the default page layout for Forecasting Item and Quota reports.

Important: Reports contain the latest information at the time you run the report, so if you see a difference between your report amounts and the Collaborative Forecasts pane, it may be because changes were in process while the report was running.

Keep in mind that the data you see in reports depends on what you can view in Collaborative Forecasts. For example, forecast managers can view adjustments made, but a non-forecast manager running a similar report won't see the adjusted amounts in reports. Since a forecast amount can consist of a rollup of many users' forecast amounts, examine report results closely when using summary fields.

Forecasts Best Practices

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no Opportunity Splits or Custom Field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Consider the following best practices when using Collaborative Forecasts:

- Track important details at the opportunity level.
- Measure everything related to potential deals—activities like emails, meetings, and outreach—to determine their contributions to revenue.
- Create actionable tasks with next steps and completion dates pertaining to opportunities.
- Map your sales stages to forecast categories; adjust close probability based on historical data to increase your forecast accuracy.
- Customize your forecast category names to match your business process and terminology.
- Create dashboards for metrics of all activities related to potential sales.
- When adjusting forecasts, have conversations with your subordinates so that they understand your expectations.
- Use Chatter to share opportunity and forecast information with your team and bring attention to important details.
- Run reports to analyze trends and check performance.
- Revisit forecast adjustments weekly. Because opportunities can change frequently, this will help you avoid out-of-date adjustments.
- 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.

SEE ALSO:

Collaborative Forecasts Overview

Using Forecasting Reports

Predicting and Planning Your Sales Cycles with Forecasts FAQs

Forecasts FAQ

- What's the difference between the Forecasting versions?
- Can I adjust my own forecast?
- Why can't I adjust forecasts?
- What determines whose forecasts I can adjust?
- Why don't I see any opportunities on my forecast page?
- Why can't I use territory management?
- How do I view and update the forecasts categories and opportunity stage mappings?
- Why don't I see the "Jump to..." link on my forecast page?
- How do I set up quotas for my sales reps?

SEE ALSO:

Collaborative Forecasts Overview

What's the difference between the Forecasting versions?

Collaborative Forecasts includes much of the same functionality as Customizable Forecasting.

See which features are available in each version of Forecasting. If you're migrating to Collaborative Forecasts, see Considerations for Migrating from Customizable Forecasting to Collaborative Forecasts on page 312.

Feature	Customizable Forecasting	Collaborative Forecasts
API Access	✔	✔
Automatic Rollups	✔	✔
Chat in Real Time		✔
Custom Fiscal Years	✔	✔
Custom Opportunity Currency Field Forecasts		✔ (Not available in Professional Edition)
Default Forecast Currency Setting		✔
Individual Forecast Range Selection—Controlled by User	✔	✔
Map Forecast Categories to Opportunity Stages	✔	✔
Monthly Forecasts	✔	✔
Multiple Currency Support	✔	✔
Opportunity-level Adjustments	✔	Can use a custom opportunity currency field to save adjusted amounts and a custom field forecast to track the rollup of that field.
Opportunity List Filters and Sort		✔
Opportunity Splits Forecasts		✔ (Not available in Professional Edition)
Opportunity Stage	✔	✔
Overlay Splits Forecasts		✔ (Not available in Professional Edition)
Override (Adjust) Forecasts	✔	✔
Override (Adjustment) Notes	✔	✔

Feature	Customizable Forecasting	Collaborative Forecasts
Partner Opportunities in Forecasts	✔	✔ (Not available in Professional Edition)
Product Family Forecasts	✔	✔
Product Schedule Forecasts	✔	
Quotas	✔	✔
Quantity Forecasts	✔	✔
Quarterly Forecasts	✔	✔
Rename Categories		✔
Reports and Dashboards	✔	✔
Resize Forecast Table Columns		✔
Revenue Forecasts	✔	✔
Share Forecasts	✔	✔ (Pilot, API only)
Snapshots and Forecast History	✔	✔
Sortable Opportunities List From the Forecast Page	✔	✔
Submit Forecasts	✔	
Territory Management	✔ (The original Territory Management feature only. Enterprise Territory Management is not supported.)	

SEE ALSO:

Forecasts FAQ

Can I adjust my own forecast?

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Your administrator can enable managers to adjust subordinates' forecasts, all forecast users to adjust their own forecasts, or both. If only *manager adjustments* are enabled, non-forecasts managers can't adjust any forecasts. In this case, Collaborative Forecasts managers can adjust forecasts of subordinates who report to them in the hierarchy and not their own forecasts.

If *owner* adjustments are enabled, all forecast users can adjust their own forecast amounts.

SEE ALSO:

Why can't I adjust forecasts?

Adjusting Forecasts

Why can't I adjust forecasts?

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Your administrator can enable managers to adjust subordinates' forecasts, all forecast users to adjust their own forecasts, or both. If only manager adjustments are enabled, you must be a forecast manager to adjust forecasts. If you recently changed job functions, check the forecasts hierarchy to see if you're still a forecast manager. From Setup, enter `Forecasts Hierarchy` in the `Quick Find` box, then select **Forecasts Hierarchy**. If you're a forecast manager, your name appears next to a role that's assigned as a forecast manager.

SEE ALSO:

Can I adjust my own forecast?

Forecasts Adjustments Overview

What determines whose forecasts I can adjust?

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Your administrator can enable managers to adjust subordinates' forecasts, all forecast users to adjust their own forecasts, or both.

If you are a manager and manager adjustments are enabled, the forecasts hierarchy determines whose forecasts you can see and adjust. Even if someone reports to you in the *role hierarchy*, you can't adjust that person's forecast unless he or she reports to you in the forecasts hierarchy.

If owner adjustments are enabled, all forecast users can adjust their own forecasts.

SEE ALSO:

Can I adjust my own forecast?

Why can't I adjust forecasts?

Forecasts Adjustments Overview

Why don't I see any opportunities on my forecast page?

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Try one of the following.

- **To view opportunities in all forecast categories** for a month, a quarter, or a range of months or quarters, click its table row. All opportunities in all categories appear in the opportunities list.
- **To view opportunities in any single forecast rollup** for a month, a quarter, or a range of months or quarters, click its cell within the row. The opportunities in that rollup appear in the opportunities list.

  Tip: Remember that the forecast rollups are dependent on the opportunity stage. To change your forecast category without updating the opportunity stage, go to the opportunity detail page. If your administrator added the `Forecast Category`

field to your opportunity page layout, you can click it to open a selection box. In the box, use the Forecast Category drop-down list to update the forecast category for the opportunity.

- **To view the opportunities of a subordinate within a single month**, click the subordinate's row within that month.
- **To sort the opportunities list**, click the header of any column. Most columns are sorted alphanumerically, but the Category column is sorted by closest to or furthest from closing.
- **To move through a list that's longer than a page**, click **Previous** and **Next** or enter a page number in the Page field.
- **To edit an opportunity** that appears in the list, click **Edit** next to its name.
- **To see any Chatter posts related to the opportunity**, click the opportunity's **Opportunity Name** link to go to its detail page. Click **Show Feed**. Click **Follow** if you want Chatter notifications about all of the opportunity's activity.

SEE ALSO:

Viewing Opportunity Details from a Forecast

How do I view and update the forecasts categories and opportunity stage mappings?

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

You must be an administrator to update forecasts categories and opportunity stage mappings.

1. From the management settings for opportunities, go to Fields.
2. Click `Stage`.
3. Scroll down to Opportunity Stages Picklist Values and look at the row for each stage to see what forecast category it's mapped to; click **Edit** to edit a mapping.

SEE ALSO:

Forecasts FAQ

Why don't I see the "Jump to..." link on my forecast page?

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

You must be a forecasts manager and have forecasts users reporting to you in the forecasts hierarchy to see **Jump to...**.

SEE ALSO:

Forecasts FAQ

How do I set up quotas for my sales reps?

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

If you have the correct permissions, you can set up quotas for 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**.

4. To load quota data, use either API version 25 or later, or the Data Loader.

SEE ALSO:

Forecasts Quotas Overview

Showing or Hiding Quota Information

Why can't I use territory management?

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Territory Management is available for Customizable Forecasting and not Collaborative Forecasts.

SEE ALSO:

Forecasts FAQ

Estimating Revenue and Sales with Customizable Forecasts

Customizable Forecasting Overview

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

Customizable forecasting is a flexible solution for estimating how much revenue your organization can generate or how many items your organization can sell. You can set up customizable forecasting to reflect how your organization forecasts its sales. With it, you can forecast on a monthly or quarterly basis, use different dates when applying amounts to forecasts, forecast based on revenue or quantity or both, and define additional quotas based on product families.

Use customizable forecasts to review your forecast and drill down through your forecast amounts to see the opportunities included in your forecast. Override forecast amounts directly from the opportunity, or override the forecast from the Forecasts tab without notifying users below you in the forecast role hierarchy.

Clicking the Forecasts tab displays your forecast for the selected forecast period.

- Click **Submit** to submit a forecast, making a snapshot of the forecast data available in the forecast history and forecast reports. See Submitting Customizable Forecasts.
- Click **Forecast History** to display the forecast data you submitted in the past. Then, click **Forecast Summary** to return to the current forecast data.
- Click **Printable View** to display the selected forecast in a simple, print-ready layout.
- Review your forecast and the forecasts of any direct reports or forecasts that are manually shared with you. See Viewing Customizable Forecasts for instructions on different viewing options.
- Click the Forecast subtab to see forecast details. See Viewing Customizable Forecasts for more information.
- Click the Opportunities subtab to see the opportunities that are included in the displayed forecast. On the Opportunities subtab, you can choose, or create, a list view to further filter the displayed opportunities. See Viewing Customizable Forecasts for more information.
- Click the edit icon ( ) to make changes to the adjusted forecast total, or to add an override to a particular forecast amount. For instructions on overriding forecast amounts, see Overriding Customizable Forecasts.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To see forecasts of other users:

- "View All Forecasts"

To override your forecast:

- "Override Forecasts"

If your forecast is not available, contact your administrator about adding you to the forecast hierarchy (or the territory hierarchy, if your organization uses territory management).

Note: The Forecasts tab is unlike other tabs in that it automatically calculates data for you based on your opportunity data. You do not need to create or delete forecast records.

For information on implementing customizable forecasting for your organization, see Setting Up Customizable Forecasting.

SEE ALSO:

Do I Have Customizable Forecasting?

What's the difference between the Forecasting versions?

Do I Have Customizable Forecasting?

Managing Customizable Forecasts

Do I Have Customizable Forecasting?

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

EDITIONS

Available in: Salesforce Classic

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

Customizable forecasting may be difficult to distinguish because the tab name does not change when you convert to customizable forecasting. Here's how to tell if you have it:

Click the Forecasts tab.

- If you see either the **Introducing Customizable Forecasting** or **Request Now!** buttons, you don't have customizable forecasting.
- If you don't see either button, your organization already has customizable forecasting.

To enable customizable forecasting:

1. From Setup, enter `Forecasts (Customizable)` in the `Quick Find` box, then select **Forecasts Hierarchy**.
2. Select **Enable Customizable Forecasting**.
3. Once customizable forecasting is enabled, see Setting Up Customizable Forecasting.

SEE ALSO:

Customizable Forecasting Overview

What's the difference between the Forecasting versions?

Setting Quotas for Customizable Forecasting

Users with the appropriate permission can set their individual quota. Administrators and users with the appropriate permission can always edit any quota, and managers can always change the quotas of users that report directly to them in the role hierarchy.

1. Do one of the following:
   - To set your personal quota, access your personal information in your personal settings.
   - To change the quota of a user that reports to you, from Setup, enter *Users* in the `Quick Find` box, then select **Users**, and click the full name of the appropriate user.
2. Click **Edit** in the Quotas related list.
3. Select the appropriate range start and range length. If available, select a territory and product family.

   Note: If your organization uses custom fiscal years, you cannot set quotas for a period that does not have a defined fiscal year.
4. Enter the quota amounts for revenue and/or quantity.
5. Select the appropriate currency if you work with more than one currency.
6. Click **Save** to save the quota and return to the user detail page, or click **Quick Save** to save the values and continue to edit the quota.

   Tip: Using **Quick Save** allows you to quickly set a different quota for each product family.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set your quota:
- "Edit Personal Quota"

To set any user's quota:
- "Manage Internal Users"

  AND

  "Modify All Data"

Note: If these options are not available to you, you may not have customizable forecasting. To determine if your organization has enabled customizable forecasting, see Do I Have Customizable Forecasting? on page 345. Delegated administrators won't see the quotas related list on user records.

You can also use tools like the Data Loader to do mass updates on quotas. When updating quotas, set the quota field value on the `RevenueForecast` or `QuantityForecast` objects.

SEE ALSO:

Customizable Forecasting Overview

Managing Customizable Forecasts

Working with Forecast Categories

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

Your forecast is a representation of your opportunity amounts, dates, and stages. Click the Forecasts tab and notice that your forecast amounts are listed in different categories. Depending on its stage, an opportunity amount can be included in the following forecast categories:

- **Best Case** includes amounts you are likely to close, closed/won opportunity amounts, and amounts in the Commit category.
- **Closed** includes amounts for closed/won opportunities.
- **Commit** includes amounts you are confident about closing and closed/won opportunity amounts.

EDITIONS

Available in: Salesforce Classic

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

- **Omitted** means the amount does not contribute to your forecast.
- **Pipeline** includes amounts from all open opportunities.

Note: You can edit the forecast category field on opportunities to change the value displayed in reports, opportunity detail and edit pages, opportunity searches, and opportunity list views. For example, you can change the value of the Commit category to Won to make the category name match your business processes.

Each value in the opportunity `Stage` picklist is automatically mapped to a `Probability` and value in the `Forecast Category` picklist. Change the `Stage` of an opportunity and the `Probability` as well as the `Forecast Category` changes with it.

For example, your organization may have mapped the "Negotiation/Review" stage to the "Best Case" forecast category. This means that the amounts of your opportunities in "Negotiation/Review" are included in your "Best Case" forecast amount. Your organization may have set up different mappings but an example of how these fields map is below:

Stage	Probability	Forecast Category
Prospecting	10%	Pipeline
Qualification	10%	Pipeline
Needs Analysis	20%	Pipeline
Value Proposition	50%	Pipeline
Id Decision Makers	60%	Pipeline
Perception Analysis	70%	Pipeline
Proposal/Price Quote	75%	Pipeline
Negotiation/Review	90%	Best Case
Closed Won	100%	Commit

Regardless of whether you use customizable forecasting or not, your forecasts still rely on how your opportunity `Stage` picklist values map to values in the `Forecast Category` picklist.

SEE ALSO:

Customizable Forecasting Overview

Managing Customizable Forecasts

Managing Customizable Forecasts

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

Your forecasts represent your opportunity amounts, dates, and stages. To make sure your forecasts are an accurate representation of your revenue potential:

1. Review your forecast amounts. See Viewing Customizable Forecasts for instructions on different viewing options.
2. Determine if you want to override any amounts.
3. Override amounts if necessary. This requires the appropriate user permission. See Overriding Customizable Forecasts on page 350.
4. Submit your forecast to make a snapshot of your forecast data available in your forecast history and forecast reports. See Submitting Customizable Forecasts.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To see forecasts of other users:
- "View All Forecasts"

To override your forecast:
- "Override Forecasts"

Viewing Customizable Forecasts

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

When you click the Forecasts tab, review the amounts listed and determine if they are ready to be submitted.

- Initially, your name appears in the title bar and above `Find a Forecast:`, indicating that you are viewing your own forecast. Users with the appropriate permissions can click the magnifying glass icon and select another user or role to view that person's forecast. When you are viewing a forecast other than your own, the role or username will be displayed in the title bar and above `Find a Forecast:`. In addition, your access level will be displayed above `Find a Forecast:`.

  Note: User Sharing does not fully support Customizable Forecasting. You'll see all users in the organization regardless of the organization-wide default for the user object.

- If you organization uses manual forecast sharing, click **Sharing** to view the forecast sharing settings or to share the forecast with other users.
- If your organization uses territories, choose an option from the `Territory` picklist to summarize the forecast by that territory. See Territory Management.
- If your organization uses product families, choose an option from the `Product Family` picklist to summarize the forecast by that product family. Choosing `--All--` product families disables the **Submit**, and **Forecast History** options; choose another product family to use these options. See Define Customizable Forecast Settings for information on customizing your organization to use product families.
- If your organization forecasts on both revenue and quantity, select whether to include revenue, quantity, or revenue and quantity. This controls which information is displayed for each amount listed.
- Select a date range under `Range Start` to view another forecast period. Forecast details for opportunities that closed more than two years before you implemented Customizable Forecasting or more than 10 years in the future are not available.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To see forecasts of other users:
- "View All Forecasts"

To override your forecast:
- "Override Forecasts"

Note: Organizations that implemented Customizable Forecasting prior to the Salesforce Winter '07 release can see forecasts outside of this range.

- Select a `Range Length` to view fewer or more forecast periods.

  Note: If you are using custom fiscal years, periods before the first defined custom fiscal year or after the last defined fiscal year use calendar months or calendar quarters (depending on your forecast setting) for the range start and period length.

- Select an option next to `Display Units` to view forecast totals using a different unit of measurement. To display what portion each total is of your quota, choose **% Quota**.

Viewing Forecast History

When viewing a forecast from the Forecasts tab, click **Forecast History** to view snapshots of your forecast data taken when you submit it. You can also view the submitted forecasts of subordinates users. Click **Forecast Summary** to return to the previous view.

Viewing Forecast Amount Details

Select the Forecasts subtab to see forecast details. Click any forecast amount to view details of the opportunity amounts included in that forecast amount. From the details page, click any item listed to view it. Click **Edit** to override that item. See Overriding Customizable Forecasts for instructions on overriding forecast amounts from the opportunity.

If you have direct reports (users that report directly to you), their forecasts display below yours. The `Choose a view` option allows you to change the way forecast information is displayed for your direct reports. Use this option to group forecast data by subordinate or forecast period.

- **View by Period** displays a list of direct reports and their forecasts for each forecast period. Click any name to view the forecast for that user.
- **View by Direct Report** displays a list of forecast totals for each direct report. Click **View** next to any subordinate name to view the forecast for that user.
- Clicking any amount displays the opportunities and forecast overrides included in that amount.

Viewing Opportunities

Select the Opportunities subtab to see the opportunities that are included in the displayed forecast. On the Opportunities subtab, you can choose, or create, a list view to further filter the displayed opportunities. Click any opportunity to see the opportunity details. To override the opportunity, click **Edit**. For more information on overriding opportunities, see Overriding Customizable Forecasts.

If you have the "View All Forecasts" permission, you can see opportunities on the Opportunities subtab regardless of their sharing settings.

Note: When a partner portal is transferred to another account, the opportunities on each account are automatically recalculated through your organization's forecast hierarchy.

SEE ALSO:

Customizable Forecasting Overview

Managing Customizable Forecasts

Overriding Customizable Forecasts

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

You can make your forecast a more accurate assessment of your forecasted sales by overriding forecast amounts as needed. Any user can override a forecast from the opportunity by changing the `Stage` or `Forecast Category` of the opportunity. Users with the "Override Forecasts" permission can override their forecast or any direct report's forecast at the forecast level.

When an opportunity moves from one forecast category to another, such as from Best Case to Commit, the unadjusted raw amounts change for each of those categories, but any amounts with overrides do not change. You should update or remove your overrides to each forecast category to account for changes in the stage of opportunities.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To see forecasts of other users:
- "View All Forecasts"

To override your forecast:
- "Override Forecasts"

Overriding Your Forecast from the Opportunity

1. Click the Opportunities subtab on the Forecasts page.
2. Click **Edit** for the opportunity you want to override.
3. Make any changes to the details. The options available differ depending on whether you own the opportunity.
4. If products are on the opportunity and you want to change the forecast category for that product, select **Change Category**, then select the appropriate `Product Forecast Category`.
5. Click **Save**. The opportunity is marked with the appropriate icon indicating its override status.

   Click **Save & Refresh** to update the record and redisplay the totals.

Overriding Your Forecast Total

1. Click the Forecasts subtab on the Forecasts page.
2. Click the edit icon ( ) to override the adjusted total.
3. Enter a new amount and any comment.
4. Click **Save**. The forecast is marked with the appropriate icon indicating its override status.

Overriding the Forecast of Your Direct Reports

1. Click the Forecasts subtab on the Forecasts page.
2. Click the edit icon ( ) to override your direct report's forecast.
3. Choose one of the override options to control which override amounts, if any, are included in the forecast:
   - **Accept John Doe's forecast**—Use this option to accept the forecast of your direct report, including any overrides that he or she has made.
   - **Reject any override on John Doe's forecast, but accept forecast overrides from other subordinates**—Use this option to ignore overrides made on your direct report's forecast, but include any overrides made on forecasts further down in the hierarchy.
   - **Reject all forecast overrides**—Use this option to ignore all forecast-level overrides but include opportunity-level overrides. If you have overridden amounts at the opportunity, your own opportunity forecasts are used in this calculation. Choose this option if you want forecast amounts to be based on opportunity amounts including overrides made at the opportunity level.

- **Override the forecast and set it to—**Use this option to enter an amount that replaces the current amount in your forecast. Your manager will see this amount in your forecast but your subordinates will not.

4. If you forecast on both revenue and quantity, choose an override option for quantity forecast.
5. Click **Save**. The forecast is marked with the appropriate icon indicating its override status.

Note: The Forecasts tab is unlike other tabs in that it automatically calculates data for you based on your opportunity data. You do not need to create or delete forecast records.

SEE ALSO:

Customizable Forecasting Overview

Managing Customizable Forecasts

Overriding Customizable Forecasts from an Opportunity

A forecast override is an amount that more accurately represents your forecasted sales. You can view a list of overrides and make changes from the opportunity detail page.

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

1. From the Opportunity Forecasts related list on an opportunity record, click **Edit**.
2. Make changes to the details. See Overriding Customizable Forecasts for instructions on overriding opportunity forecast amounts.

If your organization uses territory management, the territory to which the opportunity is assigned displays in the `Territory` drop-down list.

If you are a forecast manager for multiple territories, the drop-down list shows the territories from which you can override the opportunity. Choose a value and click **Edit** to override the opportunity from the desired territory.

SEE ALSO:

Territory Management

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view forecasts of other users:

- "View All Forecasts"

To override your forecast:

- "Override Forecasts"

Manually Sharing a Forecast

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.

EDITIONS

Available in: Salesforce Classic

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

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.

Submitting Customizable Forecasts

Note: This information applies to Customizable Forecasting and not Collaborative Forecasts.

On the Forecasts tab, your forecast totals are always available to you and users above you in your role hierarchy. However, forecast totals are only available in forecast history and reports after you submit them. You can submit your own forecast or any forecast data that has been manually shared with you and you have permission to submit.

To submit your forecast:

1. Click **Submit** from your forecast on the Forecasts tab.
2. Click **OK** to confirm. Salesforce takes a snapshot of your forecast totals and makes them available in reports and your forecast history.

SEE ALSO:

Viewing Customizable Forecasts

Managing Customizable Forecasts

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To see forecasts of other users:

- "View All Forecasts"

To override your forecast:

- "Override Forecasts"

Selling Through Multiple Channels

Sharing Salesforce Information with Business Partners

Salesforce to Salesforce Overview

Salesforce to Salesforce enables business collaboration both within and across Salesforce organizations. This allows you to share certain records with your business partners that use Salesforce and get real-time updates on the shared data. For example, you can share lead and opportunity data with business partners and manage your entire pipeline and programs within Salesforce.

EDITIONS

Available in: Salesforce Classic

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

Salesforce to Salesforce allows you and your business partners to collaborate more easily and effectively. With Salesforce to Salesforce, you can share records with one or more connections, and each connection can accept records you share with them - even if other connections have accepted the same record.

Salesforce to Salesforce allows your business partners to:

- Access all their programs from one place
- Easily integrate your data with the data they manage in Salesforce
- Integrate their business processes with updates received from you

Salesforce to Salesforce allows you to:

- Have 100% visibility into your partner activity
- Manage your entire pipeline, both internal sales and channel sales, in one place
- Rapidly and easily share data across multitiered partnerships
- Integrate your business processes with updates received from your partners using workflow and assignment rules

If you want to connect to partners but aren't sure if they use Salesforce, you can use connection finder to find out.

If you receive an invitation to connect with a business partner using Salesforce to Salesforce, see Accepting or Rejecting an Invitation to Join Salesforce to Salesforce on page 355.

To invite other companies to connect with you using Salesforce to Salesforce, see Inviting Business Partners to Connect using Salesforce to Salesforce.

Note: Salesforce to Salesforce doesn't just let you share information with business partners; it's also part of a high-availability solution called Organization Sync. For information about Organization Sync, see Organization Sync.

SEE ALSO:

Tips for Using Salesforce to Salesforce

Finding Out if Your Partners Use Salesforce

Inviting Business Partners to Connect using Salesforce to Salesforce

Before you can start sharing data with your business partners, you need to set up a connection to them using Salesforce to Salesforce. To create that connection, you need to invite your business partner.

Note: Before beginning the invitation process, you need to create an account and an associated contact for your business partner.

To invite a business partner to connect using Salesforce to Salesforce:

1. Click the Connections tab.
2. Click **New**.
3. Enter a contact name or use the lookup icon to select a contact.

   Important: Make sure that the email address is valid; otherwise, your invitation may be sent to the wrong person.

4. Optionally, select a related account.

   Note: The account associated with the connection can be changed after the invitation is sent.

5. Choose a user to manage the connection.
6. Optionally, choose a template to apply to the connection.
7. Click **Save & Send Invite**.

To invite multiple business partners to connect using Salesforce to Salesforce:

1. Click the Contacts tab.
2. Select a standard or custom list view, then click **Go!**.
3. In the list view, select the checkboxes next to the contacts you want to invite.

   Important: Make sure that the email addresses are valid; otherwise, your invitations may be sent to the wrong people.

4. Click **Invite to Connect**.
5. Choose a user to manage the connection.
6. Optionally, choose a template to apply to the connection.
7. Click **Save & Send Invite**.

The people you invite will receive an email invitation to connect with you using Salesforce to Salesforce. They can choose to accept or decline your invitation. You can check whether they have accepted or declined the invitation by reviewing your connections on the Connections tab. From the Connections tab, you can also resend or cancel the invitation. To learn more about connections, see Connections Home Page on page 356.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To invite to a business partner to connect using Salesforce to Salesforce:

- "Manage Connections"

Note: For information about sending an Organization Sync replication connection invitation in Salesforce to Salesforce, see Connect the Organizations.

SEE ALSO:

Finding Out if Your Partners Use Salesforce

Connection Templates in Salesforce to Salesforce

Creating and Applying Connection Templates

Accepting or Rejecting an Invitation to Join Salesforce to Salesforce

If a business partner sent you an invitation to connect using Salesforce to Salesforce, you can accept or reject that invitation by following these steps:

1. Click the link in the invitation email to go to the Salesforce login page.
2. Log in as the System Administrator or as a user with the "Manage Connections" permission.
3. Review the details of the invitation.
4. Click **Accept** or **Decline**.

   If you aren't sure whether you want to accept or decline, click **Decide Later**. The invitation displays on the Connections tab with a connection status of Invitation Received. You can easily accept or decline it at a later date.

When you accept or reject an invitation, the company that invited you receives an email notifying them of your decision. The content of that email can be configured by changing the appropriate email template.

SEE ALSO:

Salesforce to Salesforce Overview

Tips for Using Salesforce to Salesforce

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To accept or reject an invitation to connect using Salesforce to Salesforce:

- "Manage Connections"

Connections Home Page

The Connections tab allows you to manage your Salesforce to Salesforce connections and connection templates. From the Connections tab, you can:

- Select the Connections subtab to manage connections. Connections include everyone that you have invited, whether they have accepted, declined, or have not yet responded, as well as all the invitations you have received. Recent connections are automatically displayed on the Connections subtab.
  - To view details about a connection, click the connection name.
  - To invite new connections, click **New**, then enter the connection details and click **Save & Send Invite**.
  - To deactivate a connection, click **Deactivate**.
  - For invitations to connect that have been sent but not accepted, you can click **Resend** to resend the invitation, or **Cancel Invitation** to cancel the invitation. For more information about inviting connections, see Inviting Business Partners to Connect using Salesforce to Salesforce on page 354.
- Select the Templates subtab to manage connection templates. Templates allow you to define and publish sets of objects and fields to one or more standard Salesforce to Salesforce connections. Recent templates are automatically displayed on the Templates subtab.
  - 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**.
  - To view details about a template, click the template name.
  - To create a new template, click **New**.
  - To edit a template, click **Edit** next to the template you want to edit. For more information about using templates, see Creating and Applying Connection Templates on page 358.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view and manage connections for Salesforce to Salesforce:
- "Manage Connections"

To view and manage templates for Salesforce to Salesforce:
- "Manage Connections"

Note: To learn about Organization Sync, a high-availability feature built on the framework of Salesforce to Salesforce, see Organization Sync.

SEE ALSO:

Managing Connections

Managing Connections

From the Connections tab, you can view connection details and manage connections. The connection details include information on the status of the connection, the owner of the connection, information about the company, published and subscribed fields, and a connection history.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To manage connections:
- "Manage Connections"

To view a connection:

1. Click the Connections tab.
2. On the Connections subtab, click the name of the connection that you want to view.

From the connection detail page, you can:

Accept an Invitation

If a business partner has sent you an invitation to connect using Salesforce to Salesforce, click **Accept** to accept the invitation. After you accept the invitation, you can subscribe to objects that the connection has published and begin sharing objects with the connection using the Published Objects and Subscribed Objects related lists on a connection detail page.

Cancel an Invitation

If an invitation you sent hasn't been accepted, you can cancel the invitation by clicking **Cancel Invitation**. If your partner hasn't received the invitation, click **Resend** to send it again.

Deactivate Connections

If you have created a connection with a business partner and you no longer wish to use the connection, click **Deactivate**. If a connection is deactivated, you can still view and update records that your connection shared with you, but updates you make won't be sent to your connection. If you sent records to your connection that they didn't accept, the records are removed from their organization, and vice versa.

Edit Connections

When displaying the connection, you can modify the connection by editing the connection details. To change the objects published to a connection, click **Publish/Unpublish**, or to use a connection template, click **Edit** and select an active template. To edit the published fields on an object, click **Edit** next to the object. To change the objects you're subscribed to, click **Subscribe/Unsubscribe**. For more information, see the following:

- Publishing Objects in Salesforce to Salesforce on page 367
- Subscribing to Objects in Salesforce to Salesforce on page 360
- Publishing Fields in Salesforce to Salesforce on page 368
- Subscribe to Fields in Salesforce to Salesforce on page 361

View Connection History

You can view a detailed history of the connection in the Connection History related list of the connection detail page. To export the connection history, select **Download connection history (csv)**. This lets you download a comma-separated values file that includes the following information:

- Connection status changes
- Changes to which account is associated with the connection
- Changes to which contact is associated with the connection
- Connection owner changes
- Changes to published fields
- Email communications sent to your business partners
- Errors related to validation rules and Apex triggers with validation rules resulting from:
  - Records manually accepted

- Records automatically accepted
- Records updated by Connection User

Note: System errors, for example, code errors, aren't logged in the Connection History.

SEE ALSO:

Connections Home Page

Connection Templates in Salesforce to Salesforce

Connection Templates in Salesforce to Salesforce

Connection templates allow you to define objects and fields that can be published to connections. Connection templates can be assigned to one or more standard Salesforce to Salesforce connections, making the process of publishing fast and easy. From the Connections tab, click the Templates subtab to view, create, and edit connection templates.

When a connection template is applied to a connection, the object and field rules are applied to that connection.

The following rules apply to connection templates:

- Objects and fields that are not already published but are published in the connection template are published.
- Objects and fields that have the same publish or unpublish status as the template are unchanged.
- Objects and fields that are already published but are not published in the connection template are unpublished.

SEE ALSO:

Creating and Applying Connection Templates

Connections Home Page

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, edit, and view connection templates:

- "Manage Connections"

Creating and Applying Connection Templates

Creating and Editing Connection Templates

Connection templates allow you to define object and field publishing rules that can be applied to one or more standard Salesforce to Salesforce connections.

To create a connection template:

1. Select the Connections tab.
2. Select the Templates subtab.
3. Click **New**.
4. Type a name and an optional description.
5. Select the **Active** checkbox if you want to be able to assign the template to standard connections.
6. Click **Save** to save the template, or click **Save & Add Objects** to add objects to the template.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create, edit, and view connection templates:

- "Manage Connections"

7. If you clicked **Save & Add Objects**, select the checkboxes next to the objects you want to add, then click **Save**.

   Note: If you clicked **Save**, you can click **Add/Remove Objects** on the template detail page to add objects.

8. Click **Edit** next to an object you added to the Published Objects related list.
9. Select the fields you want to publish for the object, then click **Save**.
10. Repeat steps 8 and 9 for each object you added to the Published Objects related list.

To deactivate a connection template:

1. On the Templates subtab, click **Edit** next to the template you want to deactivate. Alternatively, click **Edit** on the template detail page.
2. Deselect the **Active** checkbox.
3. Click **Save**.

Note: Only active connection templates can be assigned to connections. If you want to use a template that you had deactivated, you can do so by selecting the **Active** checkbox.

Assigning Connection Templates to Connections

You can assign connection templates to connections when inviting one or more new connections, or you can assign connection templates to existing connections.

To assign a connection template to an existing connection:

1. Select the Connections tab.
2. Select the Connections subtab.
3. Click the name of the connection you want to assign the template to.
4. Click **Edit**.
5. In the `Template` field, type the name of the template or click the lookup icon to search for a template.
6. Click **Save**.

SEE ALSO:

Connection Templates in Salesforce to Salesforce

Connections Home Page

Sharing Records Using Salesforce to Salesforce

Once you have created a connection to another organization, you can share data with them. Your business partners do not have direct access to your record; they have a record in their organization that is connected, using Salesforce to Salesforce, to your record. Any updates to the shared information on either record is reflected on the other record. You can share records with one or more connections. Each connection has the opportunity to accept shared records, even if other connections have also accepted the same record.

Note: Making records available to business partners using Salesforce to Salesforce is not the same as sharing records within your organization.

You can control the type of records you share with your business partners by selecting which objects and fields to publish.

EDITIONS

Available in: Salesforce Classic

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

In addition, you can control how the information your business partner makes available to you is used in your organization by subscribing to objects and mapping the fields on those objects to fields on your own objects.

Individual records and their related records are made available to your connections by forwarding the record to one or more connections, or by assigning the record to a queue that contains connections. When you forward a record to a connection, you can select which related records to include, and you can send your connection contact an email notification that a record has been made available.

Similarly, your business partners can make records available to you. When a record has been made available to you by a business partner, you can view basic details about the record from a view on the object's home page. Then you choose whether to accept the record, and its related records, or not. Additionally, when subscribing to an object, you can specify that the object's records are automatically accepted when shared by your connection. This is particularly helpful if you're expecting the connection to share a large volume of records.

Once you have accepted a record, you can make it available to other connections in the same way you can make any record available using Salesforce to Salesforce. This allows you to work in a multi-tiered business network. In a multi-tiered network, changes made to the shared record in any organization updates the information in all the organizations that are sharing the record.

SEE ALSO:

Publishing Fields in Salesforce to Salesforce

Subscribe to Fields in Salesforce to Salesforce

Tips for Using Salesforce to Salesforce

Subscribing to Objects in Salesforce to Salesforce

When you are connected to a business partner using Salesforce to Salesforce, you can subscribe to objects that your business partner has published. When you subscribe to an object, you map it to an object in your organization. Standard objects must map to standard objects in your organization, but you can map custom objects to any custom object. For example, if your business partner has published a custom object named Prospects, you can map that to a custom object named Client.

To subscribe to objects for a connection:

1. Click the Connections tab.
2. Click the name of the connection you want to modify.
3. In the Subscribed Objects related list, click **Subscribe/Unsubscribe**.
4. Choose the objects you want to subscribe to by selecting the object in your organization you want mapped to that object. Select `--None--` if you do not want to subscribe to a published object.
5. Select the `Auto-Accept` checkbox next to an object if you want to automatically accept records of that type when shared by your connection. The checkbox appears once you select a mapping.

Note: This checkbox is not available for:

- Child objects. Opportunity products, tasks, and public case comments are automatically accepted when the parent record is accepted. Attachments are automatically accepted if marked public and the `Share With Connections` checkbox is selected.
- Objects that have one or more master objects, such as custom junction objects or detail objects in a master-detail relationship.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To subscribe to published objects :

- "Manage Connections"

Additionally, `Auto-Accept` does not apply to any record that is shared as the child of another record, for example a case record that is the child of a case record that you already accepted.

6. Click **Save**.

Note: If your business partner stops publishing an object to which you are subscribed, you are automatically unsubscribed from that object.

Once you have subscribed to an object, you can map published fields on that object to fields on your object. For example, you can map the `Description` field on leads to a custom field on leads called `Partner Description`. This would allow you to use your own field to describe the lead for users within your organization rather than using the description provided by your business partner.

Additional Considerations

- If you choose to auto-accept leads or cases, any active assignment rules in your organization run when a record is automatically accepted.
- In order to automatically accept a record shared by your connection, the connection owner for that record must be an active user.

Subscribe to Fields in Salesforce to Salesforce

When you accept an invitation from a business partner to join Salesforce to Salesforce, you can subscribe to fields that your business partner has published and map those fields to your fields. When your business partner updates the fields on a record that you're sharing, the fields will be updated on the shared record in your organization.

For example, if your business partner has published the `Description` field, you could map that field to a custom field called `Partner Description`. This would allow you to use your own field to describe the lead for users within your organization.

Before subscribing to fields, see Best Practices for Mapping Fields in Salesforce to Salesforce.

To map fields on a subscribed object:

1. Click the Connections tab.
2. Click the name of the connection you want to modify.
3. In the Subscribed Objects related list, click **Edit** next to an object.
4. Map your business partner's published fields to your organization's fields by choosing the appropriate field in the drop-down list.

   Note: Fields can only be mapped to fields with the same data type, length (for text and numeric fields) and decimal places (for numeric fields), so the drop-down list only shows fields with the correct data type. You can see the data type details of a published field by hovering your mouse over the information icon ( ) next to the field. Select `--None--` if you don't want to populate any of your fields with the data from a published field.

5. If the field is a picklist, click **Edit Values** to map each published picklist value to a picklist value in your organization.
6. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To subscribe to published fields :

- "Manage Connections"

Note: Changes to field mappings and picklist values may not show up in your business partner's organization for up to 15 minutes while Salesforce refreshes the cache. This cache enables us to support larger transaction volumes and reduce the number of API calls that count against your organization's limits.

SEE ALSO:

Managing Connections

Publishing Fields in Salesforce to Salesforce

Best Practices for Mapping Fields in Salesforce to Salesforce

When you subscribe to a field in Salesforce to Salesforce, you need to map it to a field in your organization. This lets updates to that field sync for all shared records. Before you map fields, take a look at these important best practices.

EDITIONS

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

Important: This information applies to standard Salesforce to Salesforce connections. If you're mapping fields for a replication connection as part of Organization Sync, some of this information may not apply.

Auto-Mapping Fields

- When subscribing to fields, select **Auto-Map Fields** to automatically map your business partner's fields to your fields. After you select this option, click **Save** for your changes to take effect.
- For any unmapped field, Salesforce checks if the field's API name matches that of any of your fields. If there are no matches, Salesforce checks for matching field labels. If Salesforce still can't find a match, `--None--` is selected.
- Selecting **Auto-Map Fields** doesn't overwrite previous selections, and deselecting it doesn't affect fields that were mapped previously.
- The following standard fields are automatically mapped:
  - Account: `Account Name`, and, if you are using person accounts, `Last Name`
  - Attachment: `Body`, `Content Type`, `File Name`
  - Case: `Subject`
  - Case Comment: `Body` and `Published`
  - Contact: `Last Name`
  - Custom Object: `Name`
  - Lead: `Last Name` and `Company`
  - Opportunity: `Name`, `Closed Date`, and `Stage`
  - Product: `Product Name`
  - Task: `Subject`
  - Opportunity Product: `Quantity`, `Sales Price`

Mapping Picklist Fields

- If a picklist value is mapped to `--None--`, and your business partner enters a picklist value, your picklist field will be set to the same value. For example, if you subscribe to the Lead Status picklist, and your business partner has the value `Internal` in that picklist, your record will have a lead status of `Internal`.
- To convert a custom field to a picklist field, stop publishing the field, change the field type, then publish the field again.

Mapping Currency Fields

- If you map a currency field, and a record shared by your connection uses a currency that your organization hasn't enabled, that currency field won't be updated when your organization auto-accepts the record. If you're manually accepting the record, the currency is updated only if your organization uses the same currency as the record.

  For example, suppose your connection has shared an opportunity with you. Your organization uses the Euro only. Your connection updates the opportunity amount to $300. The opportunity amount won't update in your record because your organization doesn't support the U.S. Dollar.

- If you map a currency field and either you or your connection changes the currency on a record containing that field, updates you make to the field will no longer be propagated to the other organization, and updates your connection makes to the field won't be reflected in your organization.
- You can map roll-up summary fields to currency fields with the same currency type. For example, a roll-up summary with the currency type `U.S. Dollar` can be mapped to a currency field that uses the U.S. Dollar.

Mapping Quantity and Revenue Schedules

- If Quantity Schedules or Revenue Schedules are enabled in your connection's organization and you subscribe to the Products object from that connection, you must subscribe to the following fields and map them to matching fields in your organization.

Type of Schedule	Fields to Map
Quantity Schedule	- `Number of Quantity Installments` - `Quantity Installment Period` - `Quantity Schedule Type`
Revenue Schedule	- `Number of Revenue Installments` - `Revenue Installment Period` - `Revenue Schedule Type`

Mapping Different Field Types

- Person account fields should be mapped only to person account fields, and business account fields should be mapped only to business account fields.
- If your connection is using person accounts and you aren't, the person account field `Last Name` is used as the Account Name when your connection shares a person account record with you. If you enable person accounts, you are automatically subscribed to `Last Name`. Any changes to Last Name and Account Name are synced.
- You can't map a standard number field to a custom number field.
- You can map lookup fields to text fields that have a length of 80 or more characters. If your connection edits a lookup field that you mapped to a text field, the text field will be updated with their changes.
- You can map auto-number fields to text fields that have a length of 30 or more characters.
- You can map formula fields to fields of the same data type; for example, a formula field that has a number data type can be mapped to a field with a number data type. If a formula field is a text data type, it can be mapped to a text field with a length of 80 or more characters. Conversely, fields can't be mapped to formula fields; for example, a formula field with a currency data type can be mapped to a currency field, but a currency field cannot be mapped to a formula field. System audit fields are not supported.

Unsubscribing to Fields

- You are automatically unsubscribed from a field if:
  - Your business partner stops publishing the field
  - You delete a custom field that is mapped to a published field
  - The field type of a custom picklist or custom multi-select picklist is changed (for example, if a custom picklist is changed to a text field)

SEE ALSO:

Subscribe to Fields in Salesforce to Salesforce

Accepting Records Shared from a Connection

Salesforce to Salesforce allows you to accept records that have been made available to you by business partners with whom you have connections. When accepting a record, you can assign it to yourself, another user, a queue, or, if it is a lead or case, use your organization's assignment rules to automatically assign it. If the record is a child of another record you have accepted, you can assign it to the parent record when accepting it. Additionally, when subscribing to an object, you can specify that the object's records are automatically accepted when shared by your connection.

If validation rules prevent you from accepting shared records, create a validation rule with the `Received Connection Name` field not equal to null; this will ignore validation rules for records you accept from your connections. To create this rule, use the following formula:

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To accept shared records:
- "Read" and "Edit" on the object

To view records shared by a connection:
- "Manage Connections" or have access to the list view

```
IF(OR(ISNEW(), ISNULL(Id)), if(ConnectionReceivedId =null,
TRUE, FALSE),NOT(AND(ISCHANGED(ConnectionReceivedId),
NOT(ConnectionReceivedId = null))))
```

You should also create a similar rule for any Apex trigger that has validation checks.

To accept records that have been made available to you:

Note: When you manually accept a record, it takes some time for all mapped fields on the record to be updated.

If an error occurs when accepting a record, see the Connection History for details.

1. Select the tab of the record type you are accepting.

2. Select a connections list view and click **Go!**. For example, on the Leads tab, in the **Leads from Connections** section, select a list view from the drop-down list and click **Go!**.
3. For accounts, contacts, and opportunities, click **Accept** next to the record you want to accept. For cases, leads and custom objects, select the checkbox next to the records to accept, then click **Accept**.

   Note: If a record is a child of a record you have accepted, the name of the parent record is displayed in the Parent Record Name column. If the record is a parent record or has no parent record, this column is blank.

   When you accept a record that has public attachments, the attachments are automatically accepted if you selected the `Share With Connections` checkbox on the attachment.

Accepting Opportunity Records

When you accept an opportunity, you have the option to relate the opportunity to an object and a price book, and to relate the opportunity to a new account or opportunity, or to use an existing account or opportunity. If you create a new opportunity or account, you can also set the owner of that record.

Accepting Account Records

When you accept an account, you have the option relate the account to another object and to create a new account, or to use an existing account. If you create a new account, you can also set the owner of that record.

Accepting Contact Records

When you accept a contact, you have the option relate the contact to another object and to create a new account or contact, or to use an existing account or contact. If you create a new contact or account, you can also set the owner of that record.

Accepting Case, Lead, and Custom Object Records

When you accept a case, lead or custom object, you have option to relate the case, lead or custom object to another object and to assign the lead or custom object to a new owner.

Note: If you choose to `Assign using active assignment rule` and no assignment rule criteria is met, the lead, case, or custom object is assigned to the Default Lead, Case, or Custom Object Record Owner.

Accepting Product Records

When you accept a product, you have the option to create a new product or relate the product to an existing product.

Additional Considerations

- After accepting a shared record, if you update a field that your business partner has subscribed to, the field is automatically updated on the record in your business partner's organization. Likewise, if your business partner updates a field to which you have subscribed, it is automatically updated in your organization. When your business partner updates the record, the `Last Updated By` field will be set to “Connection User”.
- Once you have accepted a record, you can make it available to other connections in the same way you can make any record available using Salesforce to Salesforce. This allows you to work in a multi-tiered business network. In a multi-tiered network, changes made to the shared record in any organization updates the information in all the organizations that are sharing the record.

- When your business partner shares child records at a later time using the **Manage Connections** link in the related list of a record you have already accepted, the child records can be automatically added to your organization.

SEE ALSO:

Sharing Records Using Salesforce to Salesforce

Connections Home Page

Tips for Using Salesforce to Salesforce

Automatically Accepting Related Records From a Connection

Rules for Automatically Accepting Related Records From a Connection

When you share records using Salesforce to Salesforce, you can also share child records. When you accept a record from a connection, or when your connection accepts a record from you, the child records can be automatically accepted provided that certain criteria are met. Similarly, when a child record is shared at a later time using the **Manage Connections** link in the related list, and the parent record has already been accepted, the child record can be automatically accepted.

In order for a child record to be accepted automatically, the following criteria must be met:

- The parent record must already be accepted in the organization.
- The record must be related as a child to the parent record.
- The child record cannot have two master records.
- The child record cannot have multiple relationships to the same parent object.
- The connection owner must be an active user.
- The owner of the parent record must be an active user.

Important: When child records are accepted automatically, there may be a slight delay before they are visible in the related list of the parent record. Additionally, when a child record is shared using the **Manage Connections** link in the related list of a parent record, there may be a slight delay before the Sent Connection Name displays.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To accept or reject records:

- "Read" and "Edit" on the record

If a child record does not meet the criteria for automatic acceptance, it will need to be manually accepted from its object tab. For example, an opportunity record will need to be accepted from the Opportunities tab. A child record that needs to be manually accepted will display with the parent record name so that it can be properly assigned. For more information, see Accepting Records Shared from a Connection on page 364.

SEE ALSO:

Subscribe to Fields in Salesforce to Salesforce

Publishing Objects in Salesforce to Salesforce

The objects you publish are the objects that your users can share with your business partners using Salesforce to Salesforce. If you have accepted an invitation, created new custom objects, or you have decided to share more information with your business partner, you may want to publish additional objects. Alternatively, you may find that you want to limit the objects you publish to a particular business partner.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To publish objects:
- "Manage Connections"

You can publish the following objects:

- Account
- Attachment
- Case
- Case Comment
- Contact
- Lead
- Opportunity
- Opportunity Product
- Product
- Task
- Custom Object

To define published objects for a connection:

1. Click the Connections tab.
2. Click the name of the connection you want to modify.
3. In the Published Objects related list, click **Publish/Unpublish**.
4. Select the objects you want to publish to your business partner. Deselect objects you no longer want to publish.
5. Click **Save**.

Note: You cannot publish objects that you do not have permission to edit.

When you update your published objects, an email is sent to your business partner notifying them of the change. You can customize this email by editing the Update Connection communication template.

Your business partner is automatically unsubscribed to objects when you:

- Stop publishing an object
- Delete a custom object to which your business partner is subscribed

Once you have published an object, you can manage the fields you publish on that object. For more information on publishing fields, see Publishing Fields in Salesforce to Salesforce on page 368.

Additional Considerations

- All custom objects in your organization appear in the list of objects, however, Salesforce to Salesforce only supports deployed custom objects. You cannot forward a record for a custom object that has not been deployed.

- If you publish the case comment object, all public case comments will be shared with your connections. To avoid sharing a comment on a specific case, select **Make Private**.

SEE ALSO:

Publishing Fields in Salesforce to Salesforce

Forwarding Related Records to a Connection

Publishing Fields in Salesforce to Salesforce

When working with a business partner in Salesforce to Salesforce, you control which objects you share with them by publishing the objects. In addition, you can control which fields you publish on those objects. By default, the following fields are published:

- Account: `Account Name`, and, if you are using person accounts, `Last Name`
- Attachment: `Body`, `Content Type`, `File Name`
- Case: `Subject`
- Case Comment: `Body` and `Published`
- Contact: `Last Name`
- Custom Object: `Name`
- Lead: `Last Name` and `Company`
- Opportunity: `Name`, `Closed Date`, and `Stage`
- Product: `Product Name`
- Task: `Subject`
- Opportunity Product: `Quantity`, `Sales Price`

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To publish fields:
- "Manage Connections"

Salesforce to Salesforce displays the API label for each field.

In addition to those required fields, you may want to publish more fields, or limit the fields you are currently publishing to a particular business partner.

To define published fields for a connection:

1. Click the Connections tab.
2. Click the name of the connection you want to modify.
3. In the Published Objects related list, click **Edit** next to the published object.
4. Select the fields you want to publish to your business partner. Deselect fields you no longer want to publish.
5. Click **Save**.

Note: You cannot publish fields that you do not have permission to edit.

Changes to fields may not show up in the subscribing connection for up to 15 minutes while Salesforce refreshes the cache. This cache enables us to support larger transaction volumes and reduce the number of API calls that count against your organization's limits.

You cannot publish rich text area (RTA) fields.

Geolocation fields and latitude and longitude on standard addresses aren't supported in Salesforce to Salesforce.

When you change which fields you publish, an email is sent to your business partner notifying them of the change. You can customize this email by editing the Update Connection communication template.

Your business partner is automatically unsubscribed to fields when you:

- Stop publishing a field
- Delete a custom field to which your business partner is subscribed
- Change the type of a field to which your business partner is subscribed
- Change the size or precision of a long text area, text, percent, number, or currency field.

These fields remain published, but your business partner must re-subscribe to them.

Occasionally, new releases of the Salesforce service include new standard fields. Because Salesforce organizations around the world aren't upgraded to new releases simultaneously, you can't publish these new fields to a business partner until their organization is upgraded. Service upgrades occur during scheduled system maintenance periods. To view the system maintenance schedule, go to `trust.salesforce.com`.

Other Tips and Considerations

- When publishing fields, consider sending your business partner information about the fields. This helps them to create a mapping strategy that makes sense for your program.
- Translate your published custom field names into the languages your partners use. This allows them to see the field names in their own language.
- If you're using person accounts, and your connection has not enabled person accounts, the person account `Last Name` is used as the `Account Name` when you share a record. If your connection enables person accounts, they are automatically subscribed to `Last Name`. Any changes to `Last Name` and `Account Name` are synchronized.

SEE ALSO:

Managing Connections

Subscribe to Fields in Salesforce to Salesforce

Making Records Available to a Connection

Salesforce to Salesforce allows you to share records with business partners to whom you are connected. There are two ways to share records: forward records directly to connections, or assign records to a queue of connections. You can share the same records with multiple connections. Once shared, connections must choose to accept the records.

Note: Don't forward a record to the connection that originally shared it. Doing so causes errors when Apex triggers run.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign records to a connection:
- "Read" and "Edit" on the record

To stop sharing a record:
- "Read" and "Edit" on the record

To forward multiple records to a connection:
- "Manage Connections"

Sharing a Record with Connections

You can share records with business partners to whom you are connected. You can only forward records that you or your subordinates own; System Administrators can forward all records.

Note: Any lead record you are forwarding must include a populated `Company Name` field.

You cannot forward a record for a custom object that has not been deployed.

1. To forward a record and its related records:
   - View the record's detail page.
   - In the External Sharing related list, click the forward button.
2. To forward multiple records to connections:
   - Select the tab of the type of record you want to forward.
   - Select a list view from the `View` drop-down list, then click **Go!**.
   - In the list view, select the checkboxes next to the records you want to forward. To select all records, select the checkbox in the column header.
   - Click **Forward to Connections**.
3. Select the connection(s) to forward the record to in the Available Connections list.
4. Click the Add arrow ( ) to move the connection(s) to the Selected Connections list.
5. Optionally select **Send Notification Email (new invitees only)** to send email notifying the connection's representative that you forwarded the record. Only new recipients of the record receive the email; connections that you previously forwarded the record to don't receive another email.
6. Optionally select the checkboxes next to related records you want to forward. You can also share related records separately.
7. Click **Save**.

The records are forwarded to the specified connections.

Tip: Certain fields, like currency fields, must be mapped a certain way in Salesforce to Salesforce. For details, see Best Practices for Mapping Fields in Salesforce to Salesforce.

Sharing Attachments

You can share attachments as child records of any supported object. Attachments are automatically accepted by a connection, providing the following criteria are met:

- The Attachment object type is published to your connection and your connection is subscribed to the object.

- The parent record for the attachment is shared with the connection.
- The attachment is not marked "Private."
- The `Share With Connections` checkbox on the attachment is selected.
- The attachment is 20 MB or less.

Stop Sharing Records

To stop sharing a record:

Note: You can only stop sharing records that you or your subordinates own. System Administrators can stop sharing all records.

1. View the record's detail page.
2. In the External Sharing related list, click **Stop Sharing**.

When you stop sharing the record with a connection, changes to the record in your organization are not reflected on the record in the connection's organization. The shared record is not deleted from the other organization.

SEE ALSO:

Sharing Records Using Salesforce to Salesforce

External Sharing Related List

External Sharing Related List

Salesforce to Salesforce allows you to share records with one or more connections; each connection has the opportunity to accept records you share with them, even if other connections have already accepted the same record. When working with a record that you have received from a connection, or a record that you have shared with a connection, the record detail page includes a header indicating the record's status. The record may also contain the External Sharing related list, which shows details on which connections this record is shared with, and the sharing status.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To see the external sharing status of a record
- "Read" on the record

To stop sharing a record:
- "Manage Connections"

Externally shared records will have one of the following statuses:

Active (sent)
The record has been shared and accepted by an external organization.

Active (received)
The record has been sent to you from an external organization, and it has been accepted.

Pending (sent)
The record has been shared, but not accepted by an external organization.

Inactive
The record is no longer shared with an external organization.

Inactive (deleted)
The record was accepted by an external organization, but that organization has deleted the record.

Inactive (converted)
The record is a lead that was accepted by an external organization and converted into an opportunity by that organization. When a lead is converted, Salesforce to Salesforce inactivates the shared record so that it is no longer updated in the subscribing connection.

Note: If you change the Lead Status during conversion, it is not reflected in the subscribing connection.

SEE ALSO:

Sharing Records Using Salesforce to Salesforce

Making Records Available to a Connection

Forwarding Related Records to a Connection

Salesforce to Salesforce allows you to forward records that are children of records already shared with connections. You select the child record types that can be shared when you share a parent record.

Child records are automatically shared with connections after the parent record has been accepted by the connection, provided certain criteria are met.

Consider the following tips when sharing related records:

- A related record will no longer be shared with a connection if the related record is edited from an unshared record.
- A maximum of 100 tasks per related record can be shared. This maximum includes open and closed tasks.

To stop sharing a related record from its parent record detail page:

1. Select the parent record's detail page.
2. In the related list of the record you want to stop sharing, click **Manage Connections** in the Sent Connection Name column. For example, to stop sharing a contact related to an account, click **Manage Connections** in the Contacts related list on the account detail page.
3. Select the connection(s) that you want to stop sharing with in the Selected Connections list.
4. Click the Remove arrow ( ) to move the connection(s) to the Available Connections list.
5. Click **Save**.

Alternatively, to stop sharing a related record from its detail page:

1. View the record's detail page.
2. In the External Sharing related list, click **Stop Sharing**.

To stop sharing a case comment or attachment, you must make the records private.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign records to a connection:

- "Read" and "Edit" on the record

To forward related records to a connection:

- "Read" and "Edit" on the record

To stop sharing a record:

- "Read" and "Edit" on the record

Sharing Opportunity Products with Connections

An opportunity product is related to both opportunity and product records. For this reason, it can only be shared as a child record of a shared opportunity, provided the associated product is also shared.

If all of the following criteria are met, opportunity products are automatically shared with connections.

- The Opportunity Product object type is published to your connection, and your connection has subscribed to the object.
- The opportunity and the product associated with the opportunity product are shared with your connection.
- In the connection's organization, the opportunity is associated with an active price book during acceptance.
- In the connection's organization, the product is associated with the same active price book as the opportunity.
- In the connection's organization, the product is active.

- In both organizations, the opportunity currency is the same.

When sharing opportunity products, keep these additional rules in mind:

- If quantity or revenue schedules are enabled in the connection's organization, Quantity and Sales Price fields won't be updated in their organization.
- If the price book associated to the opportunity product is changed or deleted in one organization, the opportunity product will no longer be shared.
- If the opportunity is no longer shared, the opportunity product will no longer be shared.

Note: Currently, if you edit the stage of multiple opportunity records by performing a global find and replace, that change will not be reflected in organizations that you had forwarded the records to in Salesforce to Salesforce.

For example, suppose you perform a global find and replace which causes the stage of all inactive opportunities to change from `Inactive` to `In Review`.

If any of the affected opportunities had been forwarded to a business partner in Salesforce to Salesforce, those opportunities will still be in the `Inactive` stage in your partner's Salesforce organization. For the stage change to be reflected in their organization, they would need to open each affected opportunity, click **Edit**, and click **Save**.

Sharing Case Comments with Connections

You can share a case comment as a child record of a case. Case comments are automatically accepted by a connection, providing the following criteria are met:

- The Case Comment object type is published to your connection, and your connection has subscribed to the object.
- The case to which the case comment is associated is shared with the connection.
- The case comment is not marked "Private."

SEE ALSO:

Sharing Records Using Salesforce to Salesforce

Tips for Using Salesforce to Salesforce

Managing Connections with Custom Reports

Use custom reports to keep track of Salesforce to Salesforce activity and updates. For details, see Reporting in Salesforce to Salesforce.

EDITIONS

Available in: Salesforce Classic

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

Workflow is available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions

Managing Records

- If validation rules prevent you from accepting shared records, create a validation rule with the `Received Connection Name` field not equal to null; this will ignore validation rules for records you accept from your connections. To create this rule, use the following formula:

```
IF(OR(ISNEW(), ISNULL(Id)), if(ConnectionReceivedId =null,
TRUE, FALSE),NOT(AND(ISCHANGED(ConnectionReceivedId),
NOT(ConnectionReceivedId = null))))
```

  You should also create a similar rule for any Apex trigger that has validation checks.
- To track records that you are sharing with connections, create a custom report. For example, you can create a custom report that shows all the leads that you have shared with connections that were deleted by the connection:
  - Use the Leads and Connections report type
  - Enter the filter criteria "Status equals Inactive (deleted)"
- Make your view of unaccepted records from connections more useful by creating a custom list view. For example, create a list view that hides unaccepted leads from connections that are more than a month old.

  Note: You must have the "Manage Connections" permission to create these list views.
- Only users with the "Manage Connections" permission can view objects shared from a connection, therefore, you should create custom list views that you can assign to people who need access to this information.
- If you are expecting to receive large volumes of records from a connection, enable `Auto-Accept` for the appropriate objects on page 360. For example, if a connection shares a large number of leads with your organization on a regular basis, select the `Auto-Accept` checkbox next to Opportunity on the Add or Remove Subscribed Objects page.
- To see changes made by a connection, enable field tracking on the object and add the history related list to page layouts. Another option is to create a custom history report that includes the `Received Connection Name` field.
- To automatically assign all incoming leads or cases to a specific user, create an assignment rule that includes the following rule entries:
  - *`Received Connection Name contains name of connection`*
  - *`Created By contains Connection User`*

  You can do the same with escalation rules.
- If you want to assign a case to a connection using an escalation rule on the case, you must assign the case to a queue where the connection is a member. For example, if you have a connection that acts as your third-party service agency and all cases meeting certain criteria should be escalated to this connection, you must:
  - Create a queue that contains the connection as a member.
  - Create an escalation rule with the appropriate criteria.
  - Add an escalation action that automatically assigns cases meeting the specified criteria to that queue

Other Tips

- If you want to connect to partners but aren't sure if they use Salesforce, you can use connection finder to find out.
- When you convert a lead, Salesforce to Salesforce inactivates the shared record and updates the External Sharing related list in your connection's lead record with an Inactive (converted) status. Due to inactivation of the shared record, changes to the Lead Status during conversion aren't reflected in your connection's lead record.

- To learn how to use workflows to automate updates to records and connections in Salesforce to Salesforce, see Using Workflows in Salesforce to Salesforce.

Reporting in Salesforce to Salesforce

To track Salesforce to Salesforce activity and updates, create custom reports.

When it comes to using custom reporting to efficiently manage your Salesforce to Salesforce connections, the possibilities are endless! Here are some ways you might use custom reports in Salesforce to Salesforce:

- Create a custom report with the Connections with Accounts report type to track connection activity and other connection details. The report only displays connections that are associated with accounts.
- Create custom report types to view connection information for each of your published or subscribed objects.
- Create a custom report to view records that are shared with multiple connections. Alternatively, to view records shared with multiple connections in a list view, add the `Sent Connection Name` field to an existing or new view and verify that enhanced lists are disabled.
- Create a custom report with the Connections with Leads report type to view all leads that you shared with connections and that the connection then deleted.

EDITIONS

Available in: Salesforce Classic

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

Workflow is available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions

Using Workflows in Salesforce to Salesforce

You can use workflow to automate updates to records and connections in Salesforce to Salesforce.

Workflow rules are only triggered for records shared in Salesforce to Salesforce when:

- You accept a parent record
- A child record is inserted
- You are subscribed to the fields that are configured to trigger the workflow rules

Some suggestions for criteria for workflow rules for Salesforce to Salesforce include:

- `Received Connection Name` field on leads, opportunities, and custom objects
- Current User equals *`pnet`*
- `Last Modified By` field equals Connection User

For example, you can create a task for a user every time a connection updates a lead:

1. Create a workflow rule with the following criteria:
   - Evaluation criteria: `Evaluate the rule when a record is: created, and every time it's edited`
   - Run the rule when `criteria are met`.
   - Rule criteria: "Lead: Last Modified By equals Connection User".
2. Add a workflow task.

EDITIONS

Available in: Salesforce Classic

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

Workflow is available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions

You can use workflows for many Salesforce to Salesforce processes, including updating values on picklists when a connection has edited the field. When you accept a record, workflow rules are only triggered by the following fields:

Note: If your organization is set up to automatically accept records, workflow rules are triggered by any field to which you subscribed.

Object	Fields Triggering Workflows
Account	• Account Name • City • Country • Received Connection Name • Sent Connection Name • State • Type
Case	• Case Number • Priority • Status • Subject • Type
Contact	• Email • Last Name • Mailing Address • Phone • Title
Lead	• Company • Email • Industry • Lead • Lead Source • Name • No. of Employees • Phone • Received Connection Name • Sent Connection Name • State • Status • Title
Opportunity	• Account Name • Amount • Close Date • Name • Received Connection Name

Object	Fields Triggering Workflows
	• Sent Connection Name • Stage
Custom Object	• Connection Name • Name • Sent Date

All subsequent updates made to any fields on accepted records will trigger workflow rules.

Note: In some cases, it makes sense to use an Apex trigger instead of a workflow. Suppose you have a workflow rule that updates a secondary field, **field B**, when **field A** is updated. Even if your Salesforce to Salesforce partner subscribed to fields A and B, updates to field B that are triggered by your workflow rule aren't sent to your partner's organization. This prevents a loop of updates.

If you want secondary field updates like this to be sent to your Salesforce to Salesforce partners, replace the workflow with an Apex trigger that uses post-commit logic to update the secondary field.

Verifying Your Business Partners Use Salesforce

About Connection Finder

If your partners use Salesforce, it is beneficial to connect your Salesforce organizations so that you can share records and collaborate on relevant business processes. Before you can connect, you need to find out if your partners use Salesforce. Use Connection Finder to email your partners a link to a simple survey asking if they use Salesforce. Survey responses are recorded on the contact and account records for each partner. Once you know a partner's status, you can invite them to connect using Salesforce to Salesforce.

EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

Finding Out if Your Partners Use Salesforce
Setting Up Connection Finder
Tips and Additional Considerations for Connection Finder

Setting Up Connection Finder

Connection Finder allows you to email surveys to find out if your partners are Salesforce customers. Once you know a partner's status, you can invite them to connect using Salesforce to Salesforce.

To use connection finder, you must perform the following activities:

1. Enable connection finder in your organization.
2. Configure connection finder settings.
3. Add the **Find Connections** button to the contacts list view by customizing the search layout. Add the button to the contact detail page by customizing the contacts page layout.
4. Add the `Uses Salesforce` field to the contacts page layout.
5. Add the `Salesforce Customer` field to the account page layout.

   Note: The `Uses Salesforce` and `Salesforce Customer` fields also appear on the contact and account records in any Customer Portal or partner portal you set up.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable Connection Finder and edit settings:
- "Modify All Data"

Enabling Connection Finder

To activate connection finder:

1. From Setup, enter *`Connection Finder`* in the `Quick Find` box, then select **Salesforce to Salesforce Connection Finder**.
2. Click **Edit**.
3. Select `Enabled`.
4. Click **Save**.

The connection finder settings are now available to configure. Additionally, the default email template and required related fields are created and available for use.

Note: Disabling connection finder inactivates outstanding surveys and removes the **Find Connections** button. The `Uses Salesforce` and `Salesforce Customer` fields remain on contact and account records, respectively.

Configuring Connection Finder Settings

You can determine the content and look of the email you send to partners.

1. From Setup, enter *`Connection Finder`* in the `Quick Find` box, then select **Salesforce to Salesforce Connection Finder**.
2. Click **Edit**.
3. Select an email template.

   The default connection finder template is automatically selected. You can also create custom email templates for your survey.

   Note: Custom email templates must contain the survey URL. `{!Contact.PartnerSurveyURL}` is available as a contact merge field when creating templates.

4. Optionally, select a logo using the lookup.

   Note: You must first upload your logo to the Documents tab and mark it as `Externally Available Image`.

   Salesforce recommends adding a branded logo, as it appears at the top of the survey page. If no logo is selected, the logo portion of the survey page remains blank.

5. Click **Save**.

Finding Out if Your Partners Use Salesforce

If your partners use Salesforce, it is beneficial to connect your Salesforce organizations so that you can share records and collaborate on relevant business processes. Before you can connect, you need to find out if your partners use Salesforce. Use Connection Finder to email your partners a link to a simple survey asking if they use Salesforce. Survey responses are recorded on the contact and account records for each partner. Once you know a partner's status, you can invite them to connect using Salesforce to Salesforce.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To email partners asking if they use Salesforce:

- "Send Email" (single recipient)

  OR

  "Mass Email" (multiple recipients)

1. In the Contact list view, select the partners you want to survey and click **Find Connections**. Alternatively, on a contact detail page, click **Find Connections**.

   Note: **Find Connections** doesn't appear if:

   - The contact record doesn't have a valid email address
   - The contact is not associated with an account

   If the contact is a person account, **Find Connections** appears in the list view, but shows an error message if the user clicks the button. **Find Connections** does not appear on the contact detail page.

2. Enter a subject for the email.
3. Edit the body text, supplied by the default template, or click **Change Template** to choose a different email template.

   Note: The default email template is selected by your administrator. You can select a different template or edit the body text, however, you must include the survey URL: `{!Contact.PartnerSurveyURL}`.

   You cannot edit body text if you chose multiple recipients.

4. Click **Check Spelling** to spell check the body text.
5. Click **Preview** to see what your email will look like to the recipient.
6. Click **Send**.

The email is sent to the selected partners, who have 90 days to respond to the survey before the link becomes invalid. The partner's response is recorded in the `Uses Salesforce` field on the partner's contact record and the `Salesforce Customer` field on the account record. A closed activity is also added for the contact.

Tip: Salesforce recommends creating a custom list view or custom report so that you can track customer responses in one convenient location.

If the partner's organization uses Salesforce, the survey displays a section asking if the recipient has administrator privileges for Salesforce. If not, the recipient can optionally provide their administrator's contact information and a new contact record is created in Salesforce for that user, unless one already exists.

Note: This section doesn't appear if a contact for that partner, whose `Uses Salesforce` value is *`Yes, admin user`*, already exists in your organization.

Tips and Additional Considerations for Connection Finder

EDITIONS

Available in: Salesforce Classic

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

- Create a custom list view or custom report to track your survey responses in one location. Add the `Uses Salesforce` field to contact list views and reports. Add the `Salesforce Customer` field to account list views and reports.
- Create translated versions of the default connection finder template to send to international partners. To do so, clone the default template, make the necessary language changes, and include the survey URL: `{!Contact.PartnerSurveyURL}`. You can then choose the appropriate template when sending out requests to your partners.

  Note: The survey page is in English, but includes a `Language` drop-down so that recipients can view the survey in their native language.
- When creating validation rules for the `Uses Salesforce` field, use the API value, not the label seen in the user interface. For example:

```
CONTAINS(TEXT(UseSalesforce ), 'YesNotAdmin')
```

`Uses Salesforce` **drop-down value**	**API value**
No	No
No Response	NoResponse
Not Sure	NotSure
Yes, admin user	YesAdmin
Yes, not admin user	YesNotAdmin

- If a partner provides details for their Salesforce administrator, Salesforce checks to see if there is already a contact in your Salesforce organization with that email address. If so, the `Uses Salesforce` field on the contact record is set to *`Yes, admin user`*. If the field is already set to *`No`*, it is not updated.

  Note: A partner can only add an administrator if one does not already exist as a contact in your organization.
- The `Salesforce Customer` field is dependent upon the values in its contacts' `Uses Salesforce` field.

Participating in Social Networks from Within Salesforce

Salesforce for Twitter and Facebook Overview

EDITIONS

Available in: Salesforce Classic

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

Salesforce for Twitter and Facebook gives you an easy way to interact with customers and prospects in real-time on Twitter and Facebook, directly from within Salesforce.

Salesforce for Twitter and Facebook users can search, monitor, join, and respond to social media conversations that are relevant to your company, all from within Salesforce. Users can also:

- Find out what people are saying about your company now
- Create cases, contacts, and leads from Tweets and Facebook wall posts and comments
- Share information with Twitter and Facebook communities

- Engage with millions of people sharing opinions, asking questions, and looking for help

You can enable Salesforce for Twitter and Facebook by downloading the free app from the AppExchange. You can find more documentation from the Resources section of the app listing for Salesforce for Twitter and Facebook.

Collaborating with Partners to Increase Sales

Viewing and Adding Partners

The opportunity and account detail pages include a Partners related list for viewing and adding partner relationships.

- To view account information for a specific partner, click the partner's name in the Partners related list.
- Click **Del** next to a partner to the partner relationship.

  Note: If you change the account for an opportunity that has partners, all partners are deleted from the Partners related list.

- To add a partner to an opportunity or account:
  1. Click **New** in the Partners related list.
  2. For opportunities only, select the `Primary` option to indicate the primary partner for the opportunity, if applicable.

     An opportunity can have only one primary partner. Setting a new primary partner automatically removes the "Primary" status from any existing primary partner.

     Marking a partner as "Primary" allows you to report on the partner in all of the opportunity reports.

  3. In the `Partner` column, enter the name of an existing account by typing into the box or clicking the lookup icon to perform an account search. Alternatively, click **New** from the lookup dialog to create a new account.
  4. In the `Role` column, choose the role that the partner account plays in the current account or opportunity.

Note: Selecting a partner on an account or opportunity automatically creates a reverse partner relationship so that both accounts list the other as a partner. The role you select is applied to the partner account; in the current account, the reverse role is applied.

Your administrator sets the available roles and the corresponding reverse roles when editing the `Partner Role` picklist value.

Your administrator has the ability to customize the columns that display in the related list by editing the page layout. .

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 add partners to an account:

- "Edit" on accounts

  AND

  "Read" on opportunities

To add partners to an opportunity:

- "Read" on accounts

  AND

  "Edit" on opportunities

Sharing Information with Partners

Partner Portal Overview

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

Partner relationship management allows companies to maximize the return on their channel investments and increase channel revenues by managing, tracking, and forecasting channel business alongside their direct sales business. It also helps partners sell more effectively, close more business, and achieve greater profits.

Empowering your partners with your Salesforce data can help you sell more without spending more. However, you want to control the information your partners can access, and you want your partners to work within an application that uses your company's branding. You can accomplish this by granting your partners access to a Salesforce partner portal.

A partner portal allows partner users to log in to Salesforce through a separate website than your non-partner users. Partner users can only see the data that you have made available to them. Furthermore, partner users can only manipulate data if you give them the appropriate user permissions.

You can customize the web portal to show your branding, and you can configure it to meet your functional and security needs, including enabling single sign-on for portals, so your partners have a single log in to access Salesforce. You can also have multiple portals to meet your different requirements for working with partners.

Creating Partner Accounts

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 view accounts:
- "Read" on accounts

To create accounts:
- "Create" on accounts

To enable a partner account:
- "Manage External Users"

Partner accounts are Salesforce accounts that a channel manager uses to manage partner organizations, partner users, and activities when using the partner portal. Each company with which you partner should be added to Salesforce as a business account. Channel managers are associated with partner accounts by account ownership. A channel manager who owns a partner account can access all the information and manage all the activities of the partner account, including that of any partner user associated with the partner account. This allows the channel manager to easily keep up-to-date on partner activities.

Note: 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.

To create a partner account:

1. Create a new business account.

2. Click **Manage External Account** and then, click **Enable as Partner**.
3. A confirmation dialog will open. Select **Yes, I want to enable this account as a Partner Account.**.
4. Click **Confirm**.

Note: If your organization has person accounts, they cannot be used as partner accounts. Only business accounts can be used as partner accounts.

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.

Note: Partner accounts can't be deleted, but can be disabled.

SEE ALSO:

Disabling Partner Accounts

Disabling Partner Accounts

Disabling a partner account disables external users associated with the account. We recommend disabling a partner account only if the account was accidentally enabled for portal access.

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't delete partner accounts, but you can disable them. Disabling the account permanently disables up to 15 external users associated with the account and removes them from all communities, groups, teams, permission sets, and sharing rules that they're associated with. This includes both active and inactive external users. Additionally, roles and groups associated with the account are permanently deleted and not moved to the Recycle Bin.

Note: You can't disable an account if there are more than 15 active or inactive external users associated with it. You must disable the users before disabling the account.

1. Go to the Account detail page for the account you want to disable.
2. Click **Manage External Account**, then click either **Disable Partner Account**.
3. Click **OK** to confirm.

If you decide to enable the account in the future, you can re-enable individual contacts as partner portal users. Re-enabling a contact for a partner portal creates a new partner user and role that is not associated with the previous partner user and role. You can't restore deleted roles and groups.

SEE ALSO:

Creating Partner Accounts

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view accounts:
- "Read" on accounts

To create accounts:
- "Create" on accounts

To enable a partner account:
- "Manage External Users"

Working with 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.

EDITIONS

Available in: Salesforce Classic

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

Channel managers are associated with the partner users they manage by partner account ownership. A channel manager who owns a partner account can access all the information and manage all the activities of the partner users associated with that account.

Some common tasks when managing your partner users include:

- Creating a partner account
- Creating partner users
- Disabling and deactivating partner users
- Assigning leads to partner users
- Assigning events to partner users
- Assigning cases to partner users
- Editing partner user information
- Giving partner users access to your knowledge base
- Enabling partner users to request meetings

In addition, here are some other ways you can work with your partner users:

Enable partner super user access

Partner super users have access to data owned by all partner users and partner super users in the same role and 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.

Assign tasks to partner users

If your partner users have the appropriate field-level security settings, they can view and create activities related to leads or opportunities.

Add tasks to leads or opportunities to remind your partner users of particular tasks you would like them to perform. You can view the activity history for a particular lead or opportunity, or use reports to track activities assigned to partner users.

Partner users can only assign tasks to other users in their partner account or to their channel manager.

Use notes and attachments to communicate with partner users

Partner users can create, view, and edit notes and add attachments from the Notes and Attachments related list on selected detail pages, including lead, solution, and opportunity detail pages. You can use notes and attachments to share documents or information with partner users. If Chatter is enabled for your organization, feed attachments are included in the Notes and Attachments related list. Portal users can download feed attachments, but can't preview, edit, or delete them.

The size limit for an attached file is 5 MB.

Click Log in to Portal as User to troubleshoot

When you view the contact detail page for a partner user, you can click **Manage External User**, then **Log in to Portal as User**. This opens a new browser window and logs you into the portal as the partner user. Click this button to troubleshoot any issues partner users are experiencing. You may also click this button to ensure that your portal is configured appropriately. The **Log in to Portal as User** button is only available if you have the "Manage External Users" permission and one of the following: the "Modify

All Data" permission or you are the partner account owner or higher in the role hierarchy. The **Log in to Portal as User** button does not display if you do not meet these requirements, or if the portal user is inactive.

Reset a partner user's password

When you view the user detail page for a partner user, you can click **Reset Password** to reset the partner user's password.

Partner users can reset their own password by clicking **Forgot Password?** on the partner portal login page.

Expose a solution in the portal

Select `Visible in Self-Service Portal` on the solution.

Add products to opportunities

If the Products related list is available to partner users on opportunities, then you can add products to the opportunities for your partners.

Assigning Leads to 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.

A vital piece of partner relationship management is lead assignment. Your partners can only work with leads that are assigned to them. There are two ways to handle lead assignment for partner users:

- Assign each lead to an individual partner user
- Assign leads to a lead queue and allow partner users to claim leads from the queue

In addition, you can create lead assignment rules that automatically assign leads to partner users or queues based on certain properties of those leads.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign leads to partners:
- "Edit" on leads

Note: Assignment rules cannot be triggered by actions in the portal.

Assigning a lead to a partner user or partner lead queue is just like assigning a lead to any other user or queue.

Leads assigned directly to a user or a queue that is not part of the lead pool are shown on the portal Leads tab. The partner user can see these by selecting an appropriate list view. Until a partner user has reviewed a lead, it displays in bold, and is in the My Unread Leads list view.

If a lead is assigned to a queue that is in the lead pool, the lead displays in the Available Leads list on the Home tab of the portal.

Tip: Assign partner leads to a single partner user (for example, a sales manager) in the partner account to enable that person to manage lead assignment for the partner users in that account.

Using Calendars in the 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.

If you have added the calendar to the Home page layout for partner portal users, you can assign events to them, and partner portal users with the "Edit Events" permission can create and edit their own events. Note that the following event and calendar features are not supported in the partner portal: spell check, event updates, enhanced list views, drag-and-drop scheduling, calendar sharing, and hover details.

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

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign events to partners:
- "Edit Events"

Assigning Cases in the 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.

Before you can assign cases to partner portal users, you must configure cases for partner users. In addition to the required user permissions for this feature, you must have access to view the cases you're updating.

To assign a case to a partner user:

1. On the case detail page, click **[Change]** next to the `Case Owner` field.
2. Select Partner User from the Owner drop-down list and enter the name of the partner user.
3. Optionally, select the `Send Notification Email` checkbox to send an email to the new owner.
4. Click **Save**.

The partner user will be able to view and edit the case from the partner portal.

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

You can also create case assignment rules and escalation rules that automatically assign cases to partner users or queues based on certain properties of those cases.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign cases to partners:
- "Edit" on cases

  AND

  "Transfer Cases" or "Transfer Record"

SEE ALSO:

Partner Portal Overview

About Mobile Access for 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.

EDITIONS

Available in: Salesforce Classic

Available for an additional cost in: **Enterprise** and **Unlimited** Editions

You can enable your partner users to view and modify partner portal data on their BlackBerry®, iPhone®, or Treo® devices using the Salesforce Classic Mobile client application. By granting mobile access to your partner users, you provide them with the flexibility to access their partner portal data from any location, at any time.

Due to memory and screen size limitations of mobile devices, Salesforce Classic Mobile uses data sets, or subsets of Salesforce data, to determine the information that is available to mobile users. Partners using Salesforce Classic Mobile will only be allowed to view objects they are able to view in the partner portal, even if Salesforce Classic Mobile is configured with data sets that are less restrictive. Conversely, access to partner portal data can be limited by configuring more restrictive Salesforce Classic Mobile data sets.

SEE ALSO:

Partner Portal Overview

Sharing Information with Partners FAQs

Can I enable Salesforce for my Partners?

Yes, you can use Communities to connect with your partners and share appropriate Salesforce data.

You can customize communities to meet your business needs, including:

- Choosing which members from your company and which partners can join
- Selecting which Salesforce features to include
- Applying your company's branding so that the community is recognizable
- Enabling your employees and partners to collaborate on Chatter and business processes (records)
- Enabling login options based on SAML for single sign-on for people outside your company
- Enabling users to self register for a community so that the administrator isn't responsible for adding users

To get started using Communities, contact your Salesforce Account Executive.

Can I share my Salesforce data with other organizations that also use Salesforce?

Yes.

Salesforce to Salesforce enables business collaboration both within and across Salesforce organizations. For example, you can share lead and opportunity data with business partners and manage your entire pipeline and programs within Salesforce.

Using Salesforce-Integrated Email

Email Management

Salesforce offers several ways for you to manage email and increase productivity. Manage emails and templates. Relate emails to Salesforce records. To make sure that you get the information you're looking for, learn about each type, and then explore further.

EDITIONS

Available in all editions

IN THIS SECTION:

Manage Email and Templates in Lightning Experience

If you're using Lightning Experience, you can email contacts, leads, and your own colleagues directly from account, person account, contact, lead, opportunity, campaign, and case records you have access to. Or send to any valid email address. Attach files. Automate with merge fields. Use a template if you want to: either choose from the samples we offer or create your own. Templates are shared automatically with your organization.

Manage Email in Salesforce Classic

If you're using Salesforce Classic, use Email Author to email your contacts, leads, person accounts, and coworkers directly from account, contact, lead, opportunity, case, campaign, or custom object pages.

Experience Salesforce in Microsoft® Email Applications

Relate important Microsoft emails to Salesforce records, like contacts, leads, and opportunities. And see related Salesforce content directly in your Microsoft email applications.

Relate Emails to Salesforce Records with Email to Salesforce

Relate emails to leads, contacts, and opportunities or to other specific records in Salesforce. That way, it's easy to track your sales-related communications.

Manage Email and Templates in Lightning Experience

If you're using Lightning Experience, you can email contacts, leads, and your own colleagues directly from account, person account, contact, lead, opportunity, campaign, and case records you have access to. Or send to any valid email address. Attach files. Automate with merge fields. Use a template if you want to: either choose from the samples we offer or create your own. Templates are shared automatically with your organization.

EDITIONS

Available in: Salesforce Lightning Experience

Developer, Enterprise, Professional, Performance, and Unlimited editions

IN THIS SECTION:

Access and Sharing for Email Merge Fields, Templates, and Attachments

Using integrated email in Lightning Experience? It's important to understand how access and sharing work for merge fields, templates, and attachments.

Send Email from a Record

Send rich-text email, including attachments, directly from the record you're on. Send to customers, colleagues, or any valid email address. Email is available for a number of items, including accounts, person accounts, contacts, leads, opportunities, campaigns, and cases. When you send an email, Salesforce creates a task record to track the action and store its content. Find a link to the task record in the Activity feed of the record the email was sent from or on related records.

Find Email Sent From a Salesforce Record

After you send an email, Salesforce creates a task record to track the action and store its content. The activity feed includes a link to that task. If you sent email to a contact or lead, each of those records includes a link to the task. For emails that *don't* include any contacts or leads as recipients, the task and the feed item are created for the object you were on when you sent the email. If you use Automatic BCC, as defined in your email settings, you'll receive a copy of the email in the inbox of your specified return address.

Create a Template to Standardize Common Emails

Create email templates to save time and standardize email sent by you or others in your organization. Use merge fields if you need them. Your page layout and field-level security settings determine which fields are available for merging. Templates you create are automatically public: they're available for use by others in your organization.

Use a Template to Standardize Email You Send

Use a template to save time and standardize email you send. You can create your own or use templates created by others in your organization. Or use one of the samples Salesforce provides. If you select a template that has attached files, you need file access to include them in emails you send from that template. If you need file access, we'll let you know.

Access and Sharing for Email Merge Fields, Templates, and Attachments

Using integrated email in Lightning Experience? It's important to understand how access and sharing work for merge fields, templates, and attachments.

EDITIONS

Available in: Salesforce Lightning Experience

Developer, Enterprise, Professional, Performance, and Unlimited editions

Merge Fields

Merge fields are available from the Account, Contact, Opportunity, Lead, Campaign, Case, and User objects, as well as from the Person Account record type. From those items, most commonly used standard fields (and some custom fields) are available as merge fields. From that set of fields, some fields may not be available to individual users because of field-level security settings. Contact merge fields are not available for person accounts.

Templates

- Templates created in Salesforce Classic can't be used in Lightning Experience, and vice versa.
- Templates created from one object are available for that object only. For example, a template created for leads isn't available for selection from an opportunity record.
- Templates you create are automatically public: they're available for use by others in your organization.

Attachments

- Salesforce Files and Content Deliveries must be enabled before you can select and attach files from Salesforce Files. If these features are not enabled, users will be able to upload attachments only.
- Any attachment larger than 3 MB is sent as a content delivery link, not as a file. For emails with multiple attachments, if the aggregate size of all attachments is greater than 3 MB, then *all* attachments are sent as content delivery links.
- If you don't have access to a file, you can't attach it to an email or a template. We let you know if you need access, so you can ask the file's owner.
- Access becomes public, via the link, for files attached to emails from Salesforce Files. Public access allows anyone with the link to view, share, and download the file.

Send Email from a Record

Send rich-text email, including attachments, directly from the record you're on. Send to customers, colleagues, or any valid email address. Email is available for a number of items, including accounts, person accounts, contacts, leads, opportunities, campaigns, and cases. When you send an email, Salesforce creates a task record to track the action and store its content. Find a link to the task record in the Activity feed of the record the email was sent from or on related records.

To attach files to an email or use a template with attached files, you need file access. If you don't have access, we'll let you know.

1. Open the record from which you want to send the email.
2. Click the Activity tab and then click **Email**.

   Tip: If you prefer to compose from a window, click the arrow button to pop out your email. While the composer window is active, you can scroll the record page to view details and other information or navigate anywhere else in Salesforce.

3. Write your email. If the recipient has opted out of receiving mass email or previous emails to the address have bounced, you'll see an indicator next to their name.
4. Add attachments if you need to.
5. Preview and send.
   You'll find a link to the email in the activity feed under Past Activity. You can also find a link in the activity feed on related records. If you use Automatic BCC, as defined in your email settings, you'll receive a copy of the email in the inbox of your specified return address.

EDITIONS

Available in: Salesforce Lightning Experience

Developer, Enterprise, Professional, Performance, and Unlimited editions

USER PERMISSIONS

To send email:
- "Send Email" permission and access to the record the email is sent from.

To attach files to email or templates:
- Access to the file you're attaching.

Example: Jane is working a deal, or opportunity, to sell 600 widgets to Acme Corporation. The contact for Acme is John Stamos and the opportunity record is Acme 600 Widgets. Jane needs to send an email to John, including a term sheet, and she wants that activity associated with the 600 widgets opportunity record. It's also handy to have email activity available from John's contact record. Jane opens the Acme 600 Widgets record and writes the email, attaching the term sheet. After she sends the email, she can find a link to a task record with email details from the feeds on the Acme 600 Widget opportunity record and the John Stamos contact record.

Find Email Sent From a Salesforce Record

After you send an email, Salesforce creates a task record to track the action and store its content. The activity feed includes a link to that task. If you sent email to a contact or lead, each of those records includes a link to the task. For emails that *don't* include any contacts or leads as recipients, the task and the feed item are created for the object you were on when you sent the email. If you use Automatic BCC, as defined in your email settings, you'll receive a copy of the email in the inbox of your specified return address.

1. Open either the record that was originally open when you wrote the email or the record for the contact or lead you sent it to.
2. Click the Activity tab to find the email in Past Activity.
3. Click the email link to open its task record, where you can view the message and related details. And if you use Automatic BCC, you can find the sent email in your inbox.

EDITIONS

Available in: Salesforce Lightning Experience

Developer, Enterprise, Professional, Performance, and Unlimited editions

USER PERMISSIONS

To view sent email:
- "View Tasks" permission and access to the record the email was sent from.

Create a Template to Standardize Common Emails

Create email templates to save time and standardize email sent by you or others in your organization. Use merge fields if you need them. Your page layout and field-level security settings determine which fields are available for merging. Templates you create are automatically public: they're available for use by others in your organization.

Templates created from one object are available for that object only. For example, a template created for leads isn't available for use from an opportunity record.

Tip: Found a great template that needs updates or modifications? Select that template, then edit and save. If you want to keep the original, save your changed version as a new template.

1. Open a record, such as an opportunity or account, that offers email.
2. Click the Activity tab, then click the Email tab.
3. Compose the email to use as your template. Templates can include all the features of other email: rich text, merge fields, and attachments. If you need to navigate the record or other Salesforce pages as you work, pop out the composer window.
4. Click the Templates icon and then save the template as new.

EDITIONS

Available in: Salesforce Lightning Experience

Developer, Enterprise, Professional, Performance, and Unlimited editions

USER PERMISSIONS

To create email templates:
- "Send Email"

To attach files to email or templates:
- Access to the file you're attaching.

To delete email templates:
- "View All Data" or template ownership.

Use a Template to Standardize Email You Send

Use a template to save time and standardize email you send. You can create your own or use templates created by others in your organization. Or use one of the samples Salesforce provides. If you select a template that has attached files, you need file access to include them in emails you send from that template. If you need file access, we'll let you know.

1. Open the record from which you want to send email.
2. Click the Activity tab, then click the Email tab.
3. To insert a template, click the Templates icon. Select the template you want and its contents appear. Edit your email as needed, then preview and send!

EDITIONS

Available in: Salesforce Lightning Experience

Developer, Enterprise, Professional, Performance, and Unlimited editions

USER PERMISSIONS

To send email:
- "Send Email"

To send emails or use templates with attachments:
- Access to the file you're attaching.

Manage Email in Salesforce Classic

If you're using Salesforce Classic, use Email Author to email your contacts, leads, person accounts, and coworkers directly from account, contact, lead, opportunity, case, campaign, or custom object pages.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions

Mass email not available in: **Personal**, **Contact Manager**, and **Group** Editions

IN THIS SECTION:

Send Email in Salesforce Classic

Email your contacts, leads, person accounts, and coworkers directly from Salesforce Classic.

Send Mass Email in Salesforce Classic

Send an email to a group of contacts, leads, person accounts, or coworkers all at the same time! Email a list of contacts, leads, or person accounts for small-scale sales or support. Mass email is intended to facilitate your business processes, not to replace your email application or handle mass-marketing campaigns.

Send Email in Salesforce Classic

Email your contacts, leads, person accounts, and coworkers directly from Salesforce Classic.

1. On the Activity History related list of a record, click **Send an Email**.
2. To change formatting type, click **Switch to Text-Only** or **Switch to HTML**.
3. To use a predefined email template, click **Select Template**.
4. Complete the fields.
5. Click **Send**.

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To send email:
- "Send Email"

SEE ALSO:

Considerations for Sending Email in Salesforce Classic

Guidelines for Sending Email in Salesforce Classic

Send Mass Email in Salesforce Classic

Send Mass Email in Salesforce Classic

Send an email to a group of contacts, leads, person accounts, or coworkers all at the same time! Email a list of contacts, leads, or person accounts for small-scale sales or support. Mass email is intended to facilitate your business processes, not to replace your email application or handle mass-marketing campaigns.

1. Depending on who the recipients of your mass email are, do one of the following.

   For contacts or person accounts
   On the Contacts or Cases tab, in the Tools section at the bottom of the page, click **Mass Email Contacts**. If your Salesforce org has person accounts, the link also appears on the Accounts tab.

   For leads
   On the Leads tab, in the Tools section at the bottom of the page, click **Mass Email Leads**.

   For coworkers (other Salesforce users)
   If you have the "Manage Users" permission, from Setup, enter `Mass Email Users` in the `Quick Find` box, then select **Mass Email Users**.

2. Select a list view of recipients, and then click **Go!**.
3. All recipients in the list view are selected by default. To remove recipients, deselect them.
4. Click **Next**.
5. Choose an email template.
6. To view the templates, click the **Preview** links.
7. Click **Next**.
8. On the confirmation page, select the processing options to use. The mass email name that you specify appears in the queue and status messages that you receive from Salesforce, not in the email that you're sending.
9. In Delivery Options, send the email, or choose a date and time zone for sending the email in the future.
10. Click **Send**, and then click **Finished**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To send mass emails to contacts, person accounts, or leads:
- "Mass Email"

To send mass emails to coworkers:
- "Mass Email"

  AND

  "Manage Users"

To send mass emails and log them in the Activity History related list:
- "Mass Email"

  AND

  "Edit Tasks"

SEE ALSO:

Considerations for Sending Mass Email

Guidelines for Sending Mass Email

View the Status of Your Mass Email

Considerations for Sending Email in Salesforce Classic

Before you send email, consider a few key points.

EDITIONS

Available in: Salesforce Classic

Available in all editions

General

- You can enter only one name in the `To` field.
- Spell Checker does not support all the languages that Salesforce supports. For example, Spell Checker doesn't support Thai, Russian, and double-byte languages, such as Japanese, Korean, or Chinese.

- You can include a signature in text emails only.

Email Templates

- When authoring an email, you can choose a predefined template for the message. To personalize your message, you can include merge fields that are replaced with information from the Salesforce record when the email is sent. For example, your company can use a standard template to communicate solution information to customers with cases. Your Salesforce admin can maintain company-wide templates, and you can maintain your own templates.
- Email templates give you access only to the fields that are accessible to you via your page layout and field-level security settings. (Field-level security is available in Enterprise, Unlimited, Performance, and Developer Editions.)
- If your template contains a merge field for which no data exists in a particular record, that field doesn't appear in the email that you send. To find such blank fields, modify your recipient list view to search for the merge fields that you're using in your template. Then enter the criterion "<field> equals," leaving the third field blank. Edit those records that have blank fields before you send email.
- If you modify an email template, your changes affect the HTML version of the template.
- You can't modify custom email templates.

Tracking Email

To track email that you sent, use HTML formatting when authoring, and make sure that your Salesforce admin has added the HTML Email Status related list to your contact, lead, and person account pages.

Guidelines for Sending Email in Salesforce Classic

Review additional information about sending email, including general functions, tracking email, and adding attachments.

EDITIONS

Available in: Salesforce Classic

Available in all editions

General

Who Can Send

Anyone with access to view or edit a record can send email related to the record.

Addresses

For contacts and leads that have multiple email fields, you can select an email address.

Use a semicolon, comma, space, or line to separate multiple email addresses in the `Additional To`, `CC`, and `BCC` fields.

If bounce management is activated and an email bounces, Salesforce displays an error message. To update the email address and send the email to the updated address, click the link in the error message.

Associating Records

When authoring an email, you can choose another record, such as an account, case, or custom object, to associate with the email.

Where Sent Email Appears

Emails that are sent via **Send an Email** appear in the Activity History list of the related records. The Activity History item is titled "Email: *`Subject`*." Click the email subject to view the body of the email.

Note: On lead records, if the sender leaves the `To` field blank, the email doesn't appear in the activity history.

For Salesforce orgs with Email-to-Case or On-Demand Email-to-Case enabled, emails that are sent from the Email related list of a case are saved in the Email related list.

Tracking

HTML Formatting

The HTML Email Status related list shows the date when an email was first opened, the number of times that it was opened, and the date when it was most recently opened.

The HTML Email Status related list includes automatic emails such as those sent through Web-to-Lead and Web-to-Case response rules.

Reporting

To report on the statistics in the HTML Email Status related list, use the HTML Email Status Report that's available from the Reports tab.

Attachments

File Size

You can attach multiple files to an email as long as the total size of all attached files doesn't exceed 10 MB.

If the combined file size of attachments to an email exceeds 3 MB, or if you use mass email, Salesforce sends multiple links. For example, if you send two attachments, each of which is 1.7 MB, the recipient receives two links.

Saving

To save an attachment that was sent with an email, associate the attachment with the email later, or send the email with the attachment to Salesforce via Email-to-Case, Email-to-Salesforce, On-Demand Email-to-Case, or Salesforce for Outlook.

Attachments that are sent as links are stored for 30 days.

SEE ALSO:

Send Email in Salesforce Classic

Send Mass Email in Salesforce Classic

Considerations for Sending Mass Email

EDITIONS

Available in: Salesforce Classic

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

Before you send mass email, consider a few key points.

- You can send a mass email to a recipient list that consists of contacts, leads, person accounts, or users that you can view in Salesforce.
- If a standard email field is hidden via field-level security, the Mass Email links for contacts and leads don't appear.
- Mass email can be sent to an address in a standard email field. Mass email with a custom email field isn't supported.
- Before you send a mass email, create a custom view of contacts, leads, person accounts, or cases without an email address. In the search criteria, choose "Email equals," and leave the third field blank. You can then update those records before sending your emails. You can't validate an email address without sending an email message.
- You can't send a mass email using a Visualforce email template.
- Attachments in mass emails are sent as links rather than as physical files. When recipients click the attachment link in the email, the attachment opens in a separate browser window, and they can download the file. Attachments are stored for 30 days.
- Note: The addressed and sent-to numbers in mass email status messages differ in the following situations.
  - 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.

Guidelines for Sending Mass Email

If you're sending mass email, refer to these guidelines for additional information.

EDITIONS

Available in: Salesforce Classic

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

- By default, the My Contacts, My Leads, Active Users, or My Cases views include all records with an email address. To change the list of recipients, create a custom view. If the record contains no email address, or `Email Opt Out` is selected, a contact, lead, or person account isn't included in any email list views. Person accounts are included in contact list views.
- In the email template preview window, the template displays any merge fields included in it, such as `{!Account.AccountNumber}`. When you send your email, data from the recipients' records, or any applicable substitute text, is inserted into the email in place of those merge fields.
- When `Store an activity for each message` is selected (default), the Activity History item is associated with the contact, lead, or person account and is displayed as "Mass Email:<Template Description>." The email subject, body, and attachments aren't stored in the Activity History item. Logging Activity History items requires access for viewing or editing the records in the recipient list and the "Edit Task" permission.
- If the email deliverability option `Notify sender when mass email completes` is selected, you receive an auto-generated status email from Salesforce for each mass email that you send. The subject line of the status email contains the value that you entered in the `Mass Email Name` field when sending the mass email.
- To view and cancel mass emails that you've scheduled, from your personal settings, enter *`Mass Emails`* in the `Quick Find` box, then select **Mass Emails** or **My Mass Emails**.

  To view and cancel mass emails that anyone in your company scheduled, if you have the "Manage Users" permission, from Setup, enter *`Mass Emails`* in the `Quick Find` box, then select **Mass Emails**.

SEE ALSO:

Send Mass Email in Salesforce Classic

View the Status of Your Mass Email

Stay in-the-know with an auto-generated status email for each mass email that you send.

EDITIONS

Available in: Salesforce Classic

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

1. Make sure that your Salesforce org is configured to receive email notifications for mass emails. See your Salesforce admin for help.
2. When creating the mass email, enter a value in the `Mass Email Name` field. This value appears in the subject line of the status email.
3. Send the mass email.

The status message that you receive shows the number of recipients that the mass email was addressed and sent to.

SEE ALSO:

Guidelines for Sending Mass Email

Experience Salesforce in Microsoft® Email Applications

Relate important Microsoft emails to Salesforce records, like contacts, leads, and opportunities. And see related Salesforce content directly in your Microsoft email applications.

Team up with your Salesforce administrator to choose between our cloud- and desktop-based Microsoft integration products.

IN THIS SECTION:

Cloud-Based Salesforce App for Outlook

Stay on top of important sales opportunities when you work in your Microsoft® email application. When using Outlook® Web App (OWA), Outlook 2016, or Outlook 2013 along with Microsoft Office 365™, manage your sales more efficiently. Relate email and attachments to Salesforce records—all without installing and maintaining software. And sync contacts and events between your email applications and Salesforce using Exchange Sync (Beta).

Desktop-Based Salesforce for Outlook

Sync contacts, events, and tasks between your desktop-based version of Outlook and Salesforce. Select an email in Outlook to see related Salesforce records, like leads, contacts, tasks, and opportunities. And relate that email to the Salesforce records of your choice.

Cloud-Based Salesforce App for Outlook

Stay on top of important sales opportunities when you work in your Microsoft® email application. When using Outlook® Web App (OWA), Outlook 2016, or Outlook 2013 along with Microsoft Office 365™, manage your sales more efficiently. Relate email and attachments to Salesforce records—all without installing and maintaining software. And sync contacts and events between your email applications and Salesforce using Exchange Sync (Beta).

Also, create Salesforce contacts, events, leads, opportunities, tasks, and cases—directly in your email application.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

IN THIS SECTION:

Salesforce App for Outlook

Stay on top of important sales opportunities when you work in your email application. When using Outlook® Web App (OWA), Outlook 2016, or Outlook 2013 along with Microsoft Office 365™, you can manage your sales more efficiently. Relate email and attachments to Salesforce records. And, create Salesforce records on the fly—directly in your email application.

Exchange Sync (Beta) Syncs Your Microsoft® Items from the Cloud

Keep your contacts and events in sync between your email system and Salesforce without installing and maintaining software.

Salesforce App for Outlook

Stay on top of important sales opportunities when you work in your email application. When using Outlook® Web App (OWA), Outlook 2016, or Outlook 2013 along with Microsoft Office 365™, you can manage your sales more efficiently. Relate email and attachments to Salesforce records. And, create Salesforce records on the fly—directly in your email application.

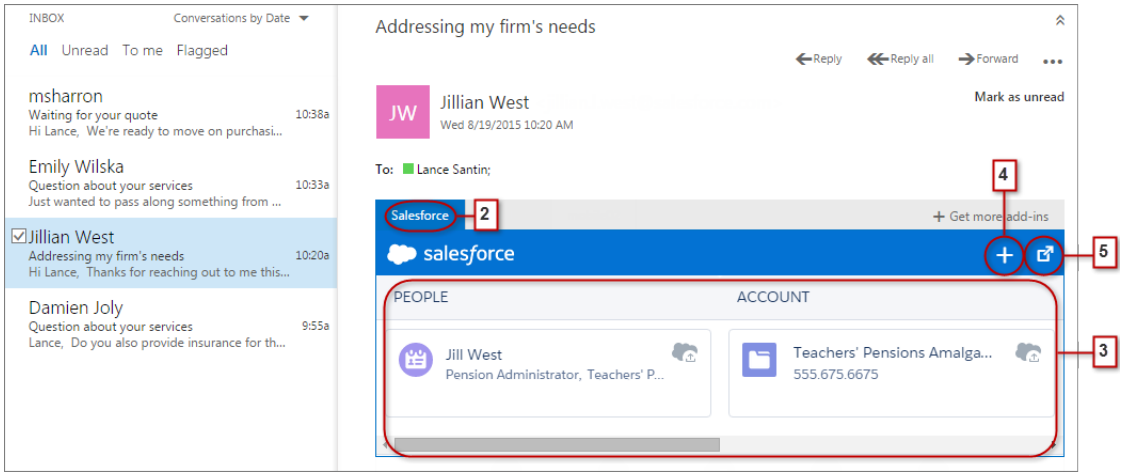
After your administrator enables Salesforce App for Outlook, you complete one-time procedures to get your Salesforce content to appear in your email application.

Then, when you select an email (1) and select `Salesforce` (2), you see relevant sales-related records (3). For the records that appear, you can add the email to multiple contacts—provided your administrator enabled Shared Activities enabled. Also add the email to one other record that accepts tasks, like an opportunity, a lead, or a case. You choose whether to include the email's attachments.

EDITIONS

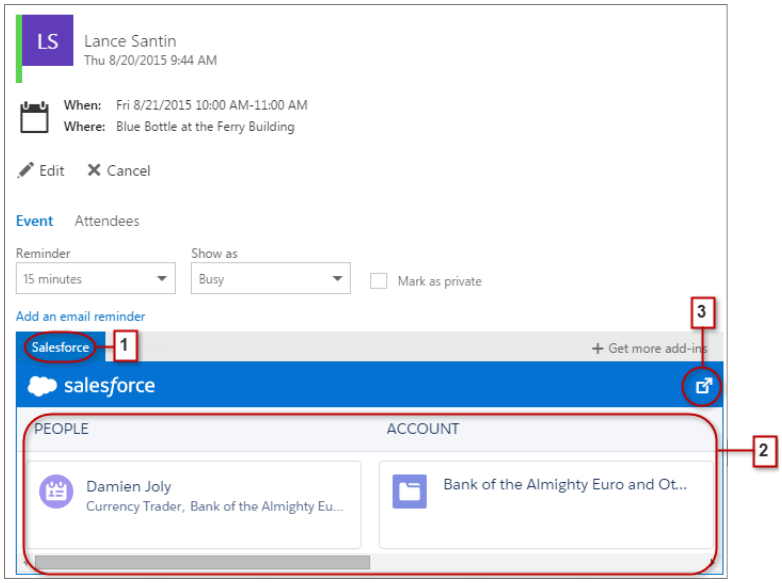
Available in: Salesforce Classic and Lightning Experience

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



Select the record to see more details about it in your email application. Or get complete details about the record or the email added to it directly in Salesforce (4).

As an attendee to events in Microsoft calendars, you see relevant Salesforce records. First, open an event in your Microsoft email application. Then, select Salesforce (1).



Relevant Salesforce records appear (2). And like when you work with emails, you can select a record to see more details in your email application. Or, you can get complete details about the record directly in Salesforce (3).

As an event organizer, you can see a different view of relevant Salesforce records. After you open an event you've organized, select **Add-ins** > **Salesforce**. Relevant records appear in the right pane.

IN THIS SECTION:

Salesforce App for Outlook System Requirements

Make sure that your system meets these requirements before you set up Salesforce App for Outlook.

Set Up Your Microsoft® Email Application to Experience Salesforce

Get your system ready to add email and attachments to Salesforce records from Outlook Web App (OWA), Outlook 2016, or Outlook 2013. Create Salesforce records on the fly—all while you're working in your Microsoft email application.

Experience Salesforce in Microsoft® Email Applications

Keep your sales opportunities on track when you access sales-related records directly from Microsoft® Outlook® Web App (OWA), Outlook 2016, and Outlook 2013, along with Office 365™.

SEE ALSO:

Salesforce App for Outlook System Requirements

Experience Salesforce in Microsoft® Email Applications

Salesforce App for Outlook System Requirements

Make sure that your system meets these requirements before you set up Salesforce App for Outlook.

For your	You need
Email server	Either: • Exchange 2016 or 2013 on-premise • Exchange online with Office 365
Email application	Either: • Outlook Web App • Microsoft Outlook® 2016 or 2013
Browser	To allow cookies from Salesforce using any of these browsers. • Microsoft Internet Explorer® 10 and 11 • Microsoft Edge, most recent stable version • Google Chrome™, most recent stable version • Mozilla® Firefox®, most recent stable version • Apple® Safari®, most recent stable version

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Set Up Your Microsoft® Email Application to Experience Salesforce

Get your system ready to add email and attachments to Salesforce records from Outlook Web App (OWA), Outlook 2016, or Outlook 2013. Create Salesforce records on the fly—all while you're working in your Microsoft email application.

IN THIS SECTION:

1. Get Access to Salesforce App for Outlook
   Take the initial step toward getting access to your sales-related Salesforce content directly in Microsoft® Outlook® Web App (OWA), Outlook 2016, and Outlook 2013.
2. Give Microsoft® Email Applications Access to Salesforce
   Get your systems ready to create Salesforce contacts, and view contacts, leads, and users. Even see related accounts, opportunities, and cases directly in Outlook Web App (OWA), Outlook 2016, and Outlook 2013.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

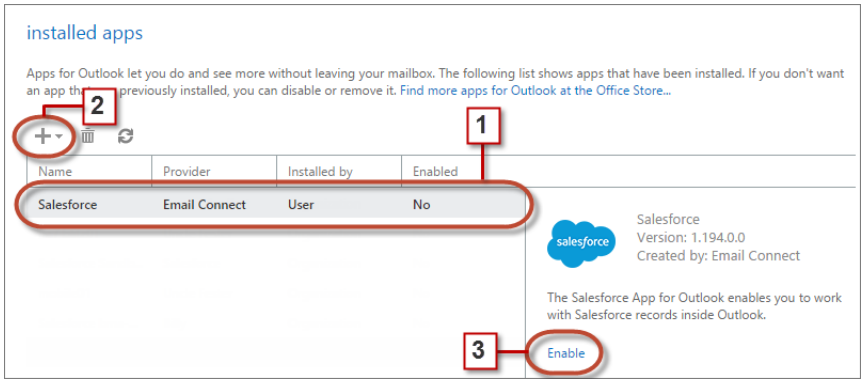
To set up Salesforce App for Outlook
- "Salesforce App for Outlook"

To authenticate the connection between Microsoft Exchange and Salesforce
- "View Setup and Configuration"

Get Access to Salesforce App for Outlook

Take the initial step toward getting access to your sales-related Salesforce content directly in Microsoft® Outlook® Web App (OWA), Outlook 2016, and Outlook 2013.

1. In Outlook Web App (OWA), Outlook 2016, or Outlook 2013, open Settings and then select **Manage apps**. From there, select **Salesforce**.



2. If the app isn't available, add it from the Office Store.
3. After the app appears, enable it.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up Salesforce App for Outlook
- "Salesforce App for Outlook"

To authenticate the connection between Microsoft Exchange and Salesforce
- "View Setup and Configuration"

Give Microsoft® Email Applications Access to Salesforce

Get your systems ready to create Salesforce contacts, and view contacts, leads, and users. Even see related accounts, opportunities, and cases directly in Outlook Web App (OWA), Outlook 2016, and Outlook 2013.

1. In OWA, Outlook 2016, or Outlook 2013, select an email in either the Inbox or Sent Items. Select **Salesforce**. You then see a prompt to log in to Salesforce.

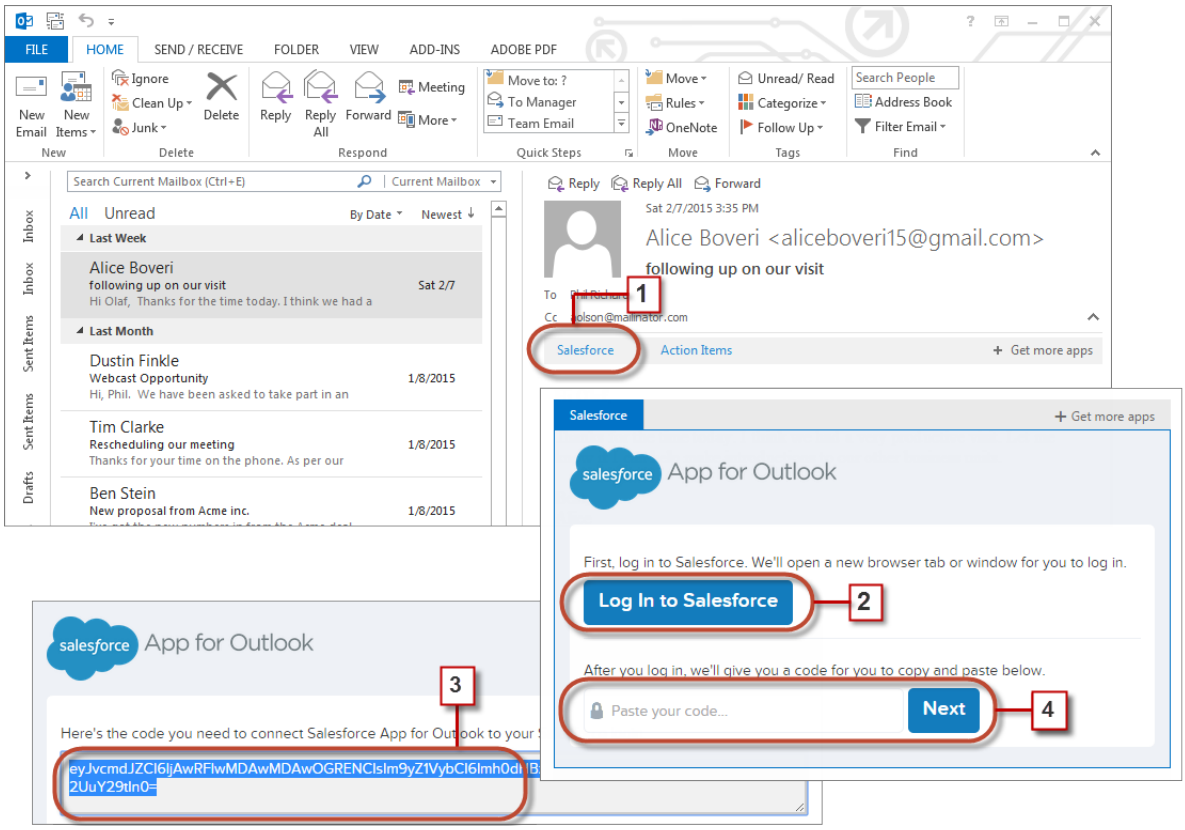
EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up Salesforce App for Outlook
- "Salesforce App for Outlook"



2. After you log in to Salesforce, you see a lengthy code.
3. Copy the code from Salesforce to your clipboard.
4. Paste the code, then click **Next**.

Tip: Make the log-in process easy for yourself. If your company uses My Domain or single sign-on (SSO) to validate your username and password, we recommend a way to log in to Salesforce. First, open a tab in your browser, and then, log in to Salesforce. Then, in another browser tab or your Outlook application, start using Salesforce App for Outlook.

Experience Salesforce in Microsoft® Email Applications

Keep your sales opportunities on track when you access sales-related records directly from Microsoft® Outlook® Web App (OWA), Outlook 2016, and Outlook 2013, along with Office 365™.

1. In Outlook Web App (OWA), Outlook 2016, or Outlook 2013, select an email in either your Inbox or Sent Items, or an event you're attending in your calendar.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

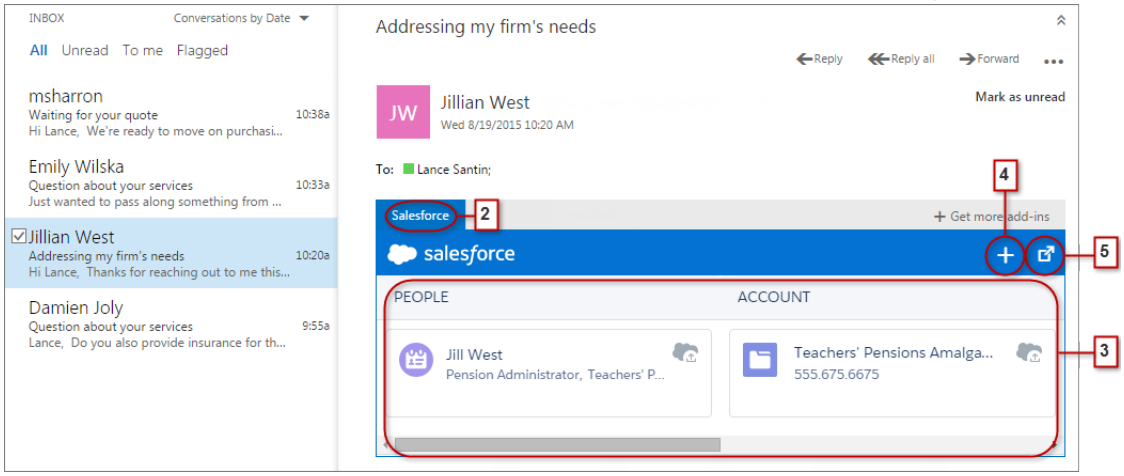
USER PERMISSIONS

To set up Salesforce App for Outlook

- "Salesforce App for Outlook"

To authenticate the connection between Microsoft Exchange and Salesforce

- "View Setup and Configuration"



2. Select `Salesforce`.
3. Scroll right to see a combination of up to 15 contacts, leads, person accounts, and users, as well as up to three related accounts, opportunities, and cases. And if you'd like, add the email and its attachments to multiple contacts—provided your administrator enabled Shared Activities enabled. You can also add the email and its attachments to one other record that accepts tasks, like an opportunity, a lead, or a case.
4. Create Salesforce files on the fly, like events, opportunities, and leads.

5. Select the record to see more details about it in your email application. Or get complete details about the record or the email added to it directly in Salesforce (4).

SEE ALSO:

Salesforce App for Outlook

Salesforce App for Outlook System Requirements

Exchange Sync (Beta) Syncs Your Microsoft® Items from the Cloud

Keep your contacts and events in sync between your email system and Salesforce without installing and maintaining software.

Note: Exchange Sync is currently available through a beta program, which means it's a high quality feature with known limitations.

If your administrator set up your organization to sync contacts and events between your company's email system and Salesforce, you're already on the path to increasing your productivity. That's because there's no need for you to duplicate your work between the two systems.

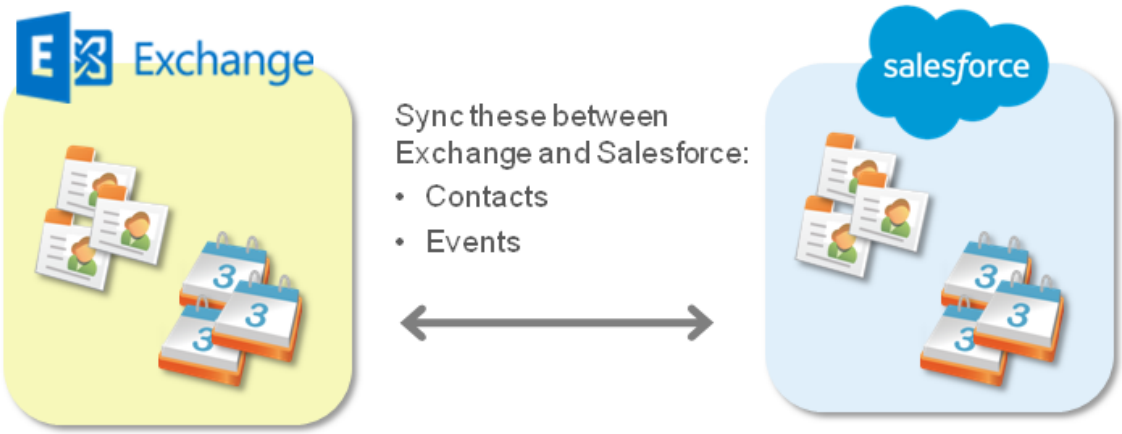
Depending on the settings your administrator selected, Salesforce for Exchange automatically syncs contacts and events between your company's email system and Salesforce in both directions, or one direction.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

You can sync contacts and events you create and maintain, either at your desk or on your mobile device.



At this time, Exchange Sync doesn't:

- Sync recurring events
- Sync invitees included in events
- Let you delete records from both systems in one action

However, you can manage these actions as you always have—by manually updating recurring events, adding event invitees, and deleting records in both systems.

IN THIS SECTION:

Get Ready to Sync Events

USER PERMISSIONS	
To sync events both ways:	"Read" and "Edit" on events, AND Event sync direction set to "Sync both ways" in Exchange configurations
To sync events from Salesforce to Exchange:	"Read" on events, AND Events sync direction set to "Salesforce to Exchange" in Exchange configurations
To sync events from Exchange to Salesforce:	"Create" on events, AND Event sync direction set to "Exchange to Salesforce" in Exchange configurations

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

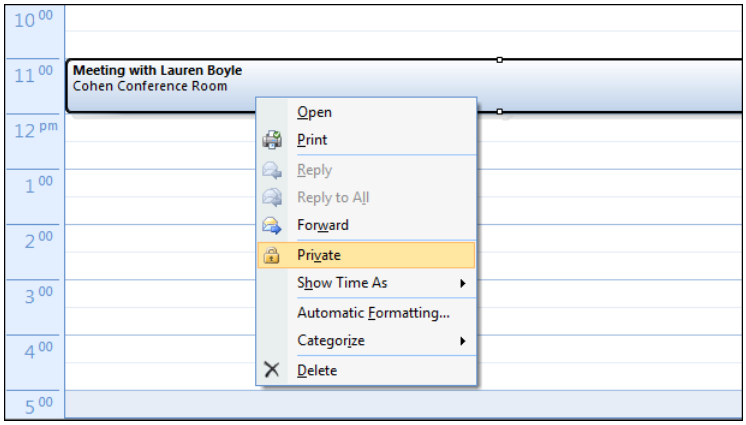
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

You can choose which events sync between your company's calendar application and Salesforce.

If your administrator has set up Salesforce to sync events, your events sync automatically between the calendar in your company's email system and Salesforce.

You can prevent personal events from syncing with Salesforce in different ways.

- Create a separate calendar in your calendar application to keep track of your personal events. (Exchange Sync is designed to sync only your main Exchange account calendar with Salesforce.)
- Ask your admin if your sync configuration is set up to sync private events. If you're not syncing private events, you can assign your personal events with the `Private` option in your calendar application, and those events won't sync with Salesforce.



It's best if you manage the events you don't want to sync before your administrator initiates sync for the first time. If your events begin syncing before you manage them, you can still remove them from Salesforce by deleting them manually.

Other events sync between Salesforce and your calendar every few minutes. If you're syncing a lot of events, your first sync might take some time.

Get Ready to Sync Contacts

USER PERMISSIONS	
To sync contacts both ways:	"Read" and "Edit" on contacts, and "Read" on accounts, AND Contact sync direction set to "Sync both ways" in Exchange configurations
To sync contacts from Salesforce to Exchange:	"Read" on contacts, AND Contact sync direction set to "Salesforce to Exchange" in Exchange configurations
To sync contacts from Exchange to Salesforce:	"Create" on contacts, AND Contact sync direction set to "Exchange to Salesforce"

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

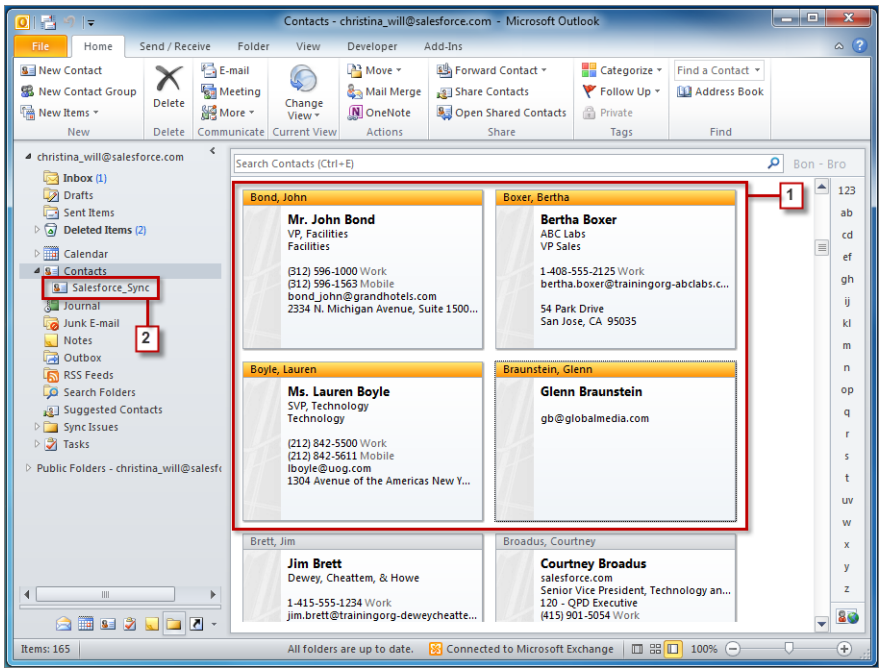
Learn how to sync contacts between your company email system and Salesforce. Depending on which direction you're syncing. , you'll move the email contacts you want to sync with Salesforce to a special folder in your email application.

After your administrator initiates contacts sync for you, Exchange Sync creates a folder in your email application called `Salesforce_Sync`. You can find the `Salesforce_Sync` folder under your contacts directory. Any contacts that have synced from Salesforce to your email system are in `Salesforce_Sync`. Don't rename, move, or delete the `Salesforce_Sync` folder, or syncing between Salesforce and your email system stops.

1. Ask your administrator which direction you're set up to sync.
   - If you're set up to sync from Salesforce to your email only, syncing is already in progress, and you don't need to do anything else. You're ready to access your Salesforce contacts directly from your email system!

- If you're set up to sync from your email to Salesforce or to sync both ways, you'll move the email contacts you want to sync to Salesforce now.

2. In your email application, select the contacts you want to sync. You can select multiple contacts at a time.



3. Move—do not copy—your selected contacts to the folder `Salesforce_Sync`. If you copy your contacts, you'll have duplicate ones, which is a hassle!

The contacts you move to the `Salesforce_Sync` folder begin to sync every few minutes. If you move a lot of contacts to `Salesforce_Sync`, your first sync might take some time.

Fix Sync Issues

If you have trouble syncing between Microsoft® Exchange and Salesforce, you can have your Salesforce administrator reset your sync process to clear out and then restore the connections between the records in your email and calendar application, and your records in Salesforce.

1. To reset sync for your contacts, make sure your `Salesforce_Sync` folder in your email application contains only the contacts you want to sync with Salesforce.
2. To reset sync for your events, make sure the events that you don't want to sync are assigned the `Private` option in your calendar application.
3. Ask your Salesforce administrator to reset your sync process.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Desktop-Based Salesforce for Outlook

Sync contacts, events, and tasks between your desktop-based version of Outlook and Salesforce. Select an email in Outlook to see related Salesforce records, like leads, contacts, tasks, and opportunities. And relate that email to the Salesforce records of your choice.

Salesforce for Outlook, a Microsoft® Outlook® integration application that you install, syncs contacts, events, and tasks between Outlook and Salesforce. In addition to syncing these items, you can add Outlook emails, attachments, events, and tasks to multiple Salesforce contacts, and view Salesforce records related to the contacts and leads in your emails and events—all directly in Outlook.

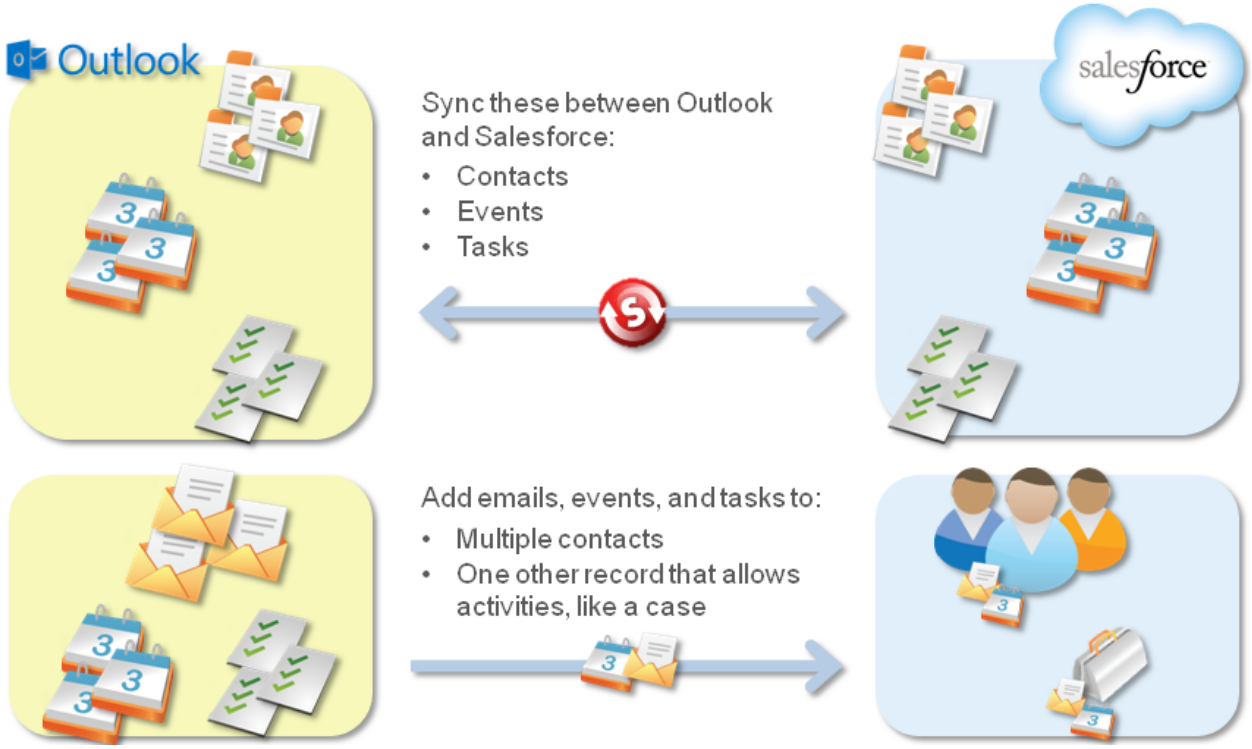
Depending on your organization, you may be able to customize what you sync and the sync directions between Outlook and Salesforce. Your administrator determines the level at which you can customize these settings in Salesforce.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

Here's a quick look at how Salesforce for Outlook helps you avoid duplicating your work and boost your productivity.



For a start-to-finish Salesforce for Outlook setup guide, see Getting Microsoft® Outlook® and Salesforce in Sync.

IN THIS SECTION:

Salesforce for Outlook Supported Languages

Download the Salesforce for Outlook Installer

You'll download the installer from Salesforce.

Install and Set Up Salesforce for Outlook

Manage Your Salesforce for Outlook Configuration

Depending on whether your administrator lets you change your settings, customize Salesforce for Outlook to fit your specific needs.

Access Salesforce for Outlook Settings and Tools

Syncing Between Microsoft® Outlook® and Salesforce Overview

Stop duplicating your contacts, events, and tasks in Outlook and Salesforce and start syncing between the two systems with Salesforce for Outlook.

My Unresolved Items

When you use Salesforce for Outlook, Exchange Sync, or Email to Salesforce to sync items or add emails from your email app to Salesforce, any items that these features can't automatically assign to Salesforce records appear in My Unresolved Items.

Delete Items Syncing with Salesforce for Outlook

Remove an item syncing with Salesforce for Outlook from both Salesforce and Outlook by deleting the item in one system only. Take care to give special treatment to recurring tasks and recently-updated items you want to delete.

View Salesforce Records in Microsoft® Outlook®

Get insight into Salesforce contacts and leads related to your important Outlook emails—directly in Outlook. The Salesforce Side Panel displays Salesforce records to which you can add Outlook emails, events, and tasks.

Create Cases from the Outlook Ribbon with Salesforce for Outlook

SEE ALSO:

Download the Salesforce for Outlook Installer

Install and Set Up Salesforce for Outlook

Syncing Between Microsoft® Outlook® and Salesforce Overview

Salesforce for Outlook Supported Languages

Salesforce for Outlook supports these languages.

- Chinese (Simplified)
- Chinese (Traditional)
- Czech
- Danish
- Dutch
- English
- German
- Finnish
- French
- Hebrew
- Hungarian
- Italian
- Japanese
- Korean
- Polish
- Portuguese (Brazil)
- Romanian

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

- Russian
- Spanish
- Spanish (Mexico)
- Swedish
- Thai
- Turkish
- Ukrainian
- Vietnamese

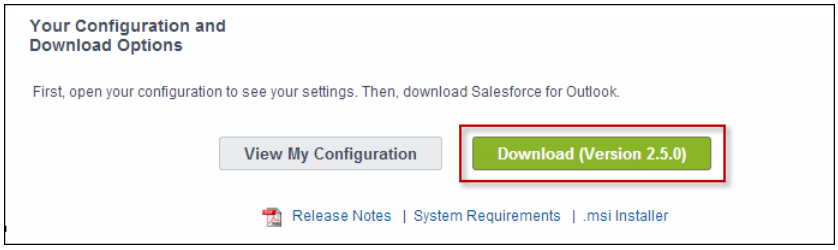
The Salesforce for Outlook installer doesn't support:

- Hebrew
- Portuguese (Brazil)
- Romanian
- Spanish (Mexico)
- Thai
- Vietnamese

Download the Salesforce for Outlook Installer

You'll download the installer from Salesforce.

1. Close Microsoft® Outlook®.
2. Close Salesforce for Outlook. To do so, right-click the Salesforce for Outlook icon ( ) in your system tray, and then click **Exit**
3. If you're upgrading from Salesforce for Outlook v2.4.2 or earlier, uninstall your current version from the Microsoft Windows® Control Panel. If you need help, contact your Windows administrator. If you're upgrading from Salesforce for Outlook v2.5.0. or later, continue to the next step.
4. From your personal settings, enter `Salesforce for Outlook` in the `Quick Find` box, then select **Salesforce for Outlook**.
5. Click **Download**. Then click **Save File**. If the **Download** button is unavailable, ask your administrator to assign you to an Outlook configuration.



EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To install Salesforce for Outlook:

- Assigned to an active configuration AND

  Valid data set for each object being synced

To change sync folders:

- Your Outlook profile set as the default in your Mail Settings AND

  Allow users to modify "Outlook folder for syncing contacts" in your Outlook configuration

If you're an administrator, you can deploy installations to multiple users simultaneously using the `.msi` version of the installer.

SEE ALSO:

Desktop-Based Salesforce for Outlook

Install and Set Up Salesforce for Outlook

Install and Set Up Salesforce for Outlook

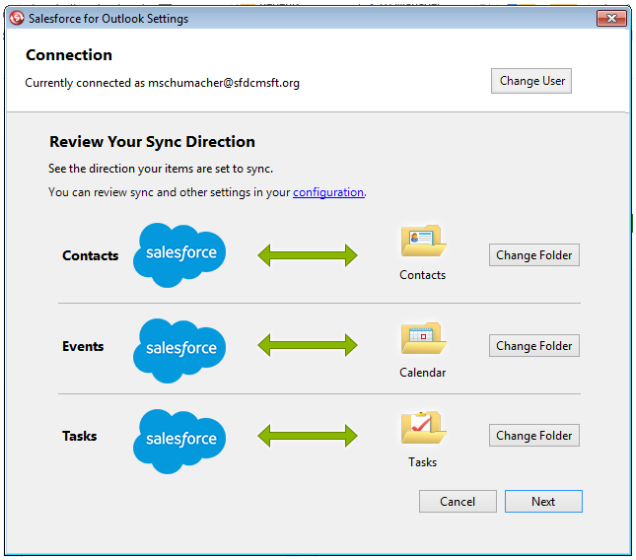
1. Open the installation file you downloaded and saved, and complete the installation wizard.

   Note: If you don't yet have .NET 4 installed, the installation wizard installs it for you. Keep in mind that the installation wizard prompts you to restart your machine after it installs .NET 4. You then need to run the installation wizard again to complete the installation process.

2. Open Microsoft® Outlook®. The setup wizard opens, and the Salesforce for Outlook icon ( ) appears in your system tray. If the wizard doesn't open, you can start it manually. Just right-click and click **Settings**.
3. If you need to log in to a Salesforce site other than the default, click **Change URL** and pick the server to which you want to connect. If the server you want isn't listed, select `Other...` and enter the URL, such as a custom domain used by your organization.
4. Enter your Salesforce username and password.
5. Click **Approve**. This creates a secure connection between Outlook and Salesforce. You won't need to log in again unless you encounter an error.

   Note: If your organization restricts IP addresses, logins from untrusted IPs are blocked until they're activated. Salesforce automatically sends you an activation email that you can use to log in. This lets you connect without IP restrictions from anywhere.

6. Click **Next**, and review the sync directions set up by your administrator. If you need to select different folders where your Outlook items will sync, click **Change Folder** and select ones that are within your default folders or the main Mailbox folder.



EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To install Salesforce for Outlook:

- Assigned to an active configuration AND

  Valid data set for each object being synced

To change sync folders:

- Your Outlook profile set as the default in your Mail Settings AND

  Allow users to modify "Outlook folder for syncing contacts" in your Outlook configuration

7. Click **Next**, and then select your sync method.
   - Choose to sync all of your contacts, events, and tasks. You'll mark items you don't want to sync with the "Don't Sync with Salesforce" category in Outlook.
   - Choose to sync individual contacts, events, and tasks. You'll mark items you want to sync with the "Sync with Salesforce" category in Outlook.
8. Click **Next**, and then select the kinds of private items you want to sync.
9. Click **Save**. A welcome message appears at the system tray icon ( ), which is now active. If you're configured to sync Outlook items, and you chose `Sync Only the Outlook Items I Select` for your sync method, all items in the folders you chose sync automatically. The icon spins during every sync cycle.

IN THIS SECTION:

Uninstalling Salesforce for Outlook

SEE ALSO:

Desktop-Based Salesforce for Outlook
Download the Salesforce for Outlook Installer
Uninstalling Salesforce for Outlook

Uninstalling Salesforce for Outlook

1. Close Outlook.
2. Right-click the sync icon ( ) and select **Exit**.
3. Using your Windows Add or Remove Programs tool, remove Salesforce for Outlook.

If you plan to reinstall Salesforce for Outlook, you'll have to first remove the old Salesforce for Outlook database files. Otherwise, Salesforce for Outlook will use your old sync settings. Default database file locations:

- (Microsoft Windows 7 and Vista) `C:\Users\`*`username`*`\AppData\Roaming\salesforce.com\Salesforce for Outlook\DB\`
- (Microsoft Windows XP) `C:\Documents and Settings\`*`username`*`\Application Data\salesforce.com\Salesforce for Outlook\DB\`

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

Manage Your Salesforce for Outlook Configuration

Depending on whether your administrator lets you change your settings, customize Salesforce for Outlook to fit your specific needs.

1. From your personal settings in Salesforce, search for Salesforce for Outlook. Then click **View My Configuration**.
2. Depending on your permissions, you can:
   - Edit your email settings
   - Edit your sync settings
   - Edit your sync direction
   - Edit your conflict settings
   - View your matching criteria
   - Edit your field mappings
3. Save your changes. All changes take effect the next time your data syncs. Return to your original settings any time by clicking **Revert to default** at the top of your modified configuration. Your administrator can change your settings as needed.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To access your Salesforce for Outlook configuration

- Assigned to an active configuration

IN THIS SECTION:

Edit Your Salesforce for Outlook Email Settings

See whether your administrator lets you add emails to Salesforce from Microsoft® Outlook®, and change your email settings based on your needs.

Edit Your Salesforce for Outlook Sync Settings

Depending on whether your administrator gave you permissions, customize which items sync between Microsoft Outlook and Salesforce, and the directions they sync.

Customize Your Salesforce for Outlook Sync Direction

Depending on whether your administrator gave you permission, customize sync directions between Microsoft® Outlook® and Salesforce based on your preferences.

Edit Conflict Settings

Specify what happens when Salesforce for Outlook encounters a conflict as it syncs records between Microsoft® Outlook® and Salesforce.

Viewing Your Salesforce for Outlook Matching Criteria

See the matching criteria your administrator assigned to you.

Specify Which Salesforce Fields Sync to Microsoft® Outlook®

Depending on your Salesforce for Outlook permissions, map fields from the Salesforce records you sync to Outlook.

Edit Your Salesforce for Outlook Email Settings

See whether your administrator lets you add emails to Salesforce from Microsoft® Outlook®, and change your email settings based on your needs.

1. From your personal settings in Salesforce, search for Salesforce for Outlook. Then click **View My Configuration**.

   If **Add Email** is selected, the **Add Email** and **Send and Add** options appear in Outlook.

   Note: If you don't see the **Add Email** and **Send and Add** options, ask your administrator to activate Email to Salesforce.

2. Click **Email to Salesforce Settings**.
3. Enter the email addresses that you'll use to send email in `My Acceptable Email Addresses`. Separate multiple email addresses with commas.
4. Choose whether all emails are sent to My Unresolved Items (so that you can manually assign them to related records) or to have Salesforce try to assign them first.
5. Configure Email to Salesforce to add emails as activities to matching opportunities, leads, contacts, or all three. If you configure Email to Salesforce to associate emails to matching leads or contacts, Salesforce searches the **To** and **CC** fields for the email addresses of your leads or contacts. If any leads or contacts are found, Salesforce saves the email to the Activity History related list on the appropriate record.
6. If you selected leads or contacts:
   - Specify how Email to Salesforce processes emails that contain lead or contact information that matches duplicate records.
   - Select `If no matching records are found, create a task and send it to My Unresolved Items` to have email sent to My Unresolved Items if no matching records are found. If this checkbox isn't selected, and Salesforce can't identify the email addresses in the `To` or `From` fields, the email isn't saved in Salesforce.
7. Select `Always save email attachments` to save attachments on emails sent to Salesforce.
8. To receive a confirmation email when an email is sent to Salesforce, select `Email me confirmation of association`.
9. Click **Save**.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To access your Salesforce for Outlook configuration:
- Assigned to an active configuration

To edit email settings:
- "Add Email"

SEE ALSO:

Manage Your Salesforce for Outlook Configuration

Add Microsoft® Outlook® Emails to Salesforce Records

Desktop-Based Salesforce for Outlook

Edit Your Salesforce for Outlook Sync Settings

Depending on whether your administrator gave you permissions, customize which items sync between Microsoft Outlook and Salesforce, and the directions they sync.

1. From your personal settings in Salesforce, search for Salesforce for Outlook. Then click **View My Configuration**.
2. To see which kinds of records sync, hover over filter icons ( ).
3. To stop an item from syncing, clear its checkbox. All fields related to that item are disabled on the page.
4. Save your changes. All changes take effect the next time your data syncs. Return to your original settings any time by clicking **Revert to default** at the top of your modified configuration. Your administrator can change your settings as needed.

SEE ALSO:

Manage Your Salesforce for Outlook Configuration

Syncing Between Microsoft® Outlook® and Salesforce Overview

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To access your Salesforce for Outlook configuration

- Assigned to an active configuration

To disable sync:

- "Whether object is synced"

Customize Your Salesforce for Outlook Sync Direction

Depending on whether your administrator gave you permission, customize sync directions between Microsoft® Outlook® and Salesforce based on your preferences.

1. From your personal settings in Salesforce, search for Salesforce for Outlook. Then click **View My Configuration**.
2. Select one of these options under Sync Direction for a particular object.
   - `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.
   - `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`.
   - `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. Save your changes. All changes take effect the next time your data syncs. Return to your original settings any time by clicking **Revert to default** at the top of your modified configuration. Your administrator can change your settings as needed.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To access your Salesforce for Outlook configuration

- Assigned to an active configuration

To change sync direction

- "Sync direction"

SEE ALSO:

Manage Your Salesforce for Outlook Configuration

Edit Conflict Settings

Specify what happens when Salesforce for Outlook encounters a conflict as it syncs records between Microsoft® Outlook® and Salesforce.

1. From your personal settings in Salesforce, search for Salesforce for Outlook. Then click **View My Configuration**.
2. Under Conflict Behavior for each object you're syncing, select one of these options.
   - `Salesforce always wins`
   - `Outlook always wins`
3. Save your changes. All changes take effect the next time your data syncs. Return to your original settings any time by clicking **Revert to default** at the top of your modified configuration. Your administrator can change your settings as needed.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To access your Salesforce for Outlook configuration
- Assigned to an active configuration

To change conflict behavior
- "Conflict behavior"

Viewing Your Salesforce for Outlook Matching Criteria

See the matching criteria your administrator assigned to you.

If you have multiple Salesforce contacts that match a contact in Outlook, Salesforce for Outlook needs a way to determine which contact to sync. Your administrator sets criteria for the way Salesforce for Outlook chooses the correct contact.

Review the matching preference assigned to you. Available options include:

- `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.

SEE ALSO:

Manage Your Salesforce for Outlook Configuration

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To access your Salesforce for Outlook configuration
- Assigned to an active configuration

To view your configuration
- Assigned to a configuration

Specify Which Salesforce Fields Sync to Microsoft® Outlook®

Depending on your Salesforce for Outlook permissions, map fields from the Salesforce records you sync to Outlook.

Field mappings define which Salesforce and Outlook fields correspond when items sync between the two systems.

1. From your personal settings in Salesforce, search for Salesforce for Outlook. Then click **View My Configuration**.
2. Under Data Settings, click **Edit Field Mappings** under `Contacts`, `Events`, or `Tasks` to display all the fields for records on that object.
3. Review which Salesforce fields are mapping to each Outlook field.
4. 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.

   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.

5. Click **Save**. Field mappings begin syncing on items the next time those items are updated in either Salesforce or Outlook. Return to your original settings any time by clicking **Revert to default** at the top of your modified configuration. Your administrator can change your settings as needed.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To access your Salesforce for Outlook configuration
- Assigned to an active configuration

To change field mappings
- Let users modify "Field mappings" in configuration

SEE ALSO:

Manage Your Salesforce for Outlook Configuration

Access Salesforce for Outlook Settings and Tools

After you install Salesforce for Outlook, an icon ( ) appears in your Microsoft® Windows system tray.

From the system tray icon, you can:

- Sync Outlook and Salesforce items
- View your sync log
- Resolve your unresolved synced items
- Manage your Salesforce for Outlook configuration
- Manage which Outlook items sync with Salesforce on page 429
- Change your login information
- Hide alerts

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

- View errors
- Change your sync folders
- Access the Salesforce for Outlook online help

Accessing the System Tray Application

- If you don't see the icon, just restart the application by double-clicking the Salesforce for Outlook shortcut on your desktop or the application in your computer's Programs directory (**Start** > **All Programs** > **salesforce.com** > **Salesforce for Outlook**).
- If the icon is disabled ( ), you may need to start Outlook.
- If you don't see the icon, you might need to click the arrow next to the system tray and drag the Salesforce for Outlook icon to the system tray.

IN THIS SECTION:

Viewing the Salesforce for Outlook Sync Log

Changing Your Salesforce for Outlook Login Information

Change Your Salesforce for Outlook Sync Folders

If you want to sync contacts, events, and tasks between Microsoft® Outlook® and Salesforce, you can set up Salesforce for Outlook to sync items in the Outlook folders of your choice.

Hide Salesforce for Outlook Alerts

If you'd rather not see system tray alerts for sync and other errors, you can hide them.

View Salesforce for Outlook Errors

Viewing the Salesforce for Outlook Sync Log

The sync log records troubleshooting information for Salesforce for Outlook, including the number of records that had errors and the number of records that were created, updated, or deleted during sync.

To view this log, right-click the system tray icon ( ) and click **Sync** > **View Sync Log**.

SEE ALSO:

Access Salesforce for Outlook Settings and Tools

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

Changing Your Salesforce for Outlook Login Information

If your Salesforce username or password changes, you'll need to update your login information in Salesforce for Outlook.

1. Right-click the system tray icon ( ) on your desktop and select **Settings...**
2. Click **Change User**.
3. Enter your correct Salesforce username and password, and click **Login**. This creates a secure connection between Outlook and Salesforce. You won't need to log in again unless you encounter an error.
4. Click **Next**, and then click **Done**.

Note: If your organization restricts IP addresses, logins from untrusted IPs are blocked until they're activated. Salesforce automatically sends you an activation email that you can use to log in. The email contains a security token that you must add to the end of your password. For example, if your password is `mypassword`, and your security token is `XXXXXXXXXX`, you must enter `mypasswordXXXXXXXXXX` to log in.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To log in to Salesforce for Outlook

- Assigned to an active configuration

SEE ALSO:

Access Salesforce for Outlook Settings and Tools

Change Your Salesforce for Outlook Sync Folders

If you want to sync contacts, events, and tasks between Microsoft® Outlook® and Salesforce, you can set up Salesforce for Outlook to sync items in the Outlook folders of your choice.

1. Right-click the system tray icon ( ) on your desktop and select **Settings...**.
2. Click **Change Folder** and select or create a folder that's within your default folders or the main Mailbox folder.
3. Click **Save**.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To change sync folders:

- Assigned to an active configuration

  AND

  Your Outlook profile set as the default in your Mail Settings

SEE ALSO:

Access Salesforce for Outlook Settings and Tools

Hide Salesforce for Outlook Alerts

If you'd rather not see system tray alerts for sync and other errors, you can hide them.

Right-click the system tray icon ( ) and click **Hide Alerts**.

SEE ALSO:

Access Salesforce for Outlook Settings and Tools

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

View Salesforce for Outlook Errors

Whenever Salesforce for Outlook has problems syncing your data, the system tray icon changes to an error icon ( ), and the status text at the top of the system tray shortcut menu displays the number of errors.

To view these errors, double-click the system tray icon or click the text in the shortcut menu to open the Salesforce for Outlook Error dialog box. If an error relates to a specific Outlook record, you can click the record's link to edit that record in Outlook.

To refresh the list after you resolve errors, click **Try Again**. Salesforce for Outlook syncs your data and removes any errors that have been resolved.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

SEE ALSO:

Access Salesforce for Outlook Settings and Tools

Syncing Between Microsoft® Outlook® and Salesforce Overview

Stop duplicating your contacts, events, and tasks in Outlook and Salesforce and start syncing between the two systems with Salesforce for Outlook.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

User permissions needed to sync	When you sync	You'll Need
Contacts	From Salesforce to Outlook	"Read" on contacts; Contacts sync direction set to `Salesforce to Outlook`
	Both ways	"Read" and "Edit" on contacts, and "Read" on accounts; Contacts sync direction set to `Sync both ways`
Events and tasks	From Outlook to Salesforce:	"Read" and "Edit" on events; Events and Tasks sync direction set to `Outlook to Salesforce`
	From Salesforce to Outlook	"Read" and "Edit" on events; Events and Tasks sync direction set to `Salesforce to Outlook`
	Both ways	"Read" and Edit" on events; Events and Tasks sync direction set to `Sync both ways`
	Multiday events	"Enable Multiday Events" on activities

User permissions needed to sync	When you sync	You'll Need
	Recurring Salesforce tasks to Outlook	"Sync recurring Salesforce tasks to Outlook"

Before you download and install Salesforce for Outlook, make sure your Outlook folders include the items you want to sync. If you're syncing from Outlook to Salesforce, moving a record out of a synced Outlook folder deletes that record in Salesforce. If you're syncing from Salesforce to Outlook, removing a record from Salesforce deletes that record in Outlook.

Learning about Sync Schedules

Salesforce for Outlook syncs your items based on your system activity. Events and tasks sync automatically every ten minutes; contacts sync automatically every hour. If, however, Salesforce for Outlook detects keyboard or mouse inactivity for 30 minutes, the sync frequency for events and tasks changes to 30 minutes. After two hours of inactivity, the frequency for all updates changes to hourly, and after four hours, the frequency changes to every four hours.

You can, of course, sync manually whenever you'd like. Just right-click the system tray icon ( ), and then click **Sync** > **Sync Now**.

Excluding Certain Records from Syncing

If you chose the Automatic option for your sync method, you have a couple of options for excluding certain items from syncing with Salesforce for Outlook.

- You can choose to sync items you mark as Private in Microsoft® Outlook®. If you don't want to sync private items, open Salesforce for Outlook Settings, and deselect the types of private items you don't want to sync.

  If you have synced items in Outlook that you later mark as Private, those items remain in Salesforce. The corresponding Salesforce items, however, will no longer receive updates if you modify the ones in Outlook.

- If you don't want certain Outlook items to sync, regardless of whether they're marked as Private, assign them to the category *Don't Sync with Salesforce* in Outlook. For details on using categories in Outlook, refer to your Outlook documentation.

IN THIS SECTION:

Prevent Which Microsoft® Outlook® Items Sync with Salesforce

If you're set up to sync your Outlook contacts, events, and tasks to Salesforce using the `Sync All Outlook Items` option in Salesforce for Outlook, you can still control which items you don't want to sync.

SEE ALSO:

Syncing Contacts with Salesforce for Outlook

Syncing Events with Salesforce for Outlook

Syncing Tasks with Salesforce for Outlook

My Unresolved Items

Syncing Contacts with Salesforce for Outlook

You can keep your important Outlook and Salesforce contacts in sync using Salesforce for Outlook. When contacts initially sync, Salesforce for Outlook checks to see whether a contact with the same email address exists in both Outlook and Salesforce. If a matching email address exists, the two contacts are synced. If it doesn't exist, Salesforce for Outlook checks to see whether a contact with the same first name, last name, and company name exists. If it doesn't exist, a new contact is created and the two are synced.

Your Outlook configuration defines which items are set to sync, which direction the data flows between Outlook and Salesforce, and what happens when data conflicts. You can set up Salesforce for Outlook to sync in the following ways, depending on whether your administrator allows you to change sync directions.

- *`Salesforce to Outlook`*
- *`Sync both ways`*

Salesforce for Outlook lets you sync up to 5,000 contacts, and isn't case-sensitive when matching contacts.

Syncing Contacts from Salesforce to Outlook

If	Then
A contact already exists in Outlook	The Salesforce contact replaces the Outlook contact and the two are synced.
A contact doesn't yet exist in Outlook	Salesforce for Outlook syncs the Salesforce contact, which creates the contact in Outlook.
You delete a contact in Outlook	Salesforce for Outlook won't sync the Salesforce contact again.
Multiple matching contacts exist in Outlook	Salesforce for Outlook selects one of them and syncs it.
You update a contact in Salesforce	The Salesforce contact overwrites the Outlook contact.
You update a contact in Outlook	The updates remain in the Outlook contact, but won't sync to Salesforce. The next time updates are made to the Salesforce counterpart, the

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To sync contacts from Salesforce to Outlook:

- "Read" on contacts

  AND

  Contact sync direction set to *`Salesforce to Outlook`*

To sync contacts both ways:

- "Read" and "Edit" on contacts, and "Read" on accounts

  AND

  Contact sync direction set to *`Sync both ways`*

If	Then
	Salesforce counterpart overwrites the Outlook contact.
You delete a Salesforce contact	The Outlook counterpart is also deleted. If the Outlook contact is deleted and the Salesforce contact is updated, the contact is recreated in Outlook.

Syncing Contacts Both Ways Between Salesforce and Outlook

If	Then
A contact exists on one side only	The contact is automatically created on the other side and the two are synced.
A matching contact exists	One contact record replaces the other one, and the records are synced. If your Outlook configuration specifies that Outlook contacts win, the Outlook version replaces the Salesforce version, and vice versa if Salesforce is set to win. Any change to either record is automatically reflected in the other. If records conflict, the conflict behavior setting determines which record wins.
Multiple matching Salesforce contacts exist	As long as there's only one version of the Outlook contact and that contact has an email address, we sync the Outlook contact with aSalesforce contact based on your matching preference, such as the contact that was most recently updated.
You update a contact	Both contacts are updated with the latest changes. If records conflict, the conflict behavior setting determines which record wins.
You delete a Salesforce contact and update an Outlook contact	The Outlook counterpart is deleted if Salesforce is set to win, and the contact is recreated in Salesforce if Outlook is set to win.
You delete an Outlook contact and update a Salesforce contact	The Salesforce counterpart is deleted if Outlook is set to win, and the contact is recreated in Outlook if Salesforce is set to win.

Excluding Certain Records from Syncing

If you chose the Automatic option for your sync method, you have a couple of options for excluding certain items from syncing with Salesforce for Outlook.

- You can choose to sync items you mark as Private in Microsoft® Outlook®. If you don't want to sync private items, open Salesforce for Outlook Settings, and deselect the types of private items you don't want to sync.

  If you have synced items in Outlook that you later mark as Private, those items remain in Salesforce. The corresponding Salesforce items, however, will no longer receive updates if you modify the ones in Outlook.

- If you don't want certain Outlook items to sync, regardless of whether they're marked as Private, assign them to the category *Don't Sync with Salesforce* in Outlook. For details on using categories in Outlook, refer to your Outlook documentation.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce Overview

Resolving Your Synced Contacts

Syncing Events with Salesforce for Outlook

You can keep your Outlook and Salesforce events in sync using Salesforce for Outlook. After an event is in Salesforce, you can assign it to related records, like contacts, accounts, opportunities, and so on. Syncing events also lets you maintain an accurate view of your availability when you create events and request meetings from your Salesforce calendar.

Which Events Sync

Your Outlook configuration defines which items are set to sync, which direction the data flows between Outlook and Salesforce, and what happens when data conflicts. The event filters in your configuration determine which events sync. The possible filters are:

- `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`.

Event updates stop syncing once the event falls outside of the range you're configured to sync.

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. Recurring event patterns must match exactly. 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.

How We Match Events

When events first sync, we either link them with existing events that have the same subject and time or create new events if nothing matches.

How You Assign Events to Salesforce records

After an event is added to Salesforce, you can assign it to other records using the My Unresolved Items page or the `Related To` and `Name` fields on the event record. The event is added to the associated record's Activity History or Open Activities related list. You can't save changes if your events have a required custom field or an activity custom field becomes required after items are added to your unresolved events list.

Who Sees Synced Events in Salesforce

Events that aren't marked as private are visible Salesforce to you, those above you in your role hierarchy, and anyone who has access to the records they're associated with. You can also grant access to view your calendar to other users, personal and public groups, roles, or roles and subordinates.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To sync events from Outlook to Salesforce

- "Read" and "Edit" on events, and event sync direction set to `Outlook to Salesforce`

To sync events from Salesforce to Outlook:

- "Read" and "Edit" on events, and event sync direction set to `Salesforce to Outlook`

To sync events both ways:

- "Read" and Edit" on events, and event sync direction set to `Sync both ways`

To sync multiday events:

- "Enable Multiday Events" on activities

Excluding Certain Records from Syncing

If you chose the Automatic option for your sync method, you have a couple of options for excluding certain items from syncing with Salesforce for Outlook.

- You can choose to sync items you mark as Private in Microsoft® Outlook®. If you don't want to sync private items, open Salesforce for Outlook Settings, and deselect the types of private items you don't want to sync.

  If you have synced items in Outlook that you later mark as Private, those items remain in Salesforce. The corresponding Salesforce items, however, will no longer receive updates if you modify the ones in Outlook.

- If you don't want certain Outlook items to sync, regardless of whether they're marked as Private, assign them to the category *Don't Sync with Salesforce* in Outlook. For details on using categories in Outlook, refer to your Outlook documentation.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce Overview

Resolving Your Synced Events

Syncing Recurring Events with Salesforce for Outlook Overview

Syncing Recurring Events with Salesforce for Outlook Overview

If your organization is set up to sync recurring events, you can keep them synced between Outlook and Salesforce using Salesforce for Outlook. You can sync recurrences with the following patterns.

- Daily
- Weekly
- Monthly
- Yearly

After you sync recurring events to Salesforce, you can assign the recurrences to related records, such as contacts, accounts, opportunities, and so on. Syncing recurring events also helps you maintain an accurate view of your availability when you create events and request meetings from your Salesforce calendar.

Recurring events do not appear on the My Unresolved Items page. Instead, you can go directly to the recurring events in your calendar to associate the recurring events with Salesforce records.

EDITIONS

Available for set up from: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To sync recurring events between Outlook and Salesforce:

- "Recurring Events"

  In addition, "Read" and "Edit" on events, and event sync direction set to any of the following directions.

  `Outlook to Salesforce`,

  `Salesforce to Outlook`, or

  `Sync both ways`

Understanding Differences Between Outlook and Salesforce

Recurring events work differently between Outlook and Salesforce.

For	You should know that
Ranges of occurrences	If your recurrences include more than 100 occurrences, Salesforce for Outlook creates the series with 100 occurrences in Salesforce. After the dates of occurrences pass, Salesforce for Outlook then automatically adds another group of occurrences, bringing the total future occurrences up to 100 again. The schedule on which Salesforce adds these groups depends on the number of occurrences that passed and when you last synced, as well as whether you changed any existing occurrences.
Monthly occurrences	Salesforce for Outlook doesn't support the Outlook recurrence pattern option **weekend day**.
Yearly occurrences	Salesforce for Outlook lets you set up events that recur every year. If you enter a number other than `1` for the **Recur every** option in Outlook

For	You should know that
	recurrence patterns, Salesforce for Outlook won't sync the recurring series. This mean that you can set up yearly recurrences, but not recurrences for every other year or every three years. In addition, Salesforce for Outlook doesn't support the Outlook recurrence pattern option **weekend day**.
Events lasting longer than 24 hours	Salesforce doesn't support recurring events lasting longer than 24 hours.

Modifying Recurring Series

You can modify recurring series, but it's good to know what to avoid, so that you won't lose any details for occurrences that you've individually modified.

If you modify	You should know that
Recurring series in Outlook	Those changes won't propagate to individually modified occurrences in Salesforce. For example, you modify the appointment time of an occurrence, and then later modify the appointment time for the entire series. The appointment time modification for the series won't propagate to the one modified occurrence. Critical changes include modifications to: • Appointment times • Recurrence patterns • Ranges of occurrences If you make critical changes to recurring series, individually modified occurrences lose their modifications.
Start dates for recurring series in Outlook	Salesforce doesn't support modifications to start dates that already occurred.
End dates for recurring series in Salesforce	This is a critical change in Outlook, and will clear any modifications you make to individual occurrences within the series. Those modifications won't propagate to Outlook. You can, however, modify end dates in Outlook, but that type of critical change will clear all modifications you've made to individual occurrences—in both Outlook and Salesforce.
Individual occurrences	• You may lose those changes if you make critical changes to the recurring series. • If you delete an occurrence, and then move the following occurrence into its place, Salesforce for Outlook doesn't update Salesforce correctly. Instead, the occurrence you deleted in Outlook remains in Salesforce along with the occurrence you moved into its place. For example, you change your recurring event in Outlook. You delete the October 4th occurrence, and move the October 5th occurrence into its place. In Salesforce, you'll see two occurrences on October 4th: the one you deleted, and the one you moved into its place. For October 5th, you'll have no occurrences.

If you modify	You should know that
	• Outlook modifications propagate to occurrences in Salesforce, regardless of whether the ones in Salesforce include critical modifications. Deleted occurrences in Salesforce, however, remain deleted, and aren't replaced with individually modified occurrences from Outlook.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce Overview

Resolving Your Synced Events

Syncing Events with Salesforce for Outlook

Syncing Tasks with Salesforce for Outlook

Keep Microsoft® Outlook® and Salesforce tasks in sync.

After a task is in Salesforce, you can assign it to related records, like contacts, accounts, and opportunities.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To sync tasks from Outlook to Salesforce:

- "Read" and "Edit" on tasks, and task sync direction set to `Outlook to Salesforce`

To sync tasks from Salesforce to Outlook:

- "Read" and "Edit" on tasks, and task sync direction set to `Salesforce to Outlook`

To sync tasks both ways:

- "Read" and Edit" on tasks, and task sync direction set to `Sync both ways`

Which Tasks Sync

Your Outlook configuration defines which items are set to sync, which direction the data flows between Outlook and Salesforce, and what happens when data conflicts. The task filters in your configuration determine which tasks sync. The possible filters are:

- `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`.

Salesforce for Outlook doesn't sync every kind of task. These kinds of tasks sync until they fall outside of the date range set in your task filter:

- Recurring Salesforce tasks to Outlook
- Completed tasks, if marked as completed after Salesforce for Outlook syncs
- Deferred tasks
- In progress tasks
- Not started tasks
- Repeating tasks, which you create in Salesforce
- Tasks flagged for follow-up
- Waiting on someone else tasks

Which Tasks Don't 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

How We Match Tasks

When tasks first sync, we link them with existing tasks that have the same subject and due date. If you don't assign due dates to tasks, we link them using the same subject only.

How You Assign Tasks to Salesforce Records

After a task is added to Salesforce, you can assign it to other records using the My Unresolved Items page or the `Related To` and `Name` fields on the task record. The task is added to the associated record's Activity History or Open Activities related list. You can't save changes if your tasks have a required custom field or an activity custom field becomes required after items are added to your unresolved tasks list.

Excluding Certain Records from Syncing

If you chose the Automatic option for your sync method, you have a couple of options for excluding certain items from syncing with Salesforce for Outlook.

- You can choose to sync items you mark as Private in Microsoft® Outlook®. If you don't want to sync private items, open Salesforce for Outlook Settings, and deselect the types of private items you don't want to sync.

  If you have synced items in Outlook that you later mark as Private, those items remain in Salesforce. The corresponding Salesforce items, however, will no longer receive updates if you modify the ones in Outlook.

- If you don't want certain Outlook items to sync, regardless of whether they're marked as Private, assign them to the category *Don't Sync with Salesforce* in Outlook. For details on using categories in Outlook, refer to your Outlook documentation.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce Overview

Resolving Your Synced Outlook Tasks

Automatic Account Assignments for Synced Contacts

After syncing contacts from Outlook, Salesforce for Outlook tries to automatically assign them to accounts.

This table describes the account assignment process.

If	Then
A contact's company matches a single Salesforce account	The contact is assigned to that account.
A contact's company matches many Salesforce accounts or none	The contact is sent to My Unresolved Items in Salesforce, which you can access from the Contact home page or the Salesforce for Outlook system tray application. You can use this list to manually assign contacts to existing accounts, create new accounts, or confirm that contacts are private.
A contact doesn't have a company name	The contact is treated as a private contact and is not sent to My Unresolved Items.
A contact's company changes in Outlook	If a matching account is found in Salesforce, the contact is assigned to that account. Otherwise, the contact is sent to My Unresolved Items to be resolved.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To assign accounts:

- "Read" on accounts and "Edit" on contacts

To create new accounts:

- "Create" on accounts and "Edit" on contacts

  AND

  "Show Quick Create"

If	Then
An unresolved contact is deleted in Outlook	The contact is removed from My Unresolved Items the next time you open the list.
An unresolved contact is changed in Outlook	The contact record is updated in My Unresolved Items. If the contact's company changes, Salesforce checks to see if that information matches any existing accounts and assigns it to an account if it finds a match.

SEE ALSO:

Syncing Contacts with Salesforce for Outlook

Resolving Your Synced Contacts

Manage Your Salesforce for Outlook Configuration

Manage How Microsoft® Outlook® Items Sync with Salesforce

Manage your contacts, events, and tasks using Outlook categories to get your Outlook items to sync with Salesforce the way you want—by either selecting the items you'd like to sync, or syncing all your items, and selecting the items you'd like to prevent from syncing.

View your sync settings from the Windows® system tray, and then manage how you'll sync your Outlook items with Salesforce.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

1. Right click the Salesforce for Outlook icon ( ) in the system tray.

2. Click **Settings**, and then click **Next**.
3. See whether you're set up to sync items with the `Sync Only the Outlook Items I Select` option or the `Sync All Outlook Items` option.
   - If you're set up to sync with the `Sync Only the Outlook Items I Select` option, Salesforce for Outlook syncs only the Outlook items you choose. You'll assign the category `Sync with Salesforce` to the items you want to sync on page 430.
   - If you're set up to sync with the `Sync All Outlook Items` option, Salesforce for Outlook syncs all your Outlook items. You'll assign the category `Don't Sync with Salesforce` to the items you want to prevent from syncing on page 430.
4. Click **Cancel**.

Choose Which Microsoft® Outlook® Items Sync with Salesforce

If you're set up to sync your Outlook contacts, events, and tasks to Salesforce using the `Sync Only the Outlook Items I Select` option in Salesforce for Outlook, you'll need to select which Outlook items you want to sync.

1. In Outlook, select the contacts, events, and tasks you want to sync.
2. On the Outlook ribbon, click **Categorize**.
3. Select the category `Sync with Salesforce`.

   The items you categorized will start syncing during the next sync cycle.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

Prevent Which Microsoft® Outlook® Items Sync with Salesforce

If you're set up to sync your Outlook contacts, events, and tasks to Salesforce using the `Sync All Outlook Items` option in Salesforce for Outlook, you can still control which items you don't want to sync.

1. In Outlook, select the contacts, events, and tasks you want to prevent from syncing.
2. On the Outlook ribbon, click **Categorize**.
3. Select the category `Don't Sync with Salesforce`.

   The items you categorized will stop syncing after the next sync cycle.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

My Unresolved Items

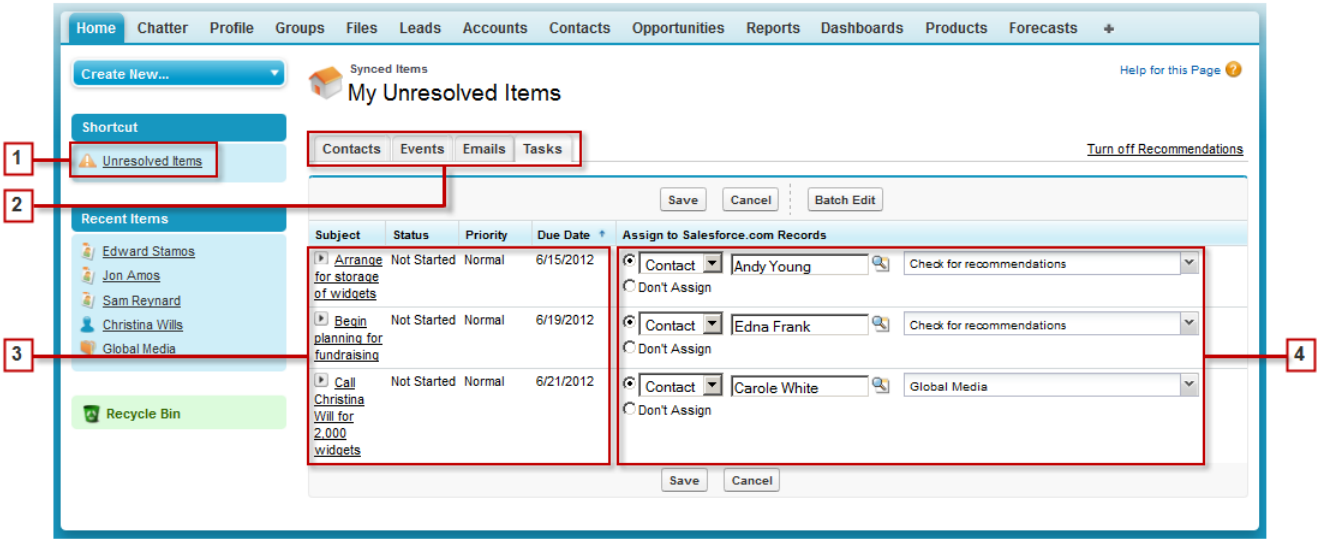
When you use Salesforce for Outlook, Exchange Sync, or Email to Salesforce to sync items or add emails from your email app to Salesforce, any items that these features can't automatically assign to Salesforce records appear in My Unresolved Items.

As part of your daily routine, you'll use this page to manage the unresolved items that require your attention. Recurring events do not appear on the My Unresolved Items page. Instead, you can go directly to the recurring events in your calendar to associate the recurring events with Salesforce records.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience (only when prompted to resolve Salesforce for Outlook items from the Windows system tray)

Available in all editions



1. Easily access the My Unresolved Items page using the **Unresolved Items** shortcut on the sidebar.
2. Quickly review unassigned items by type using the tabs Contacts, Events, and Tasks.
3. View your unassigned items.
4. Assign your items to Salesforce records—either manually or using Salesforce recommendations—or confirm you want to leave them unassigned.

Using Features that Make Resolving Items Easy

The following features help you resolve items quickly and easily.

To	Use the feature	This feature helps you save time because
Assign multiple items simultaneously	Batch Edit	You can assign up to 50 items in any one queue simultaneously.
Have Salesforce provide recommendations	Recommendations	Salesforce provides recommendations for accounts, cases, and opportunities to which you can assign your items. If you don't want to see these recommendations, click the **Turn off Recommendations** link. If you change your mind, click the **Turn on Recommendations** link. Recommendations display only when you select a contact from the lookup and the related list is empty. Salesforce displays recommendations based on the following criteria. • **Accounts:** The contact has either an account as the parent, or a contact role in the account. • **Cases:** The contact is related to the case. • **Opportunities:** The contact has a contact role in the opportunity.

IN THIS SECTION:

SEE ALSO:

Resolving Your Synced Outlook Tasks

Resolving Your Synced Contacts

Resolving Your Synced Events

Resolving Your Synced Contacts

When contacts sync from your email app with Salesforce for Outlook or Exchange Sync, some contacts are automatically assigned to accounts based on their company. The rest are added to My Unresolved Items, where you can either assign contacts to Salesforce accounts or confirm that you want to leave them unassigned.

1. Access your unresolved contacts from the sidebar shortcut **Unresolved Items**.
2. Resolve each contact in any of these ways.
   - Assign an account.
     - Select an account under Choose Suggested Account in the drop-down list. We suggest accounts only if we detect possible matches based on the contact's company. Suggested accounts always show the `Account Name` field and the first three additional fields defined in your account search layout. If your organization has contact lookup filters that prevent certain accounts from being assigned to contacts, those accounts won't appear as suggested accounts and can't be assigned to contacts.
     - Select *`Search Salesforce.com...`*. In the lookup, either click **New**, enter account information, and click **Save**, or enter search criteria, click **Go!**, and click the right account. If you don't see the lookup, you may need to first allow popups from Salesforce.
   - Leave unassigned—Select *`Don't Assign New Account`* from the drop-down list if you want to confirm that a contact with no account should remain unassigned. Unassigned contacts aren't related to Salesforce records and are visible to you and your administrator only.
   - Choose an account if there's a conflict—If the email contact and Salesforce contacts' companies are different, click *`Don't Assign New Account`* in the drop-down list to overwrite one with the other. The Salesforce account overwrites the email contact company if Salesforce is set to win, and the email contact overwrites the Salesforce account if the email contact is set to win.
   - Cancel a selection—Select *`—None Selected—`* from the drop-down list.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience (only when prompted to resolve Salesforce for Outlook items from the Windows system tray)

Available in all editions

USER PERMISSIONS

To view or edit unresolved contacts:

- "Edit" on contacts and "Read" on accounts

  AND

  Sync enabled for contacts

To create new accounts:

- "Edit" on contacts and "Create" on accounts

  AND

  "Show Quick Create"

3. Click **Save** to save your changes. All modified items are removed from the list. Remaining items continue to sync, and you can return any time to resolve them. Clicking **Cancel** cancels all changes on the page. Every contact assigned to an account now appears on the Contacts related list for that account.

Note: You can also resolve a contact from the contact record by marking it private or by assigning it to an account.

Your unresolved contacts list works like a standard list view. Click **Edit** or **Create New View** to define filters and customize columns.

SEE ALSO:

My Unresolved Items

Syncing Contacts with Salesforce for Outlook

Resolving Your Synced Events

When non-recurring events sync from your email app with Salesforce for Outlook or Exchange Sync, they appear in your Salesforce calendar and on the My Unresolved Items page. Use this page to either assign events to related Salesforce records or confirm that you want to leave them unassigned.

Note: Recurring events do not appear on the My Unresolved Items page. Instead, you can go directly to the recurring events in your calendar to associate the recurring events with Salesforce records.

1. Access your unresolved events from the sidebar shortcut **Unresolved Items**.
2. Depending on how you want to resolve an event, choose either of these actions.
   - Assign to related records—Enter a related record in one or both fields. If you need to, first select the correct record type from the drop-down list. If you assign a lead, you can't assign additional records. Clear an entry to cancel an assignment.
   - Leave unassigned—Click **Don't Assign**. Unassigned events, such as internal meetings or personal appointments, aren't linked to any other records and are visible to you only.
3. Click **Save** to save your changes. All modified items are removed from the list. Remaining items continue to sync, and you can return any time to resolve them. Clicking **Cancel** cancels all changes on the page. The event is added to the associated record's Activity History or Open Activities related list. You can't save changes if your events have a required custom field or an activity custom field becomes required after items are added to your unresolved events list.

Note: You can also resolve an event from the event record by marking it private or by assigning it to other Salesforce records using the `Related To` and `Name` fields. Assigned and private events are automatically removed from your unresolved events list. Click ▸ next to the subject to see an event's description.

SEE ALSO:

My Unresolved Items

Syncing Events with Salesforce for Outlook

EDITIONS

Available in: both Salesforce Classic and Lightning Experience (only when prompted to resolve Salesforce for Outlook items from the Windows system tray)

Available in all editions

USER PERMISSIONS

To view or edit unresolved events:

- "Edit" on events and "Read" on the objects you assign to events

  AND

  Sync enabled for events

To create new Salesforce records:

- "Edit" on events

  AND

  "Show Quick Create" and "Create" on those objects

To see recently used data in the related records fields:

- "Lookup Auto-Completion" in Search Settings

Resolving Your Synced Outlook Tasks

When tasks sync from Outlook with Salesforce for Outlook, they appear on the My Unresolved Items page. Use this page to either assign tasks to related Salesforce records or confirm that you want to leave them unassigned.

1. Access your unresolved tasks from the sidebar shortcut **Unresolved Items**.
2. Depending on how you want to resolve a task, choose either of these actions.
   - Assign to related records—Enter a related record in one or both fields. If you need to, first select the correct record type from the drop-down list. If you assign a lead, you can't assign additional records. Clear an entry to cancel an assignment.
   - Leave unassigned—Click **Don't Assign**. Unassigned tasks, such as internal meetings or personal appointments, aren't linked to any other records and are visible to you only.
3. Click **Save** to save your changes. All modified items are removed from the list. Remaining items continue to sync, and you can return any time to resolve them. Clicking **Cancel** cancels all changes on the page. The task is added to the associated record's Activity History or Open Activities related list. You can't save changes if your tasks have a required custom field or an activity custom field becomes required after items are added to your unresolved tasks list.

Note: You can also resolve a task from the task record by assigning it to other Salesforce records using the `Related To` and `Name` fields. Assigned tasks are automatically removed from your unresolved tasks list.

SEE ALSO:

My Unresolved Items

Syncing Tasks with Salesforce for Outlook

EDITIONS

Available in: both Salesforce Classic and Lightning Experience (only when prompted to resolve Salesforce for Outlook items from the Windows system tray)

Available in all editions

USER PERMISSIONS

To view or edit unresolved tasks:
- "Edit" on tasks and "Read" on the objects you assign to tasks

  AND

  Sync enabled for tasks

To create new Salesforce records:
- "Edit" on tasks

  AND

  "Show Quick Create" and "Create" on those objects

To see recently used data in the related records fields:
- "Lookup Auto-Completion" in Search Settings

Delete Items Syncing with Salesforce for Outlook

Remove an item syncing with Salesforce for Outlook from both Salesforce and Outlook by deleting the item in one system only. Take care to give special treatment to recurring tasks and recently-updated items you want to delete.

First, check the sync direction for the contact, event, or task you want to delete. Next, delete the item from the system in which the item is set to flow from. If your items are set to sync in both directions, you can delete items from either system.

As a result, Salesforce for Outlook automatically removes the corresponding item in the other system.

Note: Recurring tasks only sync from Salesforce, so there's no need to check the sync direction before deleting those items: always delete recurring tasks in Salesforce.

1. From your personal settings, enter `Salesforce for Outlook` in the `Quick Find` box, then click **View My Configuration**.
2. Review the sync direction setting for the contact, event, or (non-recurring) task that you want to delete.
3. Delete the item in the system from which sync is flowing.
   For example, if you want to delete a contact, and your contacts are set to sync from Outlook to Salesforce, delete the contact in Outlook.
   The item you deleted is removed from both systems during the next sync cycle.

If the item was not removed from both systems, you—or another sales rep—may have updated that record within the same sync cycle and Salesforce for Outlook gave preference to the update over the delete. This behavior happens as a result of `Conflict Behavior` set in someone's Salesforce for Outlook configuration, which would have let the update in one system "win" over the delete in the other. In this case, delete the record again to remove it from both systems. Or maybe check with your coworker first, who obviously cares about that item!

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To delete items syncing between Salesforce and Outlook

- "Delete" on all objects that users want to delete

View Salesforce Records in Microsoft® Outlook®

USER PERMISSIONS

To display the Salesforce Side Panel in Outlook:	"Side Panel" in your Outlook configuration
To add Outlook emails (including attachments), events, and tasks to Salesforce records:	"Add Email" in your Outlook configuration
To add specific email attachments to Salesforce:	"Allow users to select attachments" in your Outlook configuration
To add emails (including attachments), events, and tasks to multiple contacts:	"Allow Users to Relate Multiple Contacts to Tasks and Events" in Activity Settings
To add emails to multiple Salesforce records that accept tasks:	Contact Salesforce Customer Support

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

Get insight into Salesforce contacts and leads related to your important Outlook emails—directly in Outlook. The Salesforce Side Panel displays Salesforce records to which you can add Outlook emails, events, and tasks.

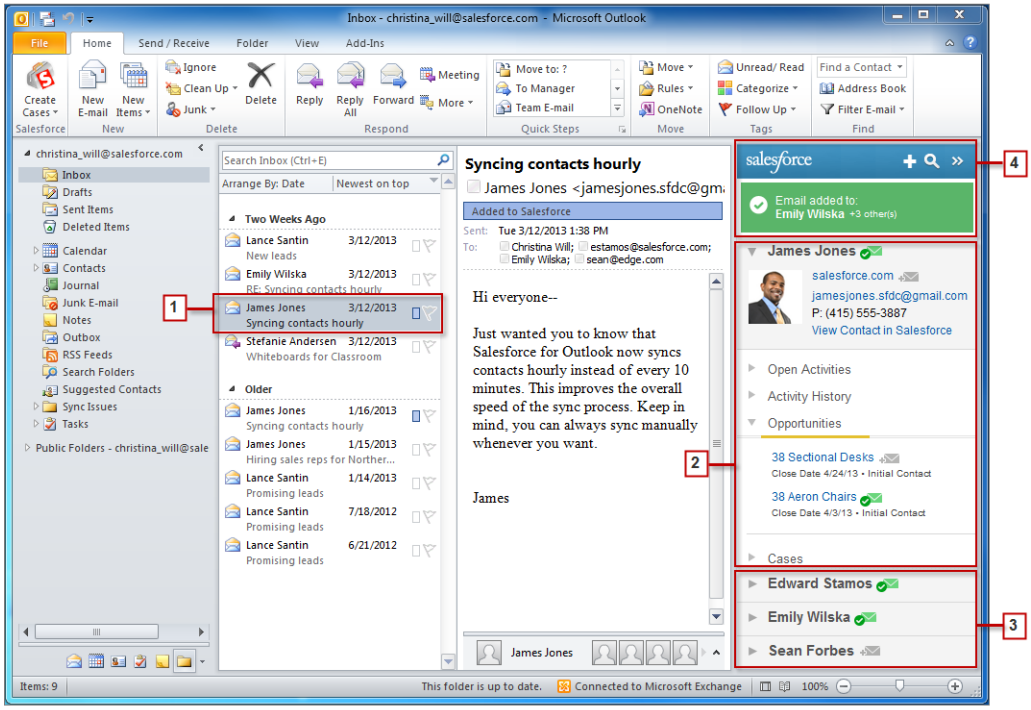
Watch a Demo: Using the Salesforce Side Panel to Work with Records in Microsoft® Outlook®

When you select an email from the Inbox or an event from the Calendar in Outlook, the Salesforce Side Panel displays related Salesforce contact and lead details directly in Outlook. After your administrator enables the side panel in your Outlook configuration, the side panel displays up to 10 contacts and leads from your email's or event's `From`, `To`, and `Cc` fields.

In addition, the Salesforce Side Panel:

- Displays as many as four activities, opportunities, and cases related to the contacts and leads that appear in the side panel.
- Makes it easy to add Outlook emails and their attachments to multiple Salesforce records, as well as add Outlook events and tasks to multiple contacts, and to one other record with which you can associate tasks, such as an account, a case, or even a custom object record.
- Discovers duplicate contacts or leads. You choose the most appropriate ones to display in the side panel.
- Lets you create Salesforce records directly from the side panel.
- Includes a Search feature to find additional Salesforce records.
- Includes links to view full record details directly in Salesforce.

Here's how you'll use the side panel.



1. Select an email or event in Outlook.
2. Review the Salesforce content that appears in the side panel, which displays contacts and leads based on the order they appear in your email's or event's `From`, `To`, and `Cc` fields. For each contact and lead, it's easy to view related activities, opportunities, and cases. If you want to view full record details, just click on a record's link to open it directly in Salesforce.

   To add your email or event to the Salesforce records of your choice, click or next to those records. Email attachments are included automatically when you add an email to Salesforce, unless your organization has enabled the feature that allows you to select specific email attachments. In that case, you'll see next to the individual attachments in your side panel. Click the icon to add those attachments to Salesforce.

If you have the Social Accounts and Contacts feature enabled in Salesforce, the side panel displays either Facebook® or Twitter™ profile photos—whichever ones you chose to show in Salesforce for those contacts and leads.

3. Select the other contacts and leads related to your email to view their details, along with related activities, cases, and opportunities.
4. Quickly see the Salesforce records to which you've added emails or events. If you'd like to create a new account, case, contact, lead, opportunity, or a custom object record related to your email, click . If you don't see records you're looking for, click to find other records, and then add emails, events, or tasks from the Outlook tasks list to them. There's even a collapse feature ( ) to hide the side panel.

IN THIS SECTION:

Add Microsoft® Outlook® Emails to Salesforce Records

Keep track of important Outlook emails related to Salesforce records from the Salesforce Side Panel.

Remove Microsoft® Outlook® Emails from Salesforce Records

You can remove Microsoft Outlook emails from your Salesforce records with the Side Panel for Salesforce for Outlook.

Add Microsoft® Outlook® Events to Salesforce Records

Add Outlook events to Salesforce records by using the Salesforce Side Panel. The event is added to the Salesforce record as an activity, which you can see on the record's Activity History or Open Activities related lists.

Add Microsoft® Outlook® Tasks to Salesforce Records

You can add Outlook tasks to multiple Salesforce contacts and to one other record that accepts tasks, like an account, a lead, or an opportunity. The task is added to the Salesforce record as an activity, which you can see on the record's Activity History or Open Activities related lists.

Create Records Directly from the Salesforce Side Panel

Quickly create different kinds of records directly from the side panel in Microsoft® Outlook®.

Searching for Salesforce Records in Microsoft® Outlook®

SEE ALSO:

Add Microsoft® Outlook® Emails to Salesforce Records

Create Records Directly from the Salesforce Side Panel

Searching for Salesforce Records in Microsoft® Outlook®

Add Microsoft® Outlook® Emails to Salesforce Records

USER PERMISSIONS	
To display the Salesforce Side Panel in Outlook:	"Side Panel" in your Outlook configuration
To add Outlook emails (including attachments), events, and tasks to Salesforce records:	"Add Email" in your Outlook configuration
To add specific email attachments to Salesforce:	"Allow users to select attachments" in your Outlook configuration
To add emails (including attachments), events, and tasks to multiple contacts:	"Allow Users to Relate Multiple Contacts to Tasks and Events" in Activity Settings

EDITIONS
This feature available to manage from: both Salesforce Classic and Lightning Experience
Available in all editions

To add emails to multiple Salesforce records that accept tasks: Contact Salesforce Customer Support

Keep track of important Outlook emails related to Salesforce records from the Salesforce Side Panel.

You'll complete this procedure using the Salesforce Side Panel, a feature that's available in Salesforce for Outlook. If you're not yet familiar with the side panel, learn about it in View Salesforce Records in Microsoft® Outlook®.

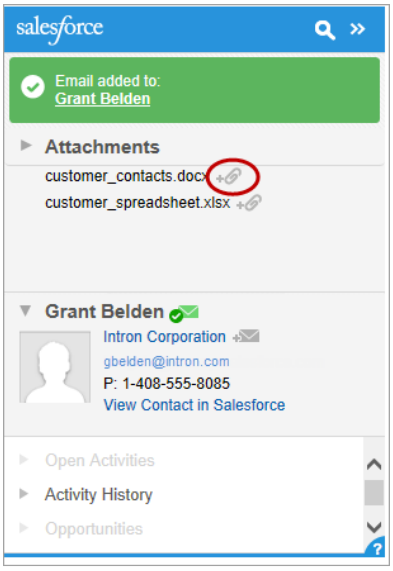
1. In Outlook, either:
   - Select an email from your Inbox.
   - Create a new email.

   You can add an email to multiple contacts and to one other record with which you can associate tasks, such as an account, a case, or an opportunity.

2. In the side panel, click for the contact, account, case, opportunity, or lead to which you want to add the email. The side panel confirms the Salesforce records to which you added your email.

   If you're sending a new email, we'll add it to Salesforce records after you click **Send**.

3. You'll add attachments differently depending on how you're set up to use the side panel.
   - If the attachments section appears after you add your email to Salesforce, click to include specific email attachments on the record.



   - If you don't see the option to add attachments, your attachments are included automatically when you add your email to Salesforce.

SEE ALSO:

Searching for Salesforce Records in Microsoft® Outlook®

Remove Microsoft® Outlook® Emails from Salesforce Records

Searching for Salesforce Records in Microsoft® Outlook®

Remove Microsoft® Outlook® Emails from Salesforce Records

USER PERMISSIONS	
To display the Salesforce Side Panel in Outlook:	"Side Panel" in your Outlook configuration
To add Outlook emails (including attachments), events, and tasks to Salesforce records:	"Add Email" in your Outlook configuration
To add specific email attachments to Salesforce:	"Allow users to select attachments" in your Outlook configuration
To add emails (including attachments), events, and tasks to multiple contacts:	"Allow Users to Relate Multiple Contacts to Tasks and Events" in Activity Settings
To add emails to multiple Salesforce records that accept tasks:	Contact Salesforce Customer Support

EDITIONS
This feature available to manage from: both Salesforce Classic and Lightning Experience
Available in all editions

You can remove Microsoft Outlook emails from your Salesforce records with the Side Panel for Salesforce for Outlook.

You'll complete this procedure using the Salesforce Side Panel, a feature that's available in Salesforce for Outlook. If you're not yet familiar with the side panel, learn about it in View Salesforce Records in Microsoft® Outlook®.

1. In Outlook, select the email you want to remove from Salesforce records.
2. In the Salesforce Side Panel, find the Salesforce record from which you want to remove the email. The upper section of the side panel displays the records to which you've already added your email.
3. With your mouse, hover over , which turns to , then click it to remove your email from the Salesforce record. The side panel displays updates for the remaining Salesforce records to which you've added your email.

SEE ALSO:

Add Microsoft® Outlook® Emails to Salesforce Records

Searching for Salesforce Records in Microsoft® Outlook®

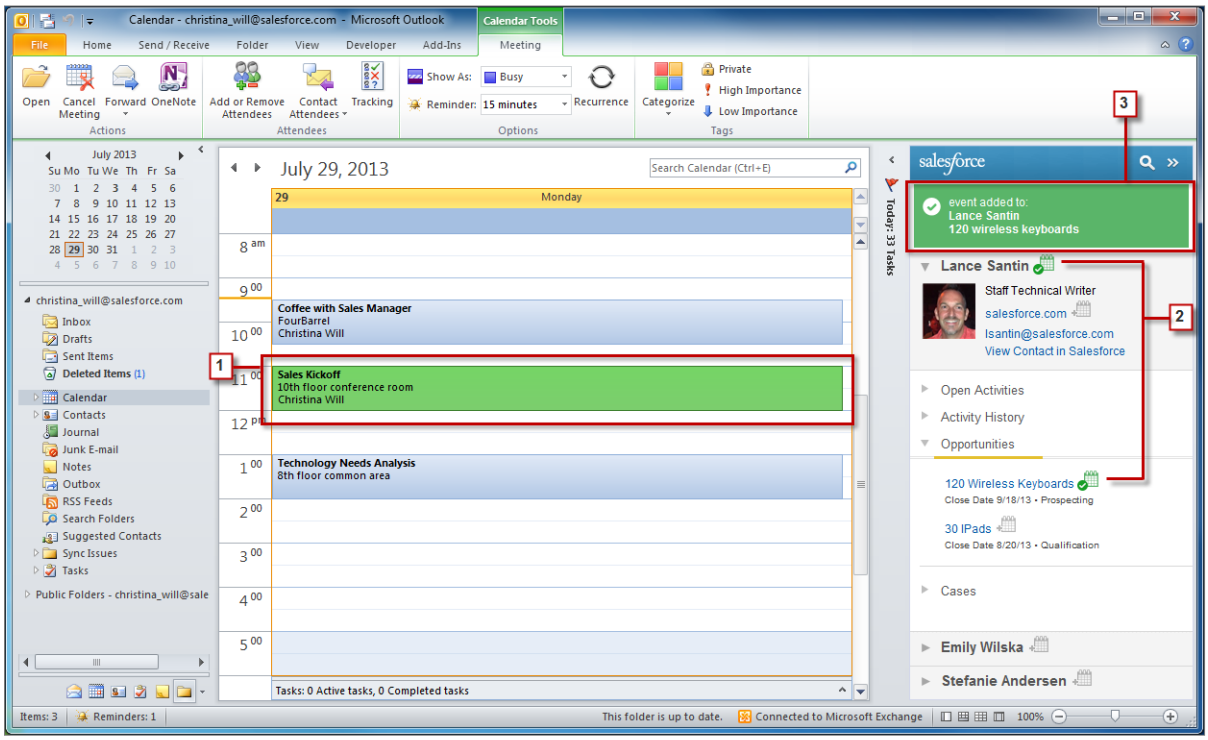
Add Microsoft® Outlook® Events to Salesforce Records

USER PERMISSIONS	
To display the Salesforce Side Panel in Outlook:	"Side Panel" in your Outlook configuration
To add Outlook emails (including attachments), events, and tasks to Salesforce records:	"Add Email" in your Outlook configuration
To add emails (including attachments), events, and tasks to multiple contacts:	"Allow Users to Relate Multiple Contacts to Tasks and Events" in Activity Settings

EDITIONS
This feature available to manage from: both Salesforce Classic and Lightning Experience
Available in all editions

Add Outlook events to Salesforce records by using the Salesforce Side Panel. The event is added to the Salesforce record as an activity, which you can see on the record's Activity History or Open Activities related lists.

1. In Outlook, select an event you want to add to Salesforce records. You can add an event to multiple contacts, and to one other record with which you can associate tasks, such as an account, a case, or an opportunity.



2. In the Salesforce Side Panel, click for the contact, account, case, opportunity, or lead to which you want to add the event. You'll see after you add the event.
3. Review the Salesforce records to which you added your event.

Add Microsoft® Outlook® Tasks to Salesforce Records

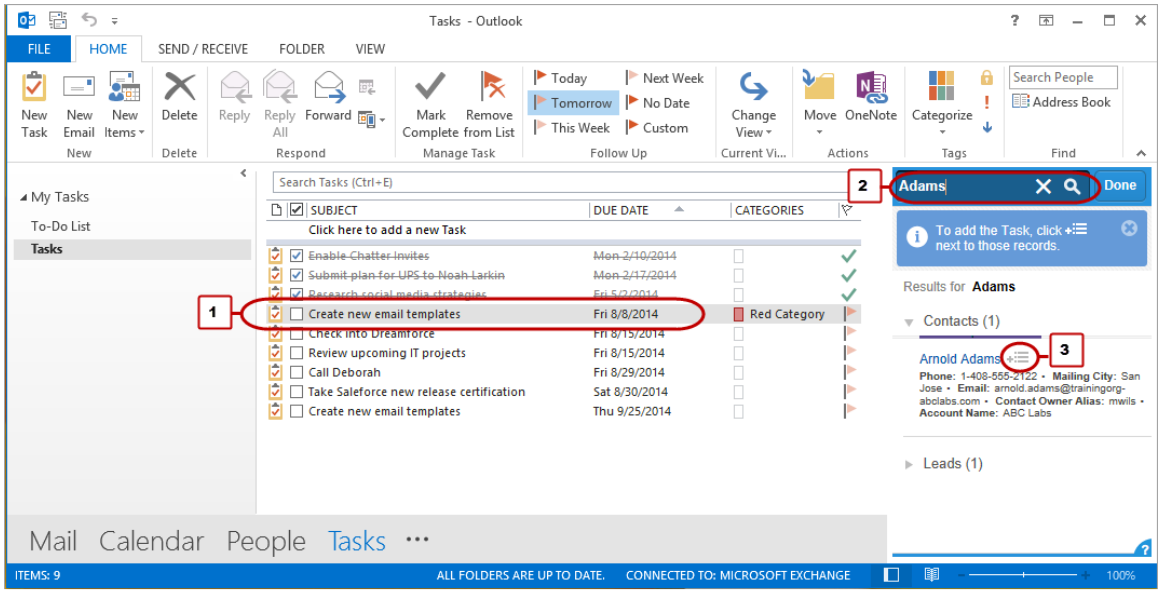
USER PERMISSIONS	
To display the Salesforce Side Panel in Outlook:	"Side Panel" in your Outlook configuration
To add Outlook emails (including attachments), events, and tasks to Salesforce records:	"Add Email" in your Outlook configuration
To add emails (including attachments), events, and tasks to multiple contacts:	"Allow Users to Relate Multiple Contacts to Tasks and Events" in Activity Settings

EDITIONS
This feature available to manage from: both Salesforce Classic and Lightning Experience
Available in all editions

You can add Outlook tasks to multiple Salesforce contacts and to one other record that accepts tasks, like an account, a lead, or an opportunity. The task is added to the Salesforce record as an activity, which you can see on the record's Activity History or Open Activities related lists.

Add Outlook tasks to Salesforce records from Tasks in Microsoft Outlook.

1. Select the task that you want to add to a Salesforce record.
2. Click in the side panel to display the Salesforce record to which you'd like to add the task.
3. Click next to the record in the search results.



You'll see after you add the task.

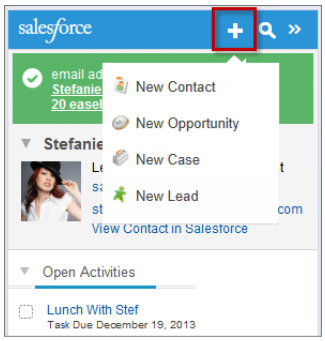
Create Records Directly from the Salesforce Side Panel

Quickly create different kinds of records directly from the side panel in Microsoft® Outlook®.

Depending on how your administrator set up your Salesforce Side Panel Publisher access, you can create accounts, cases, contacts, leads, opportunities, and other types of records customized for your organization—directly from the side panel.

1. Select an email in Outlook, then click ➕.

   You'll see something like this.



2. Choose an action.

   The actions available to you depend on the ones your administrator set up, such as New Contact.

3. Complete the record detail by providing relevant details.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

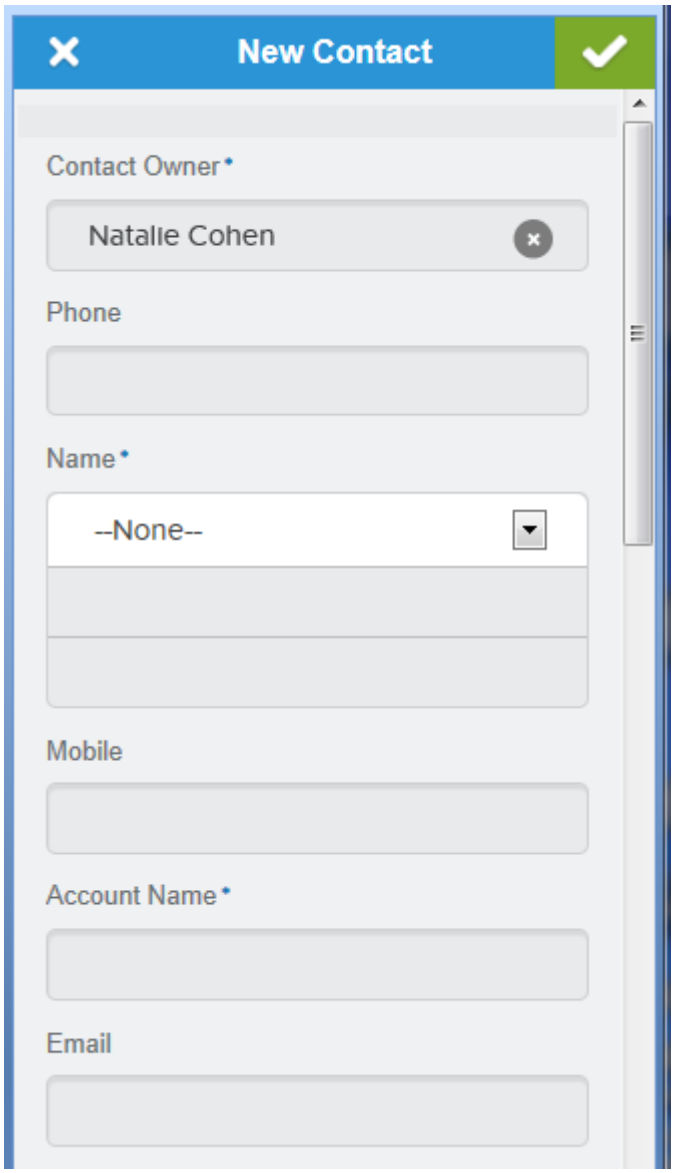
USER PERMISSIONS

To display the Salesforce Side Panel:

- "Side Panel" in Outlook configurations

To create new records from the Salesforce Side Panel:

- "Create" and "Read" on all objects that users create records from AND "Visible" on all required fields in records that users create



4. Click to save the record.

   Keep in mind that email attachments aren't included in the created records.

Searching for Salesforce Records in Microsoft® Outlook®

USER PERMISSIONS	
To display the Salesforce Side Panel in Outlook:	"Side Panel" in your Outlook configuration
To add Outlook emails (including attachments), events, and tasks to Salesforce records:	"Add Email" in your Outlook configuration

EDITIONS
This feature available to manage from: both Salesforce Classic and Lightning Experience
Available in all editions

To add specific email attachments to Salesforce:	"Allow users to select attachments" in your Outlook configuration
To add emails (including attachments), events, and tasks to multiple contacts:	"Allow Users to Relate Multiple Contacts to Tasks and Events" in Activity Settings
To add emails to multiple Salesforce records that accept tasks:	Contact Salesforce Customer Support

You'll complete this procedure using the Salesforce Side Panel, a feature that's available in Salesforce for Outlook. If you're not yet familiar with the side panel, learn about it in View Salesforce Records in Microsoft® Outlook®.

When you're viewing details that appear in the Salesforce Side Panel, you may want to search for additional Salesforce records. Search results display contacts and any other records with which you can associate tasks, such as a campaign, a case, or an opportunity.

1. From Outlook, select an email for which you want to display additional Salesforce records.
2. In the side panel, click .
3. Type your search term. For example, if you want to search for Salesforce records related to *desktops*, type `desktop`.
4. Click the search icon to display Salesforce records related to your search term.

SEE ALSO:

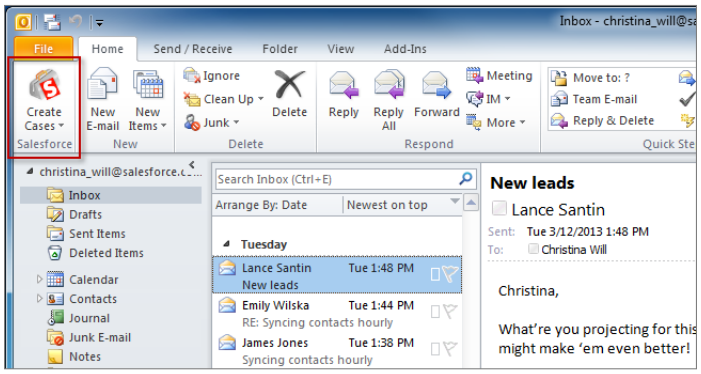
View Salesforce Records in Microsoft® Outlook®

Add Microsoft® Outlook® Emails to Salesforce Records

Create Cases from the Outlook Ribbon with Salesforce for Outlook

Note: Before you use this feature, consider creating records directly from the Salesforce Side Panel instead. Just keep in mind that when you create cases from the side panel, email attachments aren't included.

If you don't see the **Create Cases** drop-down list button in Microsoft® Outlook®, contact your administrator, who can enable this feature.



If you track cases in Salesforce, you can create new ones from your Microsoft® Outlook® emails. Your administrator needs to first create Email-to-Case destinations that appear in the drop-down list

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To include email attachments when you create cases:

- "Always save email attachments" in your Email to Salesforce settings

  AND

  "Add Email" in your Salesforce for Outlook Configuration

button **Create Cases** in Outlook. For each destination, you can choose the assignee, which can be either individual users or queues. When you create cases, you can add up to ten emails simultaneously for each destination.

1. In Outlook, select up to 10 sent or received emails and click **Create Cases**.
2. Select a destination from the drop-down list. Salesforce for Outlook adds the emails you selected as a case in Salesforce.

SEE ALSO:

Create Records Directly from the Salesforce Side Panel

Edit Your Salesforce for Outlook Email Settings

Access Salesforce for Outlook Settings and Tools

Salesforce for Outlook FAQ

Take a look at some common questions that come up for Salesforce for Outlook.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

Category	Questions
General Salesforce for Outlook Questions	What's the difference between private items in both Salesforce and Microsoft® Outlook®?
Installing Salesforce for Outlook	Does Salesforce for Outlook support terminal servers? Why is my Salesforce for Outlook installation failing on the prerequisites screen?
Configuring Salesforce for Outlook	Why can't I log in to Salesforce for Outlook? Can I map custom fields I'm syncing with Salesforce for Outlook? Can I mass configure Salesforce for Outlook? Can I use filter logic in Salesforce for Outlook data sets?
Syncing with Salesforce for Outlook	Should I sync Outlook or use import wizards to upload my data into Salesforce? Can I sync person accounts by using Salesforce for Outlook? Can I add cases using Salesforce for Outlook? Can I associate Outlook records to custom objects using Salesforce for Outlook?
Managing Synced Records	Why does Salesforce for Outlook create duplicate records in Microsoft® Outlook®? Why does Salesforce for Outlook create duplicate contacts in Salesforce and Microsoft® Outlook®? Why does Salesforce for Outlook delete my Outlook records after I sync?
Adding Emails to Salesforce for Outlook	Why isn't Salesforce for Outlook adding emails to the right contact or lead in Salesforce?

Category	Questions
	Why can't I add emails to Salesforce? When I add emails to Salesforce, how can I include email attachments?
Syncing Contacts	How do I enable contacts for sync in Salesforce for Outlook?
Protecting Your Data	How does Salesforce for Outlook protect emails? Does Salesforce support single sign-on (SSO) for Salesforce for Outlook? How secure is Salesforce for Outlook?

What's the difference between private items in both Salesforce and Microsoft® Outlook®?

Private items in Microsoft Outlook and Salesforce differ in unexpected ways. Before choosing to sync private events, consider how they're displayed to colleagues in each system.

Item	Private in Outlook	Marked private in Salesforce
Contacts	Your Exchange administrator can see your contacts. Other users cannot.	Other Salesforce users can see contacts that are associated with accounts. Contacts that aren't associated with accounts are private and aren't visible to other Salesforce users except for Salesforce administrators who can view, edit, and report on contacts.
Events	Your Exchange administrator can see your events. Other users cannot.	Only blocks of time, and not event details are visible to other Salesforce users, except for Salesforce administrators who can view, edit, and report on contacts.
Tasks	Your Exchange administrator can see your tasks. Other users cannot.	Salesforce doesn't include any means for keeping tasks private. So other Salesforce users can see your tasks.

SEE ALSO:

- Desktop-Based Salesforce for Outlook
- Syncing Between Microsoft® Outlook® and Salesforce Overview

Does Salesforce for Outlook support terminal servers?

No. Salesforce for Outlook does not support terminal servers, such as Citrix.

SEE ALSO:

- Desktop-Based Salesforce for Outlook

Why is my Salesforce for Outlook installation failing on the prerequisites screen?

Your system may not meet all system requirements for Salesforce for Outlook. Verify your system meets these requirements, then try installing Salesforce for Outlook again.

SEE ALSO:

Desktop-Based Salesforce for Outlook

Install and Set Up Salesforce for Outlook

Why can't I log in to Salesforce for Outlook?

Your inability to log in may be related to your company's IP address requirements. If your organization restricts IP addresses, logins from untrusted IPs are blocked until they're activated. Salesforce automatically sends you an activation email that you can use to log in. The email contains a security token that you must add to the end of your password. For example, if your password is `mypassword`, and your security token is `XXXXXXXXXX`, you must enter `mypasswordXXXXXXXXXX` to log in.

SEE ALSO:

Desktop-Based Salesforce for Outlook

Can I map custom fields I'm syncing with Salesforce for Outlook?

Yes. You can map a Salesforce field to a custom Outlook field, or an Outlook field to a custom Salesforce field using Salesforce for Outlook. These field types are available to map:

- Outlook text fields
- Salesforce text fields
- Some Salesforce picklist fields

To map to custom fields, open an Outlook configuration. Under `Field Mapping`, select `Custom Field...` from the end of the corresponding `Outlook Field` picklist. Enter the field's name and click **OK**.

SEE ALSO:

Specify Which Salesforce Fields Sync to Microsoft® Outlook®

Can I mass configure Salesforce for Outlook?

Yes, you can create a configuration in Salesforce and assign it to profiles or even specific users. When those users set up Salesforce for Outlook, the configuration's settings are automatically deployed to Outlook.

SEE ALSO:

Manage Your Salesforce for Outlook Configuration

Can I use filter logic in Salesforce for Outlook data sets?

No, you can't use filter logic to limit which records your users sync using Salesforce for Outlook.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce Overview

Can I sync person accounts by using Salesforce for Outlook?

No. You can't upload person accounts by using Salesforce for Outlook.

For information on how to import person accounts into your Salesforce organization, see Import My Person Accounts.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce Overview

Can I add cases using Salesforce for Outlook?

Yes, Salesforce for Outlook supports adding emails to Salesforce as cases.

SEE ALSO:

Create Cases from the Outlook Ribbon with Salesforce for Outlook

Can I associate Outlook records to custom objects using Salesforce for Outlook?

You can assign synced events and tasks to several different objects, including custom objects, but you can assign synced contacts only to accounts.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce Overview

Why does Salesforce for Outlook create duplicate records in Microsoft® Outlook®?

If you either mark items as Private or assign them to the Outlook category *Don't Sync with Salesforce*, and you sync contacts, events, and tasks from Salesforce to Outlook, Salesforce for Outlook may create duplicate records in Outlook.

This can happen if you have Salesforce items that contain the same information as the Outlook items you either marked as Private or assigned to the category *Don't Sync with Salesforce*. These items were never mapped to each other, so Salesforce for Outlook treats them separately, resulting in duplicates.

If you want to remove duplicates, it's best to remove the ones in Outlook that you either marked as Private or assigned to the Outlook category *Don't Sync with Salesforce*. Doing this ensures that you don't delete information in Salesforce to which other users may have contributed.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce Overview

Why does Salesforce for Outlook create duplicate contacts in Salesforce and Microsoft® Outlook®?

If you sync your team's records and they include different information for some of the same contacts you own, Salesforce for Outlook may create duplicate contacts in both Salesforce and Outlook.

For example, you and a team member both have a contact for Christina Wills. But the two contacts list different companies for her. Salesforce for Outlook syncs the contacts for you and your team members, resulting in duplicates in Salesforce and Outlook.

To avoid this, coordinate with your team members so you share the same contact information. You'll need to remove the contacts containing the outdated information.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce Overview

Why does Salesforce for Outlook delete my Outlook records after I sync?

Salesforce for Outlook automatically syncs records you own, as well as records to which you have read/write access that are:

- Associated with accounts you own
- Associated with accounts of which you are an account team member
- Owned by members of your sync profile's groups

If you try to sync a record from Outlook to Salesforce that doesn't fit in the above categories, the sync process may attempt to delete that record from Outlook during a later sync. To avoid deletion of these records, assign them to the Outlook category *Don't Sync with Salesforce*.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce Overview

Why isn't Salesforce for Outlook adding emails to the right contact or lead in Salesforce?

One of the following may be occurring.

If you have	Salesforce for Outlook may be adding your emails to	You should
Duplicate records in Salesforce for Outlook	The wrong records	Consider merging the duplicate records
No matching record in Salesforce for Outlook	My Unresolved Items list	Add the matching contacts or leads to Salesforce and associate the unresolved emails with your new contacts or leads

SEE ALSO:

Edit Your Salesforce for Outlook Email Settings

Why can't I add emails to Salesforce?

If you receive the error message `User is not authorized to send emails to this service` when you use Salesforce for Outlook to add emails, your email address isn't authorized in Salesforce.

To authorize email addresses in Salesforce:

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

2. In My Acceptable Email Addresses, enter the email addresses you want to authorize. Salesforce allows you to add emails through Salesforce for Outlook from only the addresses listed in this field. You cannot leave this field empty.

SEE ALSO:

Edit Your Salesforce for Outlook Email Settings

When I add emails to Salesforce, how can I include email attachments?

You can include email attachments when you add emails to Salesforce if you and your administrator have enabled the correct settings, and your Salesforce organization has enough space to store the attachment.

When you add an email to Salesforce, the email is added as a new task. Email attachments are included on the `Attachments` related lists.

Depending on how your administrator configured your settings, you can add email attachments to Salesforce in one of several ways.

If you're using	You enable	Your administrator enables	Attachments are added to Salesforce like this
Salesforce for Outlookwith side panel		`Side Panel` and `Add Email` in your Outlook configuration	Automatically, after you add an email to Salesforce from the side panel.
		`Side Panel`, `Add Email`, and `Allow users to select attachments` in your Outlook configuration	When you select after you add an email to Salesforce from the side panel.
Salesforce for Outlook without side panel	`Email to Salesforce` in your Email settings, with `Always save email attachments` selected	`Email to Salesforce` for your organization and an active Outlook configuration that includes you	Automatically, after you add an email to Salesforce using the `Add Emails` or `Send and Add` buttons in Outlook.
Email to Salesforce	`Email to Salesforce` in your Email settings, with `Always save email attachments` selected	`Email to Salesforce` for your organization	Automatically, after you send the email to your Email to Salesforce address.

SEE ALSO:

Add Microsoft® Outlook® Emails to Salesforce Records

Set Up Email to Salesforce

How do I enable contacts for sync in Salesforce for Outlook?

Your administrator needs to perform the following two tasks before you can sync contacts between Microsoft® Outlook® and Salesforce.

- Your administrator creates a configuration that allows users to sync contacts.
- Your administrator defines a data set for that configuration.

After your administrator performs those tasks, you may have permissions to enable contacts for sync by completing the following procedure.

1. From your personal settings, enter `Salesforce for Outlook` in the `Quick Find` box, then select **Salesforce for Outlook**.
2. Click **View My Configuration**.
3. Under the Sync Settings section, verify you have **Contacts** selected. If you're unable to select it, contact your administrator, who can enable contact syncing for you.

SEE ALSO:

Edit Your Salesforce for Outlook Sync Settings

Syncing Contacts with Salesforce for Outlook

How does Salesforce for Outlook protect emails?

Salesforce supports both delegated authentication and Security Assertion Markup Language (SAML) requirements for Salesforce for Outlook. When using SAML for Salesforce for Outlook, My Domain is required.

SEE ALSO:

Edit Your Salesforce for Outlook Email Settings

Does Salesforce support single sign-on (SSO) for Salesforce for Outlook?

Yes. Salesforce supports both delegated authentication and Security Assertion Markup Language (SAML) requirements for Salesforce for Outlook. When using delegated authentication, users need to log into Salesforce the first time they use Salesforce for Outlook. When using SAML for Salesforce for Outlook, My Domain is required.

How secure is Salesforce for Outlook?

Salesforce for Outlook, a .NET application you install on your machine, securely connects to Salesforce. Specifically,

For	Salesforce for Outlook uses
Usernames and passwords	OAuth 2.0 to authenticate with Salesforce. We store usernames and encrypted OAuth refresh tokens locally. We never store passwords.
Connections to Salesforce	SSL 128-bit encryption through an HTTPS connection.

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:

How do I uninstall Connect for Outlook?

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.

Relate Emails to Salesforce Records with Email to Salesforce

Relate emails to leads, contacts, and opportunities or to other specific records in Salesforce. That way, it's easy to track your sales-related communications.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

IN THIS SECTION:

How Does Email to Salesforce Work?

Before you use Email to Salesforce, find out how it works.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

When composing, forwarding, or replying to an email, you enter a special Email to Salesforce address in the BCC field (or any other recipient field). Salesforce receives a copy of the email. Depending on your configuration, Salesforce adds the email to the Activity History related list of the record whose email address matches the recipient's email address or to the My Unresolved Items page. From the My Unresolved Items page, you can manually assign the email to a record. Unassigned emails also appear in your open task list.

Relating Emails to Leads, Contacts, and Opportunities

If you configure Email to Salesforce to associate emails to matching leads or contacts, Salesforce searches the `To` and `CC` fields for the email addresses of your leads or contacts. If any leads or contacts are found, Salesforce saves the email to the Activity History related list on the appropriate record.

If you configure Email to Salesforce to associate emails to matching opportunities, Salesforce searches the `To` and `CC` fields for the email addresses of your contacts. If contacts are found, Salesforce saves the email to the Activity History related list on all open opportunities, as long as the contact is assigned a contact role on the opportunity.

If Salesforce can't match any email addresses for recipients that appear in the `To` and `CC` fields of emails that you add to Salesforce, the My Unresolved Items page displays one row for each email.

Relating Emails to Specific Records

To relate an email to a specific Salesforce record, include the record ID in the subject line or body of the email.

If you configure Email to Salesforce to associate email with matching leads, contacts, or opportunities, an unresolved task is created when an email is associated with a lead, contact, or opportunity using a record ID but not a matching email address. For example, if you configure emails to be associated with matching leads, and you send an email directly to your Email to Salesforce address with a lead record ID in the body or subject line of the email, the email is associated with the lead, and an unresolved task is created.

Getting Started

When your Salesforce admin activates Email to Salesforce, you receive an email that contains your system-generated Email to Salesforce address. This address also appears in your personal settings.

Access your personal settings to configure Email to Salesforce before you use it.

SEE ALSO:

Considerations for Using Email to Salesforce
Set Up Email to Salesforce
Relate Emails to Your Salesforce Records
Guidelines for Using Email to Salesforce

Considerations for Using Email to Salesforce

Before you use Email to Salesforce, consider a few key points.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

General Considerations

- Use Email to Salesforce with email client applications such as IBM® Lotus Notes® and Microsoft® Outlook® and with webmail such as Gmail® and Yahoo! Mail®.
- Email to Salesforce attempts to match the email address in the `To` or `CC` fields with the one in the `Email` standard field. Email to Salesforce doesn't support matching on custom email fields.
- Salesforce ignores invalid IDs or IDs for records that you don't have read access to.
- Email to Salesforce is required to use the Add Email feature with Salesforce for Outlook. Disabling one feature disables the other. With Salesforce for Outlook, you add emails via Add Email and Send and Add, not the `BCC` field.
- If you enter a recipient's email address in the `BCC` field, the owner of the address receives the email, but the email isn't related to records that contain the email address.

Limits

- The maximum number of email addresses that Email to Salesforce can match is 50. If the combined number of addresses in the `To` and `CC` fields exceeds this limit, Email to Salesforce processes only the first 50 unique addresses in the email.
- Email to Salesforce can create a maximum of 50 email activities for each email that it receives. It can relate up to 50 contacts to each email task record.
- The size limit for an attached file is 25 MB when attached directly to the related list. The size limit for multiple files attached to the same email is 25 MB, with a maximum size of 5 MB per file. For each matching record, all attachments that are sent with the email are duplicated, which affects your data size limit. Any attachments that aren't added are listed in the confirmation email that you receive from Salesforce.
- Email text and HTML are truncated to 32 KB.

Set Up Email to Salesforce

To be able to use Email to Salesforce, start by configuring it.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

1. From your personal settings, enter *`Email to Salesforce`* in the `Quick Find` box, then select **My Email to Salesforce**.
2. Enter the email addresses that you'll use to send email in `My Acceptable Email Addresses`. Separate multiple email addresses with commas.

   Important: Your Email to Salesforce address accepts email only from addresses that you list here. If you don't list an email address, email that's sent to your Email to Salesforce address isn't associated with any records.
3. Under Email Associations, select options as needed.
4. If you exclude multiple email domains from automatic association in `Excluded Domains`, separate them with commas.
5. Click **Save**.

SEE ALSO:

Considerations for Using Email to Salesforce

Relate Emails to Your Salesforce Records

Guidelines for Using Email to Salesforce

Relate Emails to Your Salesforce Records

Relate emails to leads, contacts, and opportunities, or to specific Salesforce records, to track your sales-related communications.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

To relate emails to leads, contacts, or opportunities:

1. Compose an email from an email account that you listed in `My Acceptable Email Addresses` on the My Email to Salesforce setup page.
2. Enter your Email to Salesforce address in the `BCC` field.
3. Send the email.

To relate emails to specific Salesforce records:

1. Compose an email from an email account that you listed in `My Acceptable Email Addresses` on the My Email to Salesforce setup page.

2. In Salesforce, locate the record ID of the record to associate the email with. The record ID is the 15-digit, case-sensitive, alphanumeric code at the end of the URL for the record.
3. In the subject line or body of the email, type `ref:` followed by the record ID. For example: `ref: 701D0000000HQZy`.
4. Enter your Email to Salesforce address in the `To`, `CC`, or `BCC` fields.
5. Send the email.

SEE ALSO:

Considerations for Using Email to Salesforce

Guidelines for Using Email to Salesforce

Set Up Email to Salesforce

Guidelines for Using Email to Salesforce

If you're using Email to Salesforce, review a few key points for additional information.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

General Guidelines

- For easy access, add your Email to Salesforce address to the address book of your email program.
- When you use Email to Salesforce to save a message as an email activity, the default task type is specified by the `Send Email Default` setting. To change the default value, edit the `Task Type` picklist field.
- Emails that come from excluded domains go to My Unresolved Items. From there, manually assign them or leave them unassigned.
- To save a message as an email activity without sending it to another person, forward the email with your Email to Salesforce address in the `To` field. Make sure that no other email address is in the `To`, `CC`, or `BCC` fields. Salesforce receives a copy of the email and searches the `From`, `To`, and `CC` fields in the forwarded email for the email addresses of your leads and contacts. If any leads or contacts are found, Salesforce saves the email in the Activity History related list on the appropriate record.
- If Email to Salesforce matches an email address to multiple lead or contact records in Salesforce, you can associate the email with all matching records, the oldest record, or the record with the most activity.
- If Email to Salesforce matches an email to multiple opportunity records in Salesforce, the email is included in the activity history on all matching open records.

Record IDs

- The record ID is the 15-digit, case-sensitive, alphanumeric code at the end of the URL for a record. For example, if you view the detail page of a campaign record, the URL resembles this one: `https://na1.salesforce.com/701D0000000HQZy`. The record ID for this record is 701D0000000HQZy.
- You can type record IDs on a separate line or within the email body text if surrounded by (), [], or {}. For example: `(ref: 701D0000000HQZy)`. Separate multiple record IDs with commas, for example: `ref: 701D0000000HQZy, 801D0000000IRAz, 901D0000000JSBa`.

Handle Emails That Email to Salesforce Doesn't Assign to Records

USER PERMISSIONS	
To view or edit unresolved emails:	"Edit" on tasks and "Read" on the objects that you assign to the email AND "Email to Salesforce" OR "Add Email" in Salesforce for Outlook and "Email to Salesforce"
To create Salesforce records:	"Edit" on tasks AND "Show Quick Create" and "Create" on those objects
To see recently used data in the related records fields:	"Lookup Auto-Completion" in Search Settings

EDITIONS
Available in: both Salesforce Classic and Lightning Experience (only when prompted to resolve Salesforce for Outlook items from the Windows system tray)
Available in all editions

When emails are sent to Salesforce via Email to Salesforce or Salesforce for Outlook, some are assigned to related records based on your Email to Salesforce settings. The rest are added to My Unresolved Items, where you assign them to related Salesforce records or confirm that you want to leave them unassigned.

1. Access your unassigned emails in My Unresolved Items.
2. Choose one of these actions.
   - Assign to related records: Enter a related record in one or both fields. If you need to, select the correct record type from the drop-down list. If you assign a lead, you can't assign more records. To cancel an assignment, clear an entry.
   - Leave unassigned: The text `Unresolved Email:` is removed from the subject line, and the email is assigned to you as a completed task. If the task's `Status` picklist includes more than one "completed" status, Salesforce uses the first one.
3. Save your changes.

   Assigned emails are added to the associated records. All modified items are removed from the list.

Using Salesforce-Integrated Email FAQs

Can I use Salesforce to send mass emails?

If you want to send mass marketing emails, we suggest using a third-party application in the AppExchange that allows you to centrally manage email campaigns and track the responses back to Salesforce. This allows your marketing team to track the number of qualified leads and ROI for their email campaigns.

If you want to send mass sales emails, in Salesforce click **Contacts**. Then, in the Tool section, choose **Mass Email Contacts**, and follow the Mass Email wizard.

SEE ALSO:

Send Mass Email in Salesforce Classic

Can I use Salesforce to send HTML emails?

Can I use Salesforce to send HTML emails?

Yes, you can use Salesforce to send HTML emails to contacts, leads, person accounts, and users in your organization. You can send emails to individuals, send mass emails to multiple contacts, and set up templates for HTML emails you send frequently.

SEE ALSO:

Send Email in Salesforce Classic

Generating Form Letters with Templates

Mail Merge

A mail merge is the process of generating form letters and other Microsoft® Word documents that are personalized for the recipient, who is often a contact or lead. The content of each document is predefined in a mail merge template. Mail merge templates include variables called merge fields where data from your Salesforce records—for example a contact's name and address—displays in the generated document.

EDITIONS

This feature is available in both Salesforce Classic

Available in all editions

Important: When Salesforce disables TLS 1.0, we're retiring support for standard Mail Merge. This change means that sales reps can no longer generate mail merge documents in Microsoft® Word. Even if reps are able to access the feature, Salesforce no longer provides support or maintenance when there is an issue. But don't worry! Reps can continue running mail merges with Salesforce data when you migrate them to Extended Mail Merge.

Note: Standard mail merge requires:

- Microsoft® Internet Explorer® versions 9, 10, and 11
- Microsoft Word 2003 or 2007
- Microsoft Windows® XP and Windows Vista® (32-bit only) - Until Salesforce disables TLS 1.0, when Windows Vista is no longer supported.

Generating Single Mail Merge Documents

To generate a Microsoft Word document for an individual record, open the record's detail page and click **Mail Merge** on the Activity History related list.

SEE ALSO:

Installing the Mail Merge ActiveX Control

Generate Mass Mail Merge Documents with Extended Mail Merge

Send a Single Mail Merge Document

Installing the Mail Merge ActiveX Control

When Salesforce disables TLS 1.0, we're ending support for Standard Mail Merge. To continue creating mail merges with your Salesforce data, contact Salesforce Customer Support to enable Extended Mail Merge..

Important: When Salesforce disables TLS 1.0, we're retiring support for standard Mail Merge. This change means that sales reps can no longer generate mail merge documents in Microsoft® Word. Even if reps are able to access the feature, Salesforce no longer provides support or maintenance when there is an issue. But don't worry! Reps can continue running mail merges with Salesforce data when you migrate them to Extended Mail Merge.

With standard mail merge, the first time you generate a mail merge document you must install an ActiveX control that helps Salesforce communicate with Word. **You must be logged in as a Windows user with sufficient administrative privileges to download ActiveX controls.** If you are unable to download ActiveX controls, contact your IT department or Windows system administrator for assistance.

Standard mail merge requires:

- Microsoft® Internet Explorer® versions 9, 10, and 11
- Microsoft Word 2003 or 2007
- Microsoft Windows® XP and Windows Vista® (32-bit only) - Until Salesforce disables TLS 1.0, when Windows Vista is no longer supported.

Configure your Web browser to accept ActiveX controls as follows:

1. Click **Tools** > **Internet Options** to open the Internet Options dialog.
2. Go to the Security tab.
3. Click the icon for the **Internet** zone, then click **Custom level**.
4. In the "ActiveX controls and plug-ins" section, select `Enable` or `Prompt` for the following settings: "Download signed ActiveX controls," "Run ActiveX controls and plug-ins," and "Script ActiveX controls marked safe for scripting."
5. In the "Downloads" section, select `Enable` for the "File download" setting.
6. Click **OK**.
7. Repeat the custom level settings above for the **Trusted sites** zone.
8. Ensure that Salesforce is a trusted site by clicking the **Sites** button and looking for `https://*.salesforce.com` in the list. If it is not there, type `https://*.salesforce.com` in the text box and click **Add**. Click **OK**.
9. Go to the Advanced tab of the Internet Options dialog.
10. In the Security section at the bottom of the Settings box, confirm that "Do not save encrypted pages to disk" is blank and does not have a check mark.
11. Click **OK**.

12. You may need to restart Internet Explorer for your changes to take effect.

If you use Internet Explorer 7 or 8, the first time you perform a mail merge, the popup message `Exception: Automation server can't create object` may occur. You can disregard this message. Click **OK** to close the popup and proceed with your mail merge.

Note: Extended Mail Merge does not require the installation of an ActiveX control.

SEE ALSO:

Mail Merge

Managing Templates

Your administrator can create and maintain templates for defining letterheads, sending outbound email, and generating mail merge documents.

- Letterheads define the look and feel of your HTML email templates. Your HTML email templates can inherit the logo, color, and text settings from a letterhead.
- Email templates allow you to send email to contacts, leads, and others using predefined templates.
- Mail merge templates allow you to create custom documents using the information from your records. For example, you can create a customized thank you letter to a specific lead.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

SEE ALSO:

Create a Letterhead

Manage Email Templates

Create Mail Merge Templates

1. Open a new blank document in Microsoft® Word 2007.
2. Use Word to compose the document so it contains the text, data, and formatting your users require.
3. Locate the text or data variables in your Word document that will change each time the template is used. For example, in the salutation "Dear Bob," "Bob" is a variable because it will change when the letter is sent to a different person.
4. Replace each variable with the appropriate Salesforce merge field.

   Important: Each mail merge field label you use must be unique.

   a. Place your cursor where you want to insert a merge field.
   b. In Word 2007, select the Insert tab on the Ribbon, click **Quick Parts** in the Text group, and then click **Field**.
   c. Select **Mail Merge** in the Categories drop-down list.
   d. Select **MergeField** in the Field names box.
   e. In the Field Properties area of the Field name box, manually enter the valid merge field, such as `Opportunity_LineItem_ProductName`. To create a complete list of the standard and custom fields available in your Salesforce organization, visit the Locate Record Field Names for Mail Merge article.

EDITIONS

This feature is available in both Salesforce Classic

Available in all editions

USER PERMISSIONS

To upload mail merge templates:
- "Manage Public Templates"

To edit mail merge templates:
- "Manage Public Templates"

f. Click **OK**.

Note: To list information about all products associated with an opportunity, insert the `Opportunity_LineItem_Start` merge field where you want to begin listing product information. Then, insert all the merge fields you want to include for each product on an opportunity. Finally, insert the `Opportunity_LineItem_End` to end the list.

5. Save your Word document.
6. Proceed to Uploading Mail Merge Templates to Salesforce on page 463.

Tip: For best results:

- Do not configure mail merge templates as "protected" or "restricted access" in Microsoft Word. Please refer to Word's help for information about protected Word documents. (In Word, press F1 to open help.)
- Do not connect mail merge templates to external data sources such as Excel worksheets or Access databases. Please refer to Word's help for information about restoring mail merge documents to what Word calls "normal Word documents."

SEE ALSO:

Mail Merge

Modify Existing Mail Merge Templates

EDITIONS

This feature is available in both Salesforce Classic

Available in all editions

USER PERMISSIONS

To upload mail merge templates:

- "Manage Public Templates"

To edit mail merge templates:

- "Manage Public Templates"

1. Download the sample mail merge templates and unzip the files to a convenient directory on your hard drive.
2. Review the instructions provided in `salesforce_mailmerge_templates_howto.doc`.
3. Open the desired sample template in Microsoft Word.
4. Save a copy of the sample template to your computer's desktop or other convenient location. In Word 2007, select **Save As** from the Office button then choose an appropriate file name and destination folder.
5. Optionally, customize the text and formatting of the template.
6. Press ALT+F9 to display the hidden mail merge field codes.

   Each of the mail merge fields should now appear in curly braces as follows: `{MERGEFIELD Contact_FullName \* MERGEFORMAT}`
7. Change or add merge fields as necessary.
   a. Place your cursor where you want to insert a merge field.
   b. In Word 2007, select the Insert tab on the Ribbon, click **Quick Parts** in the Text group, and then click **Field**.
   c. Select **Mail Merge** in the Categories drop-down list.
   d. Select **MergeField** in the Field names box.
   e. In the Field Properties area of the Field name box, manually enter the valid merge field, such as `Opportunity_LineItem_ProductName`. To create a complete list of the standard and custom fields available in your Salesforce organization, visit the Locate Record Field Names for Mail Merge article.
   f. Click **OK**.

Note: To list information about all products associated with an opportunity, insert the `Opportunity_LineItem_Start` merge field where you want to begin listing product information. Then, insert all the merge fields you want to include for each product on an opportunity. Finally, insert the `Opportunity_LineItem_End` to end the list.

8. Save your Word document.
9. Proceed to Uploading Mail Merge Templates to Salesforce on page 463.

Tip: For best results:

- Do not configure mail merge templates as "protected" or "restricted access" in Microsoft Word. Please refer to Word's help for information about protected Word documents. (In Word, press F1 to open help.)
- Do not connect mail merge templates to external data sources such as Excel worksheets or Access databases. Please refer to Word's help for information about restoring mail merge documents to what Word calls "normal Word documents."

SEE ALSO:

Mail Merge

Create Mail Merge Templates with Microsoft® Word

When Salesforce disables TLS 1.0, we're ending support for Connect for Office. Use the Connect for Office Word add-in, which provides a complete list of valid merge fields for you to insert.

EDITIONS

Available in: Salesforce Classic

Available in all editions

Important: When Salesforce disables TLS 1.0, we're ending support for Connect for Office. This change means that there's no guarantee that Connect for Office can establish a connection between Salesforce and Microsoft® Word or Excel. Even if sales reps can establish a connection, Salesforce no longer provides support or maintenance when there's an issue.

Important: Each mail merge field label you use must be unique.

1. Open Microsoft Word.
2.

If you use	You'll
Word 2003 or earlier	Select **Log In** from the **Salesforce** drop-down menu on the toolbar.
Word 2007	Open the Salesforce tab on the Ribbon, click the **Merge Fields** drop-drown menu, and then select **Log In**.

3. Enter your Salesforce username and password.
4. Click **Login**.

   Note: When you are successfully logged in and have an active session, the **Log In** command in the drop-down button is disabled. To log out, click **Log Out**.

5. Create your mail merge template from an existing or blank Word document.
6. Place your cursor where you want to insert a Salesforce merge field. To replace an existing merge field, select the entire merge field in your template. Mail merge fields must be unique.
7. In Word 2003 and earlier, select **Insert Merge Field** from the **Salesforce** drop-down menu. In Word 2007, click the **Merge Fields** drop-drown menu at the Salesforce tab on the Ribbon, and then select **Insert Merge Field**.

8. In the Insert Merge Fields dialog, select a field type and then select the merge field you want to insert. If you use products in Salesforce, see Including Opportunity Product Data in Mail Merge Templates on page 462.
9. Click **Insert** to add the merge field at your current cursor position in your Word document.
10. Insert additional merge fields as desired to build your mail merge template.
11. After your mail merge template is complete, upload it to Salesforce from Setup by entering `Mail Merge Templates` in the `Quick Find` box, then selecting **Mail Merge Templates**.

Including Opportunity Product Data in Mail Merge Templates

Products are available in Professional. Enterprise, Unlimited, Performance, and Developer Editions. To add opportunity product data to your mail merge template, in the Insert Merge Fields dialog select Opportunity Line Item Fields and then select the fields to insert. This inserts a table with the selected merge fields and special "start" and "end" fields. (You can download sample default mail merge templates which include a table of opportunity product data.) You can modify this table as needed, but the `Opportunity_LineItem_Start` merge field must be before all opportunity product merge fields and the `Opportunity_LineItem_End` merge field must be after all opportunity product merge fields. These start and end fields trigger Salesforce to list all of the products on the opportunity.

If you also want to insert product merge fields into the table of opportunity product merge fields, you can do so manually without using the Salesforce Word add-in:

1. In your Word document, place your cursor where you want to insert the merge field.
2. In Word 2003 and earlier, select **Insert** and then **Field** from the Word menu bar. In Word 2007, select the Insert tab on the Ribbon, click **Quick Parts** in the Text group, and then click **Field**.
3. Select **Mail Merge** in the Categories drop-down list.
4. Select **MergeField** in the Field names box.
5. In the Field name box in the Field Properties area, enter the merge field name manually, such as `Opportunity_LineItem_ProductName`.
6. Click **OK**.

Connect for Office System Requirements

When Salesforce disables TLS 1.0, we're ending support for Connect for Office.

EDITIONS

Available in: Salesforce Classic

Available in all editions

Important: When Salesforce disables TLS 1.0, we're ending support for Connect for Office. This change means that there's no guarantee that Connect for Office can establish a connection between Salesforce and Microsoft® Word or Excel. Even if sales reps can establish a connection, Salesforce no longer provides support or maintenance when there's an issue.

The system requirements for Connect for Office are:

- Microsoft® Office 2007
- Microsoft® Windows Vista® (32-bit only) - Until Salesforce disables TLS 1.0, when Windows Vista is no longer supported.

Uploading Mail Merge Templates to Salesforce

Administrators and users with the "Manage Public Templates" permission must upload completed Microsoft Word mail merge templates to Salesforce to make them available for use.

1. In Salesforce, from Setup, enter `Mail Merge Templates` in the `Quick Find` box, then select **Mail Merge Templates**.
2. Click **New Template**.
3. Enter a name and description for the template. This will help users correctly choose a template when generating mail merge documents.

   If your organization uses Extended Mail Merge, choose the appropriate document type: `Document`, `Label`, or `Envelope`.
4. Click **Browse** to select your Word mail merge template.
5. Click **Save** to finish.

SEE ALSO:

Mail Merge

EDITIONS

This feature is available in both Salesforce Classic

Available in all editions

USER PERMISSIONS

To upload mail merge templates:
- "Manage Public Templates"

To edit mail merge templates:
- "Manage Public Templates"

Using Letterheads

A letterhead defines the logo, page color, and text settings for your HTML email templates. For best results, create a single letterhead to use for all your HTML email templates. You can create letterheads and make them available organization-wide.

To use letterheads, from Setup, enter `Letterheads` in the `Quick Find` box, then select **Letterheads**.

From the Letterheads list page:

- To view a letterhead, select the name from the list.
- To edit a letterhead, click the name from the list and choose one of the edit options: **Edit Properties** or **Edit Letterhead**.
- To delete a letterhead, click **Del** next to the name. You cannot delete a letterhead that is used in any HTML email templates.

SEE ALSO:

Create a Letterhead

Letterhead Fields

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create or change letterheads:
- "Manage Letterheads"

Create a Letterhead

Letterheads define the look and feel of your HTML email templates. Your HTML email templates can inherit the logo, color, and text settings from a letterhead.

A letterhead consists of properties and details. The properties are only visible inside your organization; they help users identify a letterhead. The details are applied to an email when using that letterhead. Use the letterhead wizard to create both the properties and details of your letterhead.

1. From Setup, enter `Letterheads` in the `Quick Find` box, then select **Letterheads**.
2. Click **New Letterhead**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To create or change letterheads:
- "Manage Letterheads"

Setting Letterhead Properties

1. Check `Available For Use` if you would like users to be able to use the new letterhead immediately.
2. Enter a `Letterhead Label`. The label is used to refer to the letterhead on user interface pages.
3. If necessary, change the `Letterhead Unique Name`. This is a unique name used to refer to the component when using the Force.com API. In managed packages, this unique name prevents naming conflicts on 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 `Letterhead Unique Name` field, a developer can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.
4. Enter a description for this letterhead. The name and description fields are for internal use only to describe the letterhead to other users.
5. Click **Save**. The letterhead detail page appears.

Setting Letterhead Details

1. Set the attributes for the letterhead.
   - Click **Edit Background Color**, and enter a color for the background of your letterhead. Click the color picker button to choose a color.
   - Click **Edit Header Properties**, and select the color, alignment, and height for the top section of the letterhead.
   - Click **Select Logo** to include an image of your company logo in the top or bottom section of the letterhead.

     Note: You must upload the logo image to the Documents tab before you can add it to the letterhead. Make sure the document is marked as an `Externally Available Image` so it is visible to non-Salesforce users when it is received in an email. For more information, see "Upload and Replace Documents" in the Salesforce Help.

     To select an image, choose a folder, and click the document name to attach the document. Alternatively, click **Search in Documents**, and enter the file name to search for documents by name.
   - Click **Remove Logo** to delete the image from the letterhead.
   - Click **Edit Top Line**, and enter a color and height for a horizontal line below the header. Click the color picker button to choose a color.
   - Click **Edit Body Colors**, and enter the background color for the main body of your letterhead.
   - Click **Edit Middle Line**, and enter a color and height for the middle border in your letterhead. Click the color picker button to choose a color.
   - Click **Edit Footer Properties**, and select a color, alignment, and height for the bottom section of the letterhead.

- Click **Edit Bottom Line**, and select a color and height of a bottom horizontal line. Click the color picker button to choose a color.

2. Optionally, click **Preview** to display the letterhead in a separate browser window.
3. Click **Save**.

To create an HTML email template that contains the settings in your letterhead, see Create HTML Email Templates.

SEE ALSO:

Manage Email Templates

Create Custom HTML Email Templates

Letterhead Fields

Here is a description, in alphabetical order, of the fields that appear on the Letterhead Detail page.

Field	Description
`Available For Use`	Check mark that indicates the letterhead can be applied to an HTML template.
`Created By`	Name of the user who created the letterhead, including the date and time.
`Description`	Text that helps distinguish this letterhead from others.
`Letterhead Label`	Internal name to identify the letterhead.
`Letterhead Unique Name`	This is a unique name used to refer to the component when using the Force.com API. In managed packages, this unique name prevents naming conflicts on 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 `Letterhead Unique Name` field, a developer can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.
`Modified By`	Name of the user who last modified the letterhead, including the date and time.
`Namespace Prefix`	The namespace prefix used by the email template within the API.

SEE ALSO:

Create a Letterhead

Manage Email Templates

In Salesforce Classic, you can create four different types of email templates: text, HTML with letterhead, custom, and Visualforce. All of these email templates can include text, merge fields, and attached files. You can also include images on your HTML and Visualforce templates. You can use email templates when you send an email from the Activity History related list of a record. Text and HTML templates can also be used when you send mass email. A button to check the spelling of your template is available for text templates and Visualforce templates without HTML tags.

- **Text** - All users can create or change text email templates. See Create Text Email Templates on page 468.
- **HTML with letterhead** - Administrators and users with the "Edit HTML Templates" permission can create HTML email templates based on a letterhead. See Create HTML Email Templates.
- **Custom HTML** - Administrators and users with the "Edit HTML Templates" permission can create custom HTML email templates without using a letterhead. You must either know HTML or obtain the HTML code to insert in your email template. See Create Custom HTML Email Templates on page 470.
- **Visualforce** - Administrators and developers can create templates using Visualforce. Visualforce email templates allow for advanced merging with a recipient's data, where the content of a template can contain information from multiple records. See Create Visualforce Email Templates.

Note: You can't send a mass email using a Visualforce email template.

To access your email templates, 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.
- Click the name of any email template to go to the Viewing Email Templates page.
- To edit or delete a template, click **Edit** or **Del** next to the template name in the list.
- Click **New Template** to create any type of email template.

Note: Email templates used in the following features must be both public and active:

- Web-to-Lead
- Web-to-Case
- Email-to-Case or On-Demand Email-to-Case
- Assignment rules
- Escalation rules
- Auto-response rules

SEE ALSO:

Clone Email Templates

Using Letterheads

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 Visualforce email templates:
- "Customize Application"

To create or change public email template folders:
- "Manage Public Templates"

Viewing Email Templates

To view a template, click the template name in the list. The options vary depending on the template type (custom, HTML, Visualforce, or text):

- For text templates, click **Edit** to change the message content, subject, or merge fields.
- For custom and HTML templates:
  - Change the content or merge fields of the HTML version by clicking **Edit HTML Version**.

    Note: All custom and HTML email templates include a text-only version for recipients who can't view HTML emails. If you leave the text-only version blank, the text-only version is generated automatically when you edit the HTML version.
  - Change the content or merge fields of the text-only version by clicking **Edit Text Version**.

    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.
- For Visualforce templates:
  - Change the markup of the template page by clicking **Edit Template**.
  - The Visualforce Attachments related list indicates which attachments are being generated through Visualforce markup.
  - If the Visualforce markup references components in installed managed packages, the Version Settings related list shows the package versions of the installed packages containing the components. Some kinds of components in installed managed packages can include another class, a trigger, or a custom object.
  - 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.

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 Visualforce email templates:
- "Customize Application"

To create or change public email template folders:
- "Manage Public Templates"

- 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**.
- Click **Attach File** from the Attachments related list. The attached file is included in every email based on the template.

  To select a file:
  - To search for files in the Documents tab, click the **Search in Documents** link. If you select an image logo or other graphics file, mark the document `Externally Available` on the Documents tab.
  - Alternatively, select a file from your computer or from a document folder by choosing an option from the **File Location** drop-down list.
- If you have the "Manage Public Templates" permission, you can click **[Change]** next to the `Author` field to select a different author. By default, the author is the person who created the email template.
- Remove the template by clicking **Delete**.
- Clone a template by clicking **Clone**. For more information, see Clone Email Templates on page 471.
- If "Developer Mode" is enabled, see what components the template references by clicking **Show Dependencies** .

Create Text Email Templates

You can create plain-text email templates to send to recipients who can't read HTML email.

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 the Text template type, 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.
10. Enter a Subject for the message.
11. Enter the text of the message.
12. If desired, enter merge fields in the template subject and text body. When you send an email, these fields are replaced with information from your records.
13. 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**.

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 public email template folders:
- "Manage Public Templates"

Attach Files to Templates

To add an attachment to a 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. Select a template.
3. Click **Attach File** from the email template detail page.

4. Choose a folder and click the document name, or search for a document by clicking **Search in Documents** and entering the file name.

   Alternatively, click **My Computer** to attach a file from your computer.

The attached file is included in every email that uses the template. Attachments in mass emails are sent as links rather than as files (see Send Mass Email on page 393).

SEE ALSO:

Manage Email Templates

Using the Format Toolbar

Use the formatting toolbar to edit text in HTML. Select the text you wish to format and click the appropriate option described below:

Option	Description
Font	Choose a character style. Select the text you want applied to a font and then choose the appropriate font.
Size	Choose a character size. Select the text you want applied to the size and then choose the size.
	Insert a graphic from the documents library. This option is not available when doing some actions such as creating custom home page components.
	Choose a background color
	Choose a font color
	Make text bold
	Make text italic
	Underline text
	Insert a new hyperlink or edit an existing link. Select the text you want to link, click this button, and enter the URL for the link. To use a merge field such as `{!Case_Link}` as the destination of the link, insert the merge field after the **http://**.
	Left justify text
	Center text
	Right justify text
	Bullet a list
	Number a list
	Increase text indent
	Decrease text indent

Create Custom HTML Email 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.

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"

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:

Clone Email Templates

Clone Email Templates

Cloning an email template involves saving an existing email template with a new name.

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 name of an email template in the list.
3. Click **Clone**.
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. Enter a `Description` for the template. Both template name and the description are for your internal use only.
8. Click **Save**.

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 Visualforce email templates:
- "Customize Application"

To create or change public email template folders:
- "Manage Public Templates"

Adding Images to Email Templates

You can include images or logos on your HTML and Visualforce email templates. For HTML with letterhead templates, logos or images come from the letterhead you choose when creating the template.

When creating custom HTML or Visualforce templates, simply include `img` tags that reference the image. We recommend uploading the images to the Documents tab and referencing the copy of the image on the Salesforce server. For example, for HTML:

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 Visualforce email templates:
- "Customize Application"

To create or change public email template folders:
- "Manage Public Templates"

```
<img src="https://na2.salesforce.com/servlet/servlet.ImageServer?
id=015D0000000Dpwc&oid=00DD0000000FHaG&lastMod=1270576568000" alt="Company Logo"
height="64" width="64"/>
```

Visualforce example:

```
<apex:image id="Logo" value="https://na7.salesforce.com/servlet/servlet.ImageServer?
id=015D0000000Dpwc&oid=00DD0000000FHaG&lastMod=127057656800"
height="64" width="64"/>
```

Merge Fields for Cases

The list of available merge fields depends on the type of data that you're working with. Most of the merge fields for cases correspond directly with a case field. This table explains the more advanced merge fields that represent values derived from processing a case record.

EDITIONS

Available in: Salesforce Classic

The available merge fields vary according to which Salesforce edition you have.

Field	Merge Field	Description
Articles as PDFs	Case.Articles_as_PDFs	Articles associated with the case converted to PDF attachments. In the Emails related list on the case detail page, users can click **Send an Email** and choose a template containing this merge field. The attachments can be previewed or deleted before the email is sent.
Email Thread	Case.Email_Thread	A thread of all emails where the case contact is a sender or recipient (To, CC, or BCC). The emails are listed in reverse chronological order so the most recent emails appear at the top of the thread. The thread inserts the text version of the emails. You can't use this merge field in Visualforce pages. The limits for the email thread are: • Maximum number of emails: 200 • Email body truncation size: 32 KB
Last Case Comment	Case.Last_Case_Comment	The description of the most recent comment to be created on a case.
Solution Attachments	Case.Solution_Attachments	Attachments for the case solution..
Solution Description	Case.Solution_Description	The details of the solution associated with the case. If more than one solution is associated with the case, the description of each solution appears in a list..
Solution Subject	Case.Solution_Subject	The title of the solution associated with the case. If more than one solution is associated with the case, the title of each solution appears in a list.
Solution Subject and Description	Case.Solution_Subject_and_Description	The title and details of the solution associated with the case. If more than one solution is associated with the case, the title and description of each solution appears in a list.
Suggested Solutions	Case.Suggested_Solutions	Links to the subject and description of each suggested solution that may help customers solve their issues. Note: Sending mass emails using templates with the suggested solutions merge field can take several minutes and isn't recommended.
Case Thread Id	Case.Thread_Id	A unique identifier for the case email thread in Email-to-Case. The thread ID is the unique ID of each case email, such as [ref:_DV0Txx._500V0U9YB:ref]. By default, the thread ID is added to both the subject and body of case emails. The default location for the thread ID is at the end of the body. Use this merge field to position it elsewhere in the body.

Notes on Merge Fields for Cases

Merge fields for entitlements on cases

Merge fields for entitlements on cases aren't supported. For example, if you add the `Entitlement Name` `{!Case.Entitlement}` merge field to an email template, the field is not populated on the template.

Merge fields for Email-to-Case or On-Demand Email-to-Case

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. See Manage Email Templates on page 466.

Merge fields for Web-to-Case

To reference the name, email, phone, or company of the customer who submitted an online case with Web-to-Case, use the relevant `{!Case_OnlineCustomer...}` field. To reference the contact or account associated with a case, use the relevant contact or account merge fields.

Merge Fields for Communities

You can add merge fields to Communities email templates.

When you enable Salesforce Communities in your organization, three text-based email templates are created:

- Communities: Changed Password Email
- Communities: Forgot Password Email
- Communities: New Member Welcome Email

These templates use unique merge fields. These merge fields are not available to select and copy when editing a template, but you can enter them manually. These merge fields will only work properly if used in a text or HTML template selected for a community.

EDITIONS

Available in: Salesforce Classic

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

Field Name	Description
`{!Community_Name}`	The name of the community, as entered during community creation.
`{!Community_Url}`	The URL to the login page of a community. For instance, https://acme.force.com/partners/login. If this merge field is part of the welcome email being sent to a new external user, the URL is appended with a link to a reset password page. This field is populated only if: • The template containing this field is selected as the Welcome New Member template for a community, and Send welcome email is selected, OR • The template containing this field is selected as either the Forgot Password or Change Password template and the user receiving the email is an external user who is a member of the community.
`{!Receiving_User.Username}`	The user name of the user who will receive the welcome email.

You can create custom email templates for communities using Visualforce, which allows you to use custom company branding in your email templates. For Visualforce email template, use the `$Network` global merge field type and its properties, as described in this table.

Field Name	Description
`$Network.Name`	The name of the community, as entered during community creation.
`$Network.NetworkUrlForUserEmails`	The URL to the login page of a community. For instance, https://acme.force.com/partners/login. If this merge field is part of the welcome email being sent to a new external user, the URL is appended with a link to a reset password page. This field is populated only if it is used in a Visualforce email template for one of three email types supported for Communities.

If your community is using cases, approvals, or workflows, emails created from an email template that use the `{!<any_object>.Link}` or `{!Case.Link}` merge fields include a link to the record in the community. If the user receiving the email is a member of multiple active communities, the link goes to the oldest active community. If the user is already logged in to a community and clicks the link in the email, the link goes to that community. If the user is not a member of any community, the link goes to the internal organization. If the user is a member of a portal and a community, the link goes to the community.

Field Name	Description
`{!Case.Link}`	Used in: • Case comment notifications to contacts and owners • Case creation and update notifications to contacts
`{!<any_object>.Link}`	Used in: • Approval requests sent to approvers and delegated approvers • Workflow email alerts

To find out if your email templates use these merge fields, from Setup, enter *`Email Templates`* in the `Quick Find` box, then select **Email Templates**, then click **Edit** next to any email template.

SEE ALSO:

Manage Email Templates

Generate Mass Mail Merge Documents with Extended Mail Merge

Note: You can generate mail merge documents using the Extended Mail Merge feature. Extended Mail Merge is available by request only. Contact Salesforce Customer Support if you are interested in this feature.

In addition, your administrator must activate the feature before you can use Extended Mail Merge.

EDITIONS

This feature is available in both Salesforce Classic

Available in all editions

USER PERMISSIONS

To generate mass mail merge documents:

- "Manage Public Documents"

With Extended Mail Merge, you can easily generate mail merge Microsoft® Word documents—such as form letters with matching envelopes and address labels—for multiple records at the same time.

1. Click the accounts, contacts, or leads tab. Other kinds of records are not currently supported.
2. In the Tools area, click **Mass Mail Merge** to start the mass mail merge wizard.
3. Choose an appropriate list view from the `View` drop-down list.
4. Select the records to include in the mail merge. To select all records currently displayed on the page, select the checkbox in the column header.
5. Click **Next**.
6. Select the types of Word documents you'd like to generate. The supported document types are documents, envelopes, and labels.
7. Select the `Log an activity...` checkbox to log the generation of these mail merge documents by adding a completed task on each record.
8. Click **Next**.
9. Select the appropriate mail merge templates.

   For documents, choose whether to create one Word document that includes all output or a separate Word document for each record.
10. Optionally, click **Preview Template** to review the Word document with merge fields but without your data. Note that although you can edit the Word document that opens, those changes won't be applied to your current mail merge request. To make a newly revised template available for mail merge, it must be uploaded first.
11. Click **Finish**.

    Note: If your request exceeds the maximum size limit for Extended Mail Merge, you're prompted to select either fewer records or smaller templates.

Salesforce sends you an email when your generated documents are ready. When mail merge documents are:

- Under 3 MB, Salesforce sends them to your email as either Word document (`.doc`) or Zip file (`.zip`). attachments. If the attachment size exceeds your organization's maximum email attachment size, or your administrator has set all mail merge documents to be saved to the Documents tab, Salesforce automatically saves your generated documents to the Documents tab. You'll receive an email with a link to the document's location.
- Over 3 MB, Salesforce saves them to your personal documents folder on the Documents tab.

Mail Merge Considerations

Extended Mail Merge supports the following additional environments: the Mozilla Firefox Web browser and the Apple Mac OS. Furthermore, it doesn't require the installation of an ActiveX control.

Extended Mail Merge supports Microsoft Word 2007.

- Extended Mail Merge does not support templates saved in `.docx` or `.dotx` file formats.

- Mail merge documents give you access only to the fields that are accessible to you via your page layout and field-level security settings.
- Extended mail merge doesn't support formatting from rich text area fields.
- Using mail merge from a record detail page automatically triggers standard workflow and validation rules for that record. Using Extended Mail Merge, however, doesn't trigger those rules.
- With Extended Mail Merge, a mail merge operation can't exceed the following limits:
  - 1,000 records
  - The selected mail merge template(s) total size can't be larger than 1 MB.
  - For mass mail merges, the number of selected records multiplied by the combined sizes of the selected mail merge templates can't be larger than 50 MB.
- When you preview a mail merge document, you see only the template. The preview doesn't populate merge fields with your data because there's no record detail available to the preview template.

SEE ALSO:

Mail Merge

Send a Single Mail Merge Document

Send a Single Mail Merge Document

Create mail merge documents using fields supported objects.

EDITIONS

This feature is available in both Salesforce Classic

Available in all editions

Important: When Salesforce disables TLS 1.0, we're retiring support for standard Mail Merge. This change means that sales reps can no longer generate mail merge documents in Microsoft® Word. Even if reps are able to access the feature, Salesforce no longer provides support or maintenance when there is an issue. But don't worry! Reps can continue running mail merges with Salesforce data when you migrate them to Extended Mail Merge.

1. Click **Mail Merge** in the Activity History related list on the appropriate record. Accounts, contacts, leads, cases, opportunities, and custom objects are supported.
2. Use the lookup to specify the record from which information will be merged.
3. Select a mail merge template.
4. Click **Generate**.

   If the custom object has a master-detail relationship with opportunities, the primary contact for the opportunity is selected by default.
5. Salesforce then generates your document:
   - If your organization uses standard mail merge, Word opens with your generated document. When the document displays, choose **Save As** from the **File** menu to save the document to your hard drive.
   - If your organization uses Extended Mail Merge and your request exceeds the maximum size limit, you are prompted to select a smaller mail merge template. With Extended Mail Merge, Word does not open when you click **Generate**. Instead, Salesforce sends you an email that either includes your generated Word document as an attachment or provides a link to it on the Documents tab.
6. If you chose to log an activity for the mail merge, enter the task information, and optionally create a follow-up task.

   The `Subject` of the mail merge task is set to the mail merge template name by default, and the task is displayed as a completed activity in the Activity History related list. The merged document is not stored with the task.

7. Print and mail your document or send it as an email attachment.

Mail Merge Considerations

Extended Mail Merge supports the following additional environments: the Mozilla Firefox Web browser and the Apple Mac OS. Furthermore, it doesn't require the installation of an ActiveX control.

Extended Mail Merge supports Microsoft Word 2007.

- Extended Mail Merge does not support templates saved in `.docx` or `.dotx` file formats.
- Mail merge documents give you access only to the fields that are accessible to you via your page layout and field-level security settings.
- Extended mail merge doesn't support formatting from rich text area fields.
- Using mail merge from a record detail page automatically triggers standard workflow and validation rules for that record. Using Extended Mail Merge, however, doesn't trigger those rules.
- With Extended Mail Merge, a mail merge operation can't exceed the following limits:
  - 1,000 records
  - The selected mail merge template(s) total size can't be larger than 1 MB.
  - For mass mail merges, the number of selected records multiplied by the combined sizes of the selected mail merge templates can't be larger than 50 MB.
- When you preview a mail merge document, you see only the template. The preview doesn't populate merge fields with your data because there's no record detail available to the preview template.

SEE ALSO:

Mail Merge

Generate Mass Mail Merge Documents with Extended Mail Merge

Connect Offline

Force.com Connect Offline

With Force.com Connect Offline, work on your key deals anywhere, any time—totally unplugged.

Connect Offline is a client application that lets you access a subset of Salesforce records using the same browser-based interface as the online system but without an Internet connection. Use Connect Offline to view, edit, create, and delete accounts, activities, contacts, opportunities, leads, and custom object records (including relationship groups). You can also add and update products and schedules on opportunities.

The subset of Salesforce records accessible in Connect Offline is referred to as a *briefcase*. Administrators can create *briefcase configurations*, which are sets of parameters that determine the records available in the briefcases of users with a specific profile. Organizations can have multiple briefcase configurations and associate each with a different set of profiles to simultaneously suit the needs of various types of offline users. For example, one configuration might include leads and opportunities in the briefcases of users with a Sales Representative profile, while another configuration includes accounts and related opportunities in the briefcases of users with an Account Executive profile. Users without an assigned briefcase configuration can configure the settings for their own Connect Offline briefcase and can manually select the accounts the briefcase includes.

EDITIONS

Available in: Salesforce Classic

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

Available for an additional cost in: **Professional** Edition

When online, users can synchronize their Connect Offline briefcases with Salesforce. During synchronization, the changes to records in the briefcase are implemented in Salesforce, and vice-versa. This ensures that both Salesforce and Connect Offline have the most current records. If updates to a record in the briefcase conflict with updates to a record in Salesforce, Connect Offline displays the conflict resolution tool, which allows users to easily resolve the conflict.

To start using Connect Offline today, log into Salesforce and install the Connect Offline client application.

SEE ALSO:

- What is Your Default Connect Offline Briefcase Contents?
- Log in to Connect Offline
- Tabs Available in Connect Offline

Log in to Connect Offline

1. On your computer, click **Start** > **Programs** > **salesforce.com** > **Connect Offline**, or double-click the Connect Offline desktop icon.

   Important: The first time you log into Connect Offline, you must have an Internet connection.

2. Enter your Salesforce username and password.

   Note: If your organization restricts IP addresses, logins from untrusted IPs are blocked until they're activated. Salesforce automatically sends you an activation email that you can use to log in. The email contains a security token that you must add to the end of your password. For example, if your password is `mypassword`, and your security token is `XXXXXXXXXX`, you must enter `mypasswordXXXXXXXXXX` to log in.

3. Select the `Update tab names` checkbox if you want Connect Offline to reflect any changes to the names of fields, objects, and tabs in Salesforce since the last time you selected this option.

   Note: Salesforce automatically updates your tabs the first time you log in.

4. Select the `Synchronize my data` checkbox to synchronize your Connect Offline briefcase with Salesforce.
5. Click **Login**.

EDITIONS

Available in: Salesforce Classic

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

Available for an additional cost in: **Professional** Edition

USER PERMISSIONS

User Permissions Needed

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

Briefcase Configuration

Manage Connect Offline Briefcase Configurations

Connect Offline *briefcase configurations* are sets of parameters that determine the records available in the briefcases of both individual users as well as users with a specific profile. You can create multiple briefcase configurations and associate each with different users and profiles to simultaneously suit the needs of various types of offline users. For example, one configuration might include leads and opportunities for sales representatives, while another configuration includes accounts and related opportunities for account executives.

Users without assigned briefcase configurations see the default briefcase contents and can manually configure settings for their own Connect Offline briefcase; however, Salesforce recommends using briefcase configurations instead of allowing users to manually configure their own offline briefcases because briefcase configurations provide:

- Centralized configuration
- Synchronization with any custom object, as opposed to personal briefcase settings that only support custom objects related to accounts, contacts, opportunities, or leads
- The ability to define data sets with greater flexibility and filtering capabilities

To manage briefcase configurations for your organization, from Setup, enter `Offline Briefcase Configurations` in the `Quick Find` box, then select **Offline Briefcase Configurations**.

- To create a briefcase configuration, click **New Offline Briefcase Configuration**.
- To define a data set for an offline briefcase configuration, click the name of the briefcase configuration, then click **Edit** in the Data Sets related list.
- To make changes to a briefcase configuration, click **Edit**.
- To delete a briefcase configuration, click **Del**.
- To view details about a briefcase configuration, click its name.
- To clone a briefcase configuration, select the briefcase configuration you want to clone and click **Clone**.
- To activate a briefcase configuration, click **Edit** next to the configuration you want to activate, select `Active`, and click **Save**.
- To deactivate a briefcase configuration, click **Edit** next to the configuration you want to activate, deselect `Active`, and click **Save**.

> **Important:** If you deactivate an active briefcase configuration, users assigned to that configuration cannot synchronize their briefcases.

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 Connect Offline briefcase configurations:

- "View Setup and Configuration"

To create, change, or delete Connect Offline briefcase configurations:

- "Manage Mobile Configurations"

SEE ALSO:

What is Your Default Connect Offline Briefcase Contents?

Create an Offline Briefcase Configuration

1. From Setup, enter `Offline Briefcase Configurations` in the `Quick Find` box, then select **Offline Briefcase Configurations** to access the briefcase configurations list page.
2. Click **New Offline Briefcase Configuration**.
3. Enter a name for the briefcase configuration.
4. Select the `Active` checkbox if you want to activate the briefcase configuration immediately after you create it. The configuration does not work until you select this checkbox.
5. Enter a description for the briefcase configuration.
6. Select users and profiles from the `Available Members` box and click the **Add** arrow to assign them to the briefcase configuration. If you do not immediately see the user or profile you want to add, enter the profile name in the search box and click **Find**. You can assign each user or profile to only one briefcase configuration.

   If there are users and profiles in the `Assigned Members` box you do not want to assign to the briefcase configuration, select them and click the **Remove** arrow.

   Warning: If you remove a user or profile from an active briefcase configuration, those users can no longer synchronize their briefcases to that configuration. The next time the users synchronize, Connect Offline synchronizes their briefcases with the default briefcase content.

   When you assign profiles to a briefcase configuration, the configuration applies to all Connect Offline users with that profile and overrides users' personal briefcase configurations.
7. Click **Save**.
8. Also, you must create the data sets for this offline briefcase configuration to determine the data that members of the configuration receive in their briefcase.

Note that your offline briefcase configuration is not active until you select the `Active` checkbox. Also, you must create the data sets for this briefcase configuration to determine the records that users with this configuration can access in 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 create, change, or delete briefcase configurations:

- "Manage Mobile Configurations"

SEE ALSO:

Manage Connect Offline Briefcase Configurations

What is Your Default Connect Offline Briefcase Contents?

Define Connect Offline Data Sets

After you create a briefcase configuration, define its data sets to specify the records that users can access in Connect Offline if that briefcase configuration is assigned to their profile.

Data sets are the parameters in briefcase configurations that determine which records appear in the briefcases of users assigned to the briefcase configuration. Each data set pertains to records of a single object and is classified by the name of that object. For example, the Accounts data set only includes account records. Filters and limits within each data set let you further restrict the records the data set includes.

Data sets can have child data sets for records associated with a top-level (parent) data set. For example, if the first level of your hierarchy has an Accounts data set, you can add a Contacts child data set for all contact records related to the account records.

A single briefcase configuration can have multiple data sets for the same object and at different levels. For example, you can have an Events parent data set and an Events child data set under Leads.

To define the data sets for a briefcase configuration:

1. From Setup, enter `Offline Briefcase Configurations` in the `Quick Find` box, then select **Offline Briefcase Configurations**.
2. Click the name of the briefcase configuration that you want to modify.
3. In the Data Sets related list, click **Edit**.
4. From the Data Sets page, you can:
   - Add a data set.
   - Remove a data set by selecting the data set you want to remove and clicking **Remove**.
   - Edit a data set by selecting the data set you want to edit in the hierarchy. The right pane displays the filters for that data set.

   As you define and modify the data sets, Salesforce automatically saves your changes.
5. In the Test Data Size section, select a user and click **Estimate Data Size** to estimate the amount of data the data sets will synchronize to a user's briefcase. Larger data sets take longer to synchronize and consume more disk space on users' computers.

   Note: The `Select a user` field defaults to the name of the user currently logged in; however, it is important to test the data size for users who will actually be assigned to the briefcase configuration for which you are defining the data sets.

   When the test completes, the Test Data Size section provides data set size summary information, and the data set hierarchy at the top of the page displays the number of records generated by each data set and the size of each data set. Use these statistics to identify data sets that might require additional filtering criteria to reduce the size.

   The test statistics in the Test Data Size section do not automatically refresh if you edit the data sets. Click **Refresh Data Size** to update the test results.
6. Click **Done** when you are finished.

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 Connect Offline data sets:
- "View Setup and Configuration"

To create, change, or delete Connect Offline data sets:
- "Manage Mobile Configurations"

Adding Data Sets

To add a data set:

1. In the hierarchy, select **Data Sets** to create a parent data set, or select an existing data set to create a child data set.
2. Click **Add...**.

3. In the popup window, select the object for the records you want the data set to include. Salesforce lets you create parent data sets for all custom objects and the following standard objects:
   - Accounts
   - Contacts
   - Events
   - Leads
   - Opportunities
   - Products
   - Tasks
   - Users

   For child data sets, the popup window only lists objects that relate to the selected parent data set.

   Note: Salesforce automatically transfers parent records of objects if that type of parent record is anywhere in the data set, even if the parent object is not connected to the child object in the hierarchy.

4. Click **OK**. The data set you created appears in the hierarchy.
5. Optionally, use filters to restrict the records that a parent or child data set includes:
   a. Use the Filter by Record Ownership options to configure Salesforce to automatically synchronize records based on the owner of the record. The possible options are:
      - `All Records`: Salesforce automatically synchronizes all records the user can access.
      - `User's Records`: Salesforce automatically synchronizes all records the user owns.
      - `User's Team's Records`: Salesforce automatically synchronizes all records owned by the user and the user's subordinates in the role hierarchy.
      - `User's Account Team's Records`: Salesforce automatically synchronizes accounts for which the user is an account team member, but does not include accounts owned by the user.
      - `User's Opportunity Team's Records`: Salesforce automatically synchronizes opportunities for which the user is an opportunity team member, but does not include opportunities owned by the user.
      - `None (Search Only)`: Salesforce does not automatically synchronize any records for this data set.

      Salesforce only displays options that relate to the selected data set. For example, selecting an account data set displays the `User's Account Team's Records` option, while selecting an opportunity data set displays the `User's Opportunity Team's Records` option.

      If your offline needs for an object require a combination of the available record ownership filters, you can add the same object data set up to four times on the same hierarchy level. For example, a sales manager might want to synchronize his opportunities, opportunities owned by his subordinates, and opportunities for which he is an opportunity team member. In this case, you would add an opportunity data set and select `User's Team's Records`, then add a second opportunity data set at the same level in the hierarchy and select `User's Opportunity Team's Records`. Note that objects with only one ownership filter option cannot be added multiple times at the same level of the hierarchy.

   b. Set the filter criteria to automatically synchronize only records that meet specific criteria in addition to the Filter by Record Ownership option you selected. For example, you can set the filter to only include opportunity records with amounts greater than $50,000, or contact records with the title "Buyer." Several $User global variables are available in offline configuration filters.

      Click **Add Filter Logic** to change the default AND relationship between each filter.

c. To prevent a single data set from consuming a large amount of memory, select the second radio button under Set Max Record Limit and enter the maximum number of records this data set can transfer to a briefcase. Use the Order By and Sort drop-down lists to specify which records are synchronized if the number of records available is higher than the limit you set.

If the limit is reached, Salesforce synchronizes records in accordance with the Order By and Sort settings. For example, if the settings are Last Modified Date and Descending, Salesforce transfers the most recently modified records and removes the same number of records that were least recently modified.

If you selected the `None (Search Only)` Filter by Record Ownership option, the limit you set does not apply because no records are automatically synchronized.

Tip: Do not use Set Max Record Limit in place of filters. Only use Set Max Record Limit as a safety mechanism, and use filters as the primary means of limiting the number of records in the briefcase. This ensures that your Connect Offline users receive the correct records.

6. Click **Done** when you are finished.

Notes on Data Sets

- Connect Offline users can view opportunity contact roles in their briefcases. To add contact roles to a briefcase, include the contact data set as a child of the opportunity data set in your briefcase configuration.
- Recurring events are not available in Connect Offline.
- Each data set can synchronize a maximum of 5,000 records.
- If you add a custom object containing a custom tab icon to a data set, the look and feel of the custom tab defaults to the Star tab style in Connect Offline.
- Connect Offline does not support the Force.com app menu. If your briefcase configuration synchronizes custom objects, all the tabs for those custom objects are visible when you log into Connect Offline, even if they belong to different apps.

SEE ALSO:

Manage Connect Offline Briefcase Configurations

Add Accounts to Your Connect Offline Briefcase Manually

If an administrator doesn't assign a briefcase configuration to your profile, click the **Include Offline** button on any account detail page to manually add the account to your Connect Offline briefcase.

The next time you synchronize your briefcase, Salesforce transfers the account to Connect Offline, as well as:

- All contacts associated with the account, if you have at least read access to the contacts
- All opportunities associated with the account, if you have at least read access to the opportunities. This includes opportunities that have been shared with you, that are owned by users below you in the role hierarchy, or where you are on the opportunity team. Products and schedules for downloaded opportunities are also included.
- All the custom objects that have a master-detail relationship with the account
- Tasks and events related to the included account, according to these guidelines:
  - Events dated this month, the past two months, or up to 24 months in the future
  - All open tasks up to 24 months in the future
  - Closed tasks with a due date this month, the past two months, or 24 months in the future

EDITIONS

Available in: Salesforce Classic

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

Available for an additional cost in: **Professional** Edition

USER PERMISSIONS

To manually add accounts to Connect Offline:
- "View" on accounts

- Tasks with a blank due date that were created or modified this month or within the past two months

You can manually add up to 100 accounts in your briefcase.

Note: The **Include Offline** button automatically appears on the account detail page for all Connect Offline users assigned to profiles without any briefcase configurations. You do not need to add the **Include Offline** button to account page layouts.

Removing Manually-Added Accounts from Connect Offline

You can remove manually added accounts from your briefcase as follows:

1. From your personal settings, enter `Connect Offline` in the `Quick Find` box, then select **Force.com Connect Offline**.
2. Click **Briefcase Setup**.
3. Select the checkbox next to the account to remove.
4. Click **Remove from Briefcase**.

The next time you synchronize your briefcase, Salesforce removes the account from your briefcase, as well as its related contacts, opportunities, and activities, and custom object records that have a master-detail relationship with the account.

What is Your Default Connect Offline Briefcase Contents?

EDITIONS

Available in: Salesforce Classic

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

Available for an additional cost in: **Professional** Edition

If your user profile does not have an associated briefcase configuration, your default briefcase automatically includes the following:

- All of your contacts (including your private contacts) and read access to related accounts or opportunities
- All contacts associated with the accounts in your briefcase, if you have at least read access to the contacts
- All opportunities associated with the accounts in your briefcase that are either open or have a close date in the current month, the past two months, or up to 24 months in the future if you have at least read access to the opportunities. This includes opportunities that have been shared with you, that are owned by users below you in the role hierarchy, or where you are on the opportunity team. Products and schedules for downloaded opportunities are also included.
- All of your leads up to a maximum of 5000
- All custom object records that have a master-detail relationship with any account, contact, or opportunity that is included in your briefcase
- Your tasks and events, as well as tasks and events related to the accounts in your briefcase, according to these guidelines:
  - Events dated the past two months or up to 24 months in the future
  - All of your open tasks up to 24 months in the future
  - Closed tasks with a due date the past two months or up to 24 months in the future
  - Tasks with a blank due date that were created or modified this month or within the past two months

  Note: For tasks and events that are related to custom objects not available offline, the `Related To` field on the activity indicates that the record is not available in Connect Offline.

If your user profile does not have an associated briefcase configuration, your default briefcase also includes all accounts associated with opportunities you own; however, you can change the account selection in your briefcase to include one of the following options instead:

- Accounts that you manually include
- Accounts related to the activities in your briefcase

- All your accounts

To edit your account selections, edit **Briefcase Setup**.

SEE ALSO:

Tabs Available in Connect Offline

Troubleshoot Connect Offline

Change Your Connect Offline Briefcase Account Selection

EDITIONS

Available in: Salesforce Classic

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

Available for an additional cost in: **Professional** Edition

If an administrator does not assign a briefcase configuration to your profile, your briefcase contains the default briefcase contents, which includes accounts that are associated with opportunities you own, accounts that you manually include, and accounts related to your contacts. To change the selection of accounts in your Connect Offline briefcase:

1. From your personal settings, enter `Connect Offline` in the `Quick Find` box, then select **Connect Offline**.
2. Click **Briefcase Setup**.
3. Click **Edit** next to Briefcase Settings.
4. Choose one of the following options to specify the accounts you want to include in your briefcase:
   - Manually selected — Up to 100 accounts that you manually include by clicking the **Include Offline** button on the account detail page, and accounts related to your contacts.
   - Opportunity-based briefcase — Up to 5000 accounts that are associated with opportunities you own (in addition to accounts that you manually include and accounts related to your contacts). The following restrictions apply:
     - You must have at least read access to the account.
     - The opportunity must be open or have a close date in the past two months or up to 24 months in the future.

     Opportunity-based briefcase is the default briefcase configuration.
   - Activity-based briefcase — Up to 5000 accounts related to the activities in your briefcase (in addition to accounts that you manually include and accounts related to your contacts).
   - All my accounts — Up to 5000 accounts you own or where you are on the account team (in addition to accounts that you manually include and accounts related to your contacts).
5. Click **Save**.

Important: If an administrator assigns a briefcase configuration to your profile after you change the selection of accounts in your briefcase, the assigned briefcase configuration overrides your briefcase account selection the next time you synchronize Connect Offline.

SEE ALSO:

Log in to Connect Offline

Synchronize Your Briefcase

When using Connect Offline with an Internet connection, you can synchronize your briefcase with Salesforce. During synchronization, Connect Offline updates Salesforce to reflect any changes you made to your briefcase records while offline. Connect Offline also updates your briefcase records to reflect any changes in Salesforce since your last synchronization. This ensures that both Salesforce and Connect Offline have the most current records.

Your briefcase automatically synchronizes the first time you log into Connect Offline. When you are using Connect Offline with an Internet connection, you can synchronize your briefcase anytime by clicking **Synchronize Briefcase** in the upper right corner of the browser window.

Data conflicts can occur during synchronization if a user modified an online record that you also modified offline. If updates to a record in your briefcase conflict with updates to a record in Salesforce, Connect Offline displays the Conflict Resolution tool, which allows you to easily resolve the conflicts. If you do not want to resolve the conflicts at that time, click **Cancel** to exit the Conflict Resolution tool. You can return to the Conflict Resolution tool later by clicking the link in the Errors section of the Connect Offline Home tab.

EDITIONS

Available in: Salesforce Classic

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

Available for an additional cost in: **Professional** Edition

Emptying Your Briefcase

The **Empty Briefcase** link in the upper right corner of the browser window resets Connect Offline to its initial state.

Warning: If you click the **Empty Briefcase** link, Connect Offline deletes all of your briefcase files and settings. Only empty your briefcase if you change the time zone on your computer or if your administrator requests you to do so.

Resolve Connect Offline Conflicts

When you synchronize, data conflicts occur if a user modified the same record in Salesforce that you modified in Connect Offline. For example, a conflict occurs if you change a contact's phone number in Connect Offline and another user changes that contact's address in Salesforce before you synchronize.

When a conflict occurs, Connect Offline displays a conflict resolution tool that enables you to resolve the conflict by identifying the most recent and correct values. The left side of the window displays a list of the records that have data conflicts, while the right side of the dialog box displays the fields that have conflicting data for the record you select in the left side.

To use the conflict resolution tool:

1. In the left pane, use the drop-down list to choose whether to display records in a tree or list view, then choose the record that you want to resolve.
2. In the right pane, use the drop-down list to choose whether to display all fields on the record or only those that have conflicting data, then select the radio button next to the correct value.
3. If necessary, click the pencil icon ( ) and manually enter the value you want to save.

   Note: The pencil icon is not available for read-only fields on some objects, such as products on opportunities.

4. Repeat these steps for each record listed in the left pane. When you have selected a value to resolve the conflict, the status of the record in the left pane displays a green check.
5. Click **Submit** when you have finished making selections for all records in conflict.

When working with the conflict resolution tool, note the following:

- If you choose not to resolve your data conflicts at this time, click **Cancel**. You can continue to work in Connect Offline, but the conflict resolution tool displays whenever you synchronize your data.
- Connect Offline lets you enter values that violate validation rules; however, such validation rule violations appear as data conflicts in the conflict resolution tool.

  The conflict resolution tool displays only one violation at a time. If a record violates multiple validation rules, resolve and synchronize each violation separately.

- The field values on some objects, such as products on opportunities, are read only in the conflict resolution tool; however, you can change these values as follows:

  1. Switch to the tree view in the left pane.
  2. Select the deepest branch after expanding all the branches.
  3. Choose the `Your Values` radio buton to save the Connect Offline values, or the `Salesforce Values` radio button to save the ones on the server instead. The values of the read-only fields change accordingly.
  4. Click **Submit**.

     If you click **Submit** without choosing an option, Connect Offline stores the value on the client for any read-only values in conflict resolution.

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

Tabs Available in Connect Offline

A subset of tabs and features are available in Connect Offline.

The tabs you see may differ if your administrator renames any Salesforce standard tab names or adds custom objects to your briefcase configuration.

EDITIONS

Available in: Salesforce Classic

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

Available for an additional cost in: **Professional** Edition

Home Tab

- View, create, modify, or delete your events and tasks except multi-person events
- Update or empty your briefcase contents
- Synchronize, search, and view recent items in the sidebar
- Expand the Briefcase Info section to see the number of records you have in Connect Offline for each object, and the number of records that you have modified since your last synchronization.

  Note: The list of modified records in Briefcase Info does not include deleted records. Also, search results do not include long text area fields like account **Description**.

- Click the icons below the calendar to display different views of activities
- To launch the Conflict Resolution tool, click the "You have conflicts to resolve" link when it displays in the sidebar.

Accounts Tab

- View your recent accounts on the accounts home page
- Select a standard list view to list the offline accounts
- View, create, modify, or delete accounts
- View, create, modify, or delete person accounts. This feature is available in Connect Offline version 3.5.2.13 or later.
- View, create, modify, or delete custom objects associated with offline accounts
- Link contacts, opportunities, and activities to offline accounts
- Use your organization's record types, dynamic page layouts, field-level security, and translated values (as defined in the Translation Workbench)
- Update records to which you have edit access. Your Briefcase may include some records that are read only depending on the records' sharing settings.

Relationship Groups Tab

- Track the familial and professional roles of different relationship group members
- Assign primary and secondary designations to the two most important members of a relationship group
- View roll-up related lists of all activities for the members of a relationship group
- View roll-up related lists of the custom objects that are related to the accounts in a relationship group

Note: This feature is available in Connect Offline version 3.5.2.13 or later. Related lists on the relationship group detail page are not available in Connect Offline.

Contacts Tab

- View your recent contacts on the contacts home page
- Select a standard list view to list the offline contacts

- View, create, modify, clone, or delete contacts
- View, create, modify, or delete custom objects associated with offline contacts
- Link activities to offline contacts
- Use your organization's record types, dynamic page layouts, field-level security, and translated values (as defined in the Translation Workbench)
- Update records to which you have edit access. Your briefcase may include some records that are read only depending on the records' sharing settings.

Opportunities Tab

- View your recent opportunities on the opportunities home page
- Select a standard list view to list the offline opportunities
- View, create, modify, clone or delete opportunities
- View, create, modify, or delete custom objects associated with offline opportunities
- Associate activities and contact roles to offline opportunities
- Add and update contact roles, products, and schedules, and change the price book for an opportunity
- Use your organization's record types, dynamic page layouts, field-level security, and translated values (as defined in the Translation Workbench)
- Update records to which you have edit access. Your briefcase may include some records that are read only depending on the records' sharing settings.

Leads Tab

- View your recent leads on the leads home page
- Select a standard list view to list the offline leads
- View, create, modify, or delete leads depending on sharing settings

  Note: Changes made to leads in Connect Offline do not trigger assignment rules.

- Link activities to offline leads
- Use record types, dynamic page layouts, field-level security, and translated values (as defined in the Translation Workbench)

Note: Leads and custom object records are only available in Connect Offline 2.0 and later, which is indicated by the briefcase icon you use to launch the application.

Notes on Working with Connect Offline

Consider the following when using Connect Offline:

- Multi-person events are visible in Connect Offline but you can't create or edit them. If you have been invited to an event, but are not the organizer, you can'tmodify or delete that event offline.
- Automatically generated fields such as formula fields and auto-number fields are not available in Connect Offline.

- Related lists in Connect Offline do not display lookup fields.

SEE ALSO:

What is Your Default Connect Offline Briefcase Contents?

Log in to Connect Offline

Troubleshoot Connect Offline

Troubleshoot Connect Offline

Review the following common situations and solutions to troubleshoot Connect Offline issues.

EDITIONS

Available in: Salesforce Classic

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

Available for an additional cost in: **Professional** Edition

Activities

Unable to edit the record associated with an activity offline

While you may be able to change the record associated with a task or event in Salesforce, the `Related To` field on an activity is only available in Connect Offline when the related record is available offline. For example, if an event is associated with an account that is not in your Briefcase, you will not be able to change the account on the event using Connect Offline.

`Visible in Self-Service` field is not available offline

While you may see this field in your activity page layouts using Salesforce, it is not visible from Connect Offline because the field indicates if an activity is associated with a case and cases are not available in Connect Offline.

Unable to update group events in Connect Offline

Multi-person events are visible in Connect Offline but you can't create or edit them. If you have been invited to an event, but are not the organizer, you can'tmodify or delete that event offline.

Briefcase Contents

Unable to edit some records in my briefcase

Depending on your briefcase settings, records are read only if they are available offline only because they are associated with records that are included offline due to your briefcase settings. For example, if you have selected an opportunity-based briefcase, some accounts will be read only offline even though they are not related to an opportunity, but because they are related to a contact in your briefcase.

Briefcase exceeds limit

Read only records that are included by association with other records in your briefcase do not count toward your limits. For example, the maximum number of accounts you can include is 5000 but your briefcase may contain 5200 if you have 200 accounts included because they are related to other records in your briefcase.

Browsers

Windows XP SP2 displays a warning banner in Connect Offline

To prevent the warning banner from displaying, modify your Internet Explorer settings as follows:

1. Launch Internet Explorer.
2. Click the **Tools** menu and choose **Internet Options**.
3. Select the **Advanced** tab.
4. Locate the Security section.

5. Enable `Allow active content to run in files on My Computer`.
6. Click **Apply**.
7. Click **OK**.

Unable to download and install Connect Offline using Firefox

Although other browsers are supported in Salesforce, you must use Internet Explorer to download and install Connect Offline.

Receiving error that says "A connection with Salesforce could not be established to update your Connect Offline."

This message can appear in the following scenarios:

- Your computer is configured to use a proxy server to connect to the Internet that requires authentication. This connection is made automatically using Single Sign-On or another manner to authenticate where you do not have to enter a username or password to connect to the Internet.
- Your computer is behind a firewall
- Your computer is actively running antivirus software

Conflict Resolution

Unable to choose fields in conflict resolution

The field values on some objects, such as products on opportunities, are read only in the conflict resolution tool; however, you can change these values as follows:

1. Switch to the tree view in the left pane.
2. Select the deepest branch after expanding all the branches.
3. Choose the `Your Values` radio buton to save the Connect Offline values, or the `Salesforce Values` radio button to save the ones on the server instead. The values of the read-only fields change accordingly.
4. Click **Submit**.

   If you click **Submit** without choosing an option, Connect Offline stores the value on the client for any read-only values in conflict resolution.

Conflict resolution prompts me to create a new record or retry

Your sharing settings may have changed. If you have access to perform the action, click **Retry**. Otherwise, create a new record in Connect Offline.

Cannot change value of dependent picklist in conflict resolution tool

When resolving conflicts for a dependent picklist field, you cannot change the picklist value of the conflicting field. To resolve these types of conflicts, select whether to apply the Salesforce value or the Connect Offline value.

Note: In offline mode, if a dependent picklist's controlling field is hidden by field-level security, the information icon for the dependent picklist displays the controlling field's API name rather than the label name.

Fields

Unable to see lookup fields in Connect Offline related lists

Related lists in Connect Offline do not display lookup fields.

Unable to see custom formula fields and auto-numbers in Connect Offline

Automatically generated fields such as formula fields and auto-number fields are not available in Connect Offline.

Auto-number fields do not generate in Connect Offline

When you create a record in Connect Offline that increments an auto-number field, Connect Offline displays a label for that field while you are using Connect Offline. When you synchronize, Salesforce inserts the next unique number in the field.

Home Tab

Record count is wrong in Home tab list of modified records

In the sidebar, the list of modified records in briefcase Info does not include deleted records.

Installation

What gets installed?

Connect Offline installs SForceDB.exe, which runs continuously in the background and hosts the Connect Offline database.

Unable to install Connect Offline

Connect Offline requires Salesforce to install components that edit the registry on your computer. If your organization imposes security that prevents you from editing the registry, log in as the administrator of your machine before installing these components or contact your IT department for assistance.

Can I do mass deployments of Connect Offline?

Yes, you can perform system-wide deployments.

How can I tell what Connect Offline version my users have?

Each user's Connect Offline version is listed in the Login History.

Leads

Unable to see leads in Connect Offline

Leads are only available in Connect Offline 2.0 and later. If you are using Connect Offline 2.0 or later, you will launch the application using this icon: . To upgrade Connect Offline:

1. Synchronize your data in Connect Offline.
2. Optionally, remove the previous installation of Connect Offline using Add/Remove Programs in the Windows Control Panel.
3. Install Connect Offline. by going to the Connect Offline page in your personal settings.
4. Synchronize your data in Connect Offline.

Check to make sure you have the appropriate user permissions to view leads.

Lead assignment rules do not appear to be working

Leads created in Connect Offline will not be automatically assigned based on lead assignment rules. Once connected to Salesforce again, assign them by doing a mass transfer of records.

Multicurrency Display Differences

Opportunity amounts display a fractional difference

If your organization has enabled multicurrency, and the currency used for an opportunity is different from the corporate currency, a small display difference may be observed. The converted amount you see in the offline opportunity detail page may be off by a cent or two as compared to the same page in the Salesforce application. There is no error in the actual stored value.

Relationship Groups

Unable to see the Relationship Groups tab in Connect Offline

The Relationship Groups tab is only available if the Relationship Groups AppExchange package is installed in the Salesforce organization with which you synchronize Connect Offline.

Search

Search results are missing fields

Search results do not include long text area fields such as account `Description`.

Timeouts, Timestamps, and Time Zones

The timestamps of files updated in Connect Offline do not appear as expected

For records that you create or update in Connect Offline, the `Created By` and `Modified By` fields reflect the time on your PC, even after synchronization.

Activities that you create in Connect Offline reflect the time you enter and the time zone of your PC. During synchronization, Salesforce converts the activity times to the time zone set in your Salesforce personal information.

If you change the time zone on your computer, empty and synchronize your briefcase to reflect the change in Connect Offline.

Connect Offline times out when synchronizing large data sets

Edit the `HttpTimeout` registry setting in `HKEY_LOCAL_MACHINE\SOFTWARE\salesforce.com\Offline2`. The default is 360 seconds.

Edit Stay-in-Touch Settings

To set your preferences for requesting contact information updates:

EDITIONS

Available in: Salesforce Classic

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

Note: If your organization uses person accounts, person accounts are also affected by these settings. For more information, see What Is a Person Account? on page 3.

1. From your personal settings, enter *`Stay-in-Touch`* in the `Quick Find` box, then select **My Stay-in-Touch Settings**.
2. Choose Yes for `Automatic Bcc` to receive copies of your sent Stay-in-Touch emails. This option is only available if your organization has not enabled compliance BCC emails.
3. Enable the reminder if you would like to be prompted to send a Stay-in-Touch request whenever you save a new contact.
4. Enter a default subject for the email.
5. In the note area, enter a message to the recipient.
6. In the signature area, enter a signature with your contact information.
7. Use the merge fields area at the top of the page to display available merge field values, which you can copy and paste into the subject, note, or signature boxes as needed.
8. Click **Save**.

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