

Get Started with Salesforce

Salesforce, Spring '17





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Help for this feature is currently not available. Please contact Salesforce for assistance.

GET STARTED WITH SALESFORCE

Welcome to Salesforce, the award-winning cloud computing service designed to help you manage your customer relationships, integrate with other systems, and build your own applications! Here are some key concepts to help you understand the Salesforce products and editions and guide you through common tasks in Salesforce.

What is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Log In, Navigate, and Search Salesforce

New to Salesforce? Learn how to navigate, customize, and manage basic CRM features.

Verify Your Identity

Use identity verification tools to secure and protect your data from unauthorized access.

Personalize Your Salesforce Experience

Update your personal information, for example your email address. Change your password and security question. If you have administrator permissions, you can also customize your Salesforce org.

Work on Mobile Devices

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

What is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

But standard products and features are only the beginning. With our platform you can customize and personalize the experience for your customers, partners, and employees and easily extend beyond out of the box functionality.

Concepts, Products, and Services

As you get started with Salesforce, it's helpful to learn some key concepts and terms. They come up frequently when you interact with the product, our documentation, and our service professionals. The concepts and terms here help you understand how Salesforce works.

The Salesforce Admin

The Salesforce administrator—or "admin" is a Salesforce user with system administration duties and other super powers. Admins are responsible for setting up Salesforce for their organizations and making sure it runs smoothly.

Salesforce Editions

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

EDITIONS

Available in: Salesforce Classic

Available in all editions

EDITIONS

Available in: both Lightning Experience and Salesforce Classic

Your Salesforce edition determines which features and functionality you can access.

EDITIONS

Available in: Salesforce

Supported Browsers, Languages, and Accessibility Standards

Learn about the browsers, languages, and accessibility standards that Salesforce supports.

Additional Resources

Looking for more resources? Check out our tip sheets, implementation guides, videos, and walkthroughs.

Concepts, Products, and Services

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Concepts

Concept

Cloud

	Classic
	Available in: All Editions
Definition	
A Salesforce name for a loose federation of features that help you accomplish certain types activities, such as selling products or supporting your customers. Two common examples are <i>Service Cloud</i> and <i>Sales Cloud</i> .	

Cloud Computing	Technology that enables Internet-based services that let you sign up and log in through a browser. Salesforce delivers its service in the cloud. Other familiar cloud computing services include Google Apps and Amazon.com.
Software as a Service (SaaS)	Software delivered not by traditional means (such as on disk) but in the cloud, as a service. There's nothing to download or install, and updates are automatic.
Trust	A Salesforce term for its company-wide commitment to building and delivering the most secure, fast, and reliable cloud-based service available.
	trust.salesforce.com is a systems status website that provides Salesforce customers and the community access to real-time and historical system performance information and updates. It also lists incident reports and maintenance schedules across all its key system components.
	trust.salesforce.com is free to all members of the Salesforce

community.

Products and Services

Salesforce includes the following products and services.

Salesforce Applications

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

Force.com Platform

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

AppExchange

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

Salesforce.com Community

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

Terms

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

The Salesforce Admin

The Salesforce administrator—or "admin" is a Salesforce user with system administration duties and other super powers. Admins are responsible for setting up Salesforce for their organizations and making sure it runs smoothly.

Admins have special permissions. For example, they can add user accounts and specify what people can see and do in Salesforce. Admins can create custom Salesforce objects, workflows, validation rules, reports, and more. Admins are planners, problem-solvers, and heroes. All Salesforce organizations have at least one administrator. Your administrator's role can be as simple or as complex as your company's size and structure. In smaller organizations, the admin is often someone who also uses Salesforce the way other users do: to sell products or provide customer service, for example.

Salesforce offers lots of features and items that you can set up and configure yourself. For some things, though, partner with your trusty admin to help you get the best of what Salesforce has to offer.

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

- Find or use an object, field, or feature you heard about during training.
- Create a custom workflow that lets you find out when a case is closed.
- Create a custom approval process that allows you to sign off on employee expenses.
- Create a custom report for your sales region.
- Give you a user permission that's not granted as part of your user profile.
- Answer questions about your own or others' access to records.
- Address those cursed error messages that ask you to contact your administrator for help or more information.

How you contact your administrator, and when and why, depends on your company's internal business policies and practices.

Salesforce Editions

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

These bundles, called *editions*, share a look and feel but vary by feature, functionality, and pricing. For example, Enterprise Territory Management is available in Enterprise and Unlimited Edition orgs with the Sales Cloud, but not in Professional Edition orgs. Some customers start with a basic edition and upgrade as they grow their businesses.

The Salesforce Help describes all generally available features, including those that aren't available in all editions. To find out whether a feature is available in your edition, search for the feature in the Salesforce Help, and then read the "Available in:" table at the top of any topic about the feature.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Professional Edition

This edition is designed for businesses who need full-featured CRM functionality. Professional Edition includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment.

Enterprise Edition

This edition is designed to meet the needs of large and complex businesses. Enterprise Edition orgs get advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to the web services API, so you can easily integrate with back-office systems.

Unlimited Edition

This edition is Salesforce's solution for maximizing your success and extending that success across the entire enterprise through the Force.com platform. Unlimited Edition customers benefit from new levels of platform flexibility for managing and sharing all their information on demand. Unlimited Edition includes all Enterprise Edition functionality plus Premier Support, full mobile access, unlimited custom apps, increased storage limits, and more.

Developer Edition

This edition provides access to the Force.com platform and API. A Developer Edition org allows developers to extend the Salesforce system, integrate with other applications, and develop new tools and applications. Developer Edition provides access to many of the features available in Enterprise Edition orgs.

Note: Salesforce doesn't provide technical support for Developer Edition orgs. You can solicit help from the developer community message boards available to registered users via the Force.com developer website: developer.salesforce.com. Documentation for Developer Edition is available from the Technical Library.

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

Salesforce Editions That Are No Longer Sold

Some Salesforce editions are no longer sold. You can continue to use your Contact Manager, Group, Personal, Performance, or Database.com Edition org or purchase one of the editions that are currently sold: Professional, Enterprise, Unlimited, and Developer Editions.

Salesforce Editions That Are No Longer Sold

Some Salesforce editions are no longer sold. You can continue to use your Contact Manager, Group, Personal, Performance, or Database.com Edition org or purchase one of the editions that are currently sold: Professional, Enterprise, Unlimited, and Developer Editions.

Note: Lightning Experience isn't available in Contact Manager, Personal, or Database.com Edition orgs.

EDITIONS

Available in: **Contact Manager**, **Group**, **Personal**, **Performance**, and **Database.com** Editions

Contact Manager Edition

This edition is designed for small businesses and provides access to key contact management features including accounts, contacts, activities, calendars, notes and attachments, and reports. Contact Manager provides straightforward, easy-to-use customization options.

Group Edition

This edition is designed for small businesses and work groups with a limited number of users. Group Edition users can manage their customers from the start of the sales cycle through the end and provide customer support and service. Group Edition offers access to accounts, contacts, opportunities, leads, cases, dashboards (read only), and reports.

Personal Edition

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

Note: Personal Edition orgs purchased after June 2009 don't have access to opportunities.

Performance Edition

This edition is designed for customers who want to drive growth, increase customer satisfaction, and maximize sales and service success in the social and mobile world. Performance Edition orgs include all Unlimited Edition functionality plus clean, targeted lead and customer data from Data.com, coaching and feedback tools from Work.com, trusted identity services from Identity, and more. For customers in Japan, Singapore, and South Korea, we offer Performance Edition Limited, which includes all Performance Edition functionality except Data.com.

Database.com

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

As a Salesforce customer, you already use Database.com when you create custom objects, manage security, or import data with the Force.com platform and API. A stand-alone version of Database.com is available for developers who want to create applications that harness other languages, platforms, and devices.

We don't provide Database.com-specific documentation. Refer to the Salesforce documentation and the list of features that Database.com supports. This list identifies the Salesforce documentation subjects that apply to Database.com. Also, every feature's Edition Table includes Database.com if the feature is available in Database.com. Use the Salesforce Help, release notes, workbooks, and developer guides for APIs, Apex, SOQL, and SOSL.

Supported Browsers, Languages, and Accessibility Standards

Learn about the browsers, languages, and accessibility standards that Salesforce supports.

Supported Browsers

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

Supported Languages

Salesforce offers three levels of language support: fully supported languages, end-user languages, and platform-only languages.

Accessibility Standards

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

Supported Browsers

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

Supported Browsers for Salesforce Classic

Salesforce Classic is supported with Microsoft[®] Internet Explorer[®] version 9, 10, and 11, Apple[®] Safari[®] version 8.x, 9.x, and 10.x on macOS, and Microsoft Edge for Windows[®] 10. The most recent stable versions of Mozilla[®] Firefox[®] and Google Chrome[™] are also supported. There are some limitations.

Supported Browsers for Lightning Experience

Lightning Experience is supported with Apple[®] Safari[®] version 9.x and 10.x on Mac OS X, and Microsoft[®] Edge for Windows[®] 10. The most recent stable versions of Mozilla[®] Firefox[®] and Google Chrome[™] are also supported. Microsoft[®] Internet Explorer[®] version 11 is retiring beginning in Summer '16. If you're using Microsoft[®] Internet Explorer[®] versions 9–10, you're redirected to Salesforce Classic. There are some limitations.

Internet Explorer Settings

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

Firefox Settings

To ensure Salesforce works optimally with Firefox, update the browser's configuration settings.

SEE ALSO:

Requirements for the Salesforce1 Mobile App

Supported Browsers for Salesforce Classic

Salesforce Classic is supported with Microsoft[®] Internet Explorer[®] version 9, 10, and 11, Apple[®] Safari[®] version 8.x, 9.x, and 10.x on macOS, and Microsoft Edge for Windows[®] 10. The most recent stable versions of Mozilla[®] Firefox[®] and Google Chrome[™] are also supported. There are some limitations.

Note: Using Salesforce Classic in a mobile browser isn't supported. Instead, we recommend using the Salesforce1 app when you're working on a mobile device. To see the mobile browsers that are supported for Salesforce1, check out Requirements for the Salesforce1 Mobile App on page 128.

Microsoft Edge

Salesforce supports Microsoft Edge on Windows 10 for Salesforce Classic. Note these restrictions.

• The HTML solution editor in Microsoft Edge isn't supported in Salesforce Knowledge.

EDITIONS

Salesforce Classic available in: **All** Editions

• Microsoft Edge isn't supported for the Developer Console.

Microsoft Internet Explorer versions 9, 10, and 11

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

- If you use Internet Explorer, confirm that you have TLS 1.1 and TLS 1.2 enabled. For more information, see Enabling TLS 1.1 and TLS 1.2 in Internet Explorer.
- Internet Explorer 8 has limited support. Salesforce supports Internet Explorer 8 on Windows 7 only, with TLS 1.1 and/or TLS 1.2 enabled.
- The full Salesforce site is supported in Internet Explorer 9, 10, and 11 on Windows 8 and 8.1 for touch-enabled laptops with standard keyboard and mouse inputs only. There is no support for mobile devices or tablets where touch is the primary means of interaction. Use the Salesforce1 mobile browser app instead.
- The HTML solution editor in Internet Explorer 11 is not supported in Salesforce Knowledge.
- Both Compatibility Mode and the Compatibility View in Internet Explorer aren't supported.
- The Metro version of Internet Explorer 10 isn't supported.
- Internet Explorer 11 isn't supported for the Developer Console.
- Community Templates for Self-Service supports Internet Explorer 9 and above for desktop users and Internet Explorer 11 and above for mobile users.
- Internet Explorer 9 isn't supported for Salesforce Wave Analytics.
- Internet Explorer 9 and 10 aren't supported for the Lightning App Builder.
- Internet Explorer 9 and 10 aren't supported for Process Builder.
- Internet Explorer 9 users don't have browser-based spell check.
- Dragging and dropping files into feed comments isn't supported in Internet Explorer.

For configuration recommendations, see Internet Explorer Settings on page 11.

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

Mozilla Firefox, most recent stable version

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

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

For configuration recommendations, see Firefox on page 12.

Google Chrome, most recent stable version

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

Chrome isn't supported for the Console Tab (however, the Salesforce Console is supported).

Apple Safari versions 8.x, 9.x, and 10.x on Mac OS X

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

Safari isn't supported for:

- Salesforce Console in Salesforce Classic
- Salesforce Wave Analytics

Wave Analytics Supported Browsers

Browser support is available for Microsoft Edge, Microsoft Internet Explorer versions 10 and 11 and the most recent stable versions of Mozilla Firefox and Google Chrome.

Recommendations and Requirements for All Browsers

- For all browsers, enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn't available, enable TLS 1.1. Browsers that don't support TLS 1.1 or TLS 1.2 won't be able to access Salesforce after we deactivate TLS 1.0. Deactivation has already occurred in sandbox orgs and concludes with production orgs on July 22, 2017.
- The minimum screen resolution required to support all Salesforce features is 1024 x 768. Lower screen resolutions don't always properly display Salesforce features such as Report Builder and Page Layout Editor.
- For Mac OS users on Apple Safari or Chrome, make sure the system setting Show scroll bars is set to Always.
- Some third-party Web browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable the Web browser's plug-ins and extensions and try again.

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

- Internet Explorer is the only supported browser for:
 - Standard mail merge
 - Installing Salesforce Mobile Classic on a Windows Mobile device
 - Connect Offline
- For the best experience with the enhanced page layout editor, use Firefox.
- For the best experience on machines with 8 GB of RAM in the Salesforce console, use Chrome.
- Browser requirements also apply for uploading multiple files on Chatter.

SEE ALSO:

Requirements for the Salesforce1 Mobile App

Supported Browsers for Lightning Experience

Lightning Experience is supported with Apple[®] Safari[®] version 9.x and 10.x on Mac OS X, and Microsoft[®] Edge for Windows[®] 10. The most recent stable versions of Mozilla[®] Firefox[®] and Google Chrome[™] are also supported. Microsoft[®] Internet Explorer[®] version 11 is retiring beginning in Summer '16. If you're using Microsoft[®] Internet Explorer[®] versions 9–10, you're redirected to Salesforce Classic. There are some limitations.

EDITIONS

Lightning Experience is available in: Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

Note: You can't access Lightning Experience in a mobile browser. Instead, we recommend using the Salesforce1 app when you're working on a mobile device. For a list of supported mobile browsers on Salesforce1, see Requirements for the Salesforce1 Mobile App on page 128.

Microsoft Edge

Salesforce supports Microsoft Edge on Windows 10 for Lightning Experience. Note these restrictions.

- The HTML solution editor in Microsoft Edge isn't supported in Salesforce Knowledge.
- Microsoft Edge isn't supported for the Developer Console.

Microsoft Internet Explorer version 11

Important: Support for Internet Explorer 11 to access Lightning Experience is retiring beginning in Summer '16.

- You can continue to use IE11 to access Lightning Experience until December 16, 2017.
- If you opt into Extended Support for IE11, you can continue to use IE11 to access Lightning Experience until December 31, 2020.

This change doesn't impact Salesforce Classic or users of orgs with Communities.

For more details about this change, see Retirement of Support for Accessing Lightning Experience Using Microsoft Internet Explorer version 11.

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

- The full Salesforce site is supported in Internet Explorer 11 on Windows 8 and 8.1 for touch-enabled laptops with standard keyboard and mouse inputs only. There is no support for mobile devices or tablets where touch is the primary means of interaction. Use the Salesforce1 mobile browser app instead.
- The HTML solution editor in Internet Explorer 11 is not supported in Salesforce Knowledge.
- The Compatibility View feature in Internet Explorer isn't supported.
- Changing the compatibility parsing mode of the browser, for example, by using the X-UA-Compatibility header, isn't • supported.
- Internet Explorer 11 isn't supported for the Developer Console. ٠
- Internet Explorer 11 isn't supported for Lightning Console Apps. •
- Drag and drop of files into feed comments isn't supported in Internet Explorer.

For configuration recommendations, see Internet Explorer Settings on page 11.

Mozilla[®] Firefox[®], most recent stable version

Salesforce makes every effort to test and support the most recent version of Firefox. For configuration recommendations, see Firefox on page 12.

Google Chrome[™], most recent stable version

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



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

Apple[®] Safari[®] version 9.x, and 10.x on Mac OS X

There are no configuration recommendations for Safari.

Safari isn't supported for Salesforce Wave Analytics.

Wave Analytics Supported Browsers

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

Recommendations and Requirements for All Browsers

- For all browsers, enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn't available, enable TLS 1.1. Browsers that don't support TLS 1.1 or TLS 1.2 won't be able to access Salesforce after we deactivate TLS 1.0. Deactivation has already occurred in sandbox orgs and concludes with production orgs on July 22, 2017.
- The minimum screen resolution required to support all Salesforce features is 1024 x 768. Lower screen resolutions don't always properly display Salesforce features such as Report Builder and Page Layout Editor.
- For Mac OS users on Apple Safari or Google Chrome, make sure that the system setting Show scroll bars is set to Always. •

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

SEE ALSO:

Requirements for the Salesforce1 Mobile App

Internet Explorer Settings

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

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

General Tab

- 1. From the General tab, click **Settings** under Browsing History.
- 2. For the Check for newer versions of stored pages option, select Automatically.
- 3. For the Disk space to use option, enter at least 50 MB.

Security Tab

- 1. From the Security tab, click **Custom Level** under Internet and scroll to the Scripting section.
- 2. Make sure the Active Scripting option is enabled. JavaScript depends on this setting being enabled.

Privacy Tab

- 1. From the Privacy tab, click Advanced.
- 2. Select the Override automatic cookie handling option.
- 3. Select the Always allow session cookies option.
- 4. For the Third-party Cookies option, select Accept.

Advanced Tab

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

- Do not select the Do not save encrypted pages to disk option.
- Select Use TLS 1.0, Use TLS 1.1, and Use TLS 1.2. Make sure to deselect Use SSL 2.0 and Use SSL 3.0. SSL is no longer supported by Salesforce. TLS 1.0 won't be supported after we deactivate it, currently scheduled for June 2016 for sandbox orgs and early 2017 for production orgs.



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

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Available in: Salesforce Classic

Available in all editions

Firefox Settings

To ensure Salesforce works optimally with Firefox, update the browser's configuration settings. Salesforce makes every effort to test and support the most recent version of Firefox.

Advanced Settings

Configure advanced preferences to maximize performance.

- 1. Type *about:config* in the browser's location bar, and press Enter.
- 2. If a warning displays, click I'll be careful, I promise!
- **3.** Search for the following preferences and set them to the recommended value by double-clicking the preference name. Changes take effect immediately.
- 4. Enable tab focus on text fields, form elements, and links by setting this accessibility preference.

Preference	Recommended Value	Default Value
accessibility.tabfocus	7	1

5. Change how the browser retains common resources across requests by setting these caching preferences.

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

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

Tip: Setting privacy.sanitize.sanitizeOnShutdown to "True" causes the cache to clear when Firefox shuts down. This increases privacy, but can decrease performance.

To view the contents of your cache, type *about:cache* in the Firefox location bar and press Enter.

Refer to MozillaZine Knowledge Base and Firefox Support Home Page for more information on these and other preferences.

Supported Languages

Salesforce offers three levels of language support: fully supported languages, end-user languages, and platform-only languages.

A two-character language code identifies each language, such as en, or a five-character locale code, such as en_AU.



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

EDITIONS

Available in: Salesforce Classic

Available in all editions

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

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

Fully Supported Languages

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

- Chinese (Simplified): zh_CN
- Chinese (Traditional): zh_TW
- Danish: da
- Dutch: nl_NL
- English: en_US
- Finnish: fi
- French: fr
- German: de
- Italian: it
- Japanese: ja
- Korean: ko
- Norwegian: no
- Portuguese (Brazil): pt_BR
- Russian: ru
- Spanish: es
- Spanish (Mexico): es_MX
- Swedish: sv
- Thai: th

Note:

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

End-User Languages

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

End-user languages include:

• Arabic: ar

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

Note: Salesforce provides limited support for right-to-left languages—Arabic and Hebrew—for the following features.

- Live Agent
- Cases
- Accounts

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

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

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

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

Platform-Only Languages

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

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

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

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

The following platform-only languages are currently supported.

- Albanian: sq
- Arabic (Algeria): ar_DZ
- Arabic (Bahrain): ar_BH
- Arabic (Egypt): ar_EG
- Arabic (Iraq): ar_IQ
- Arabic (Jordan): ar_JO
- Arabic (Kuwait): ar_KW
- Arabic (Lebanon): ar_LB
- Arabic (Libya): ar_LY
- Arabic (Morocco): ar_MA
- Arabic (Oman): ar_OM
- Arabic (Qatar): ar_QA
- Arabic (Saudi Arabia): ar_SA
- Arabic (Sudan): ar_SD
- Arabic (Syria): ar_SY
- Arabic (Tunisia): ar_TN
- Arabic (United Arab Emirates): ar_AE
- Arabic (Yemen): ar_YE
- Armenian: hy
- Basque: eu
- Bosnian: bs
- Bengali: bn
- Chinese (Simplified—Singapore): zh_SG
- Chinese (Traditional—Hong Kong): zh_HK
- English (Australia): en_AU
- English (Canada): en_CA
- English (Hong Kong): en_HK
- English (India): en_IN
- English (Ireland): en_IE
- English (Malaysia): en_MY

- English (Philippines): en_PH
- English (Singapore): en_SG
- English (South Africa): en_ZA
- Estonian: et
- French (Belgium): fr_BE
- French (Canada): fr_CA
- French (Luxembourg): fr_LU
- French (Switzerland): fr_CH
- Georgian: ka
- German (Austria): de_AT
- German (Luxembourg): de_LU
- German (Switzerland): de_CH
- Hindi: hi
- Icelandic: is
- Irish: ga
- Italian (Switzerland): it_CH
- Latvian: 1v
- Lithuanian: lt
- Luxembourgish: 1b
- Macedonian: mk
- Malay: ms
- Maltese: mt
- Romanian (Moldova): ro_MD
- Montenegrin: sh_ME
- Romansh: rm
- Serbian (Cyrillic): sr
- Serbian (Latin): sh
- Spanish (Argentina): es_AR
- Spanish (Bolivia): es_BO
- Spanish (Chile): es_CL
- Spanish (Colombia): es_CO
- Spanish (Costa Rica): es_CR
- Spanish (Dominican Republic): es_DO
- Spanish (Ecuador): es_EC
- Spanish (El Salvador): es_SV
- Spanish (Guatemala): es GT
- Spanish (Honduras): es_HN
- Spanish (Nicaragua): es_NI
- Spanish (Panama): es_PA
- Spanish (Paraguay): es_PY

- Spanish (Peru): es_PE
- Spanish (Puerto Rico): es_PR
- Spanish (United States): es_US
- Spanish (Uruguay): es_UY
- Spanish (Venezuela): es_VE
- Tagalog: tl
- Tamil: ta
- Urdu: ur
- Welsh: cy

Locale and Language Support for the Salesforce1 App

Salesforce1 works with almost all Salesforce-supported locales and the fully supported and end-user languages. (The Salesforce Help includes a complete list of supported locales and languages.) Languages that are read right to left, including Arabic and Hebrew, aren't supported in this release.

Locale and Language Support for the Salesforce1 App

Salesforce 1 works with almost all Salesforce-supported locales and the fully supported and end-user languages. (The Salesforce Help includes a complete list of supported locales and languages.) Languages that are read right to left, including Arabic and Hebrew, aren't supported in this release.

Note: The Salesforce1 downloadable apps use the language and locale settings from both your Salesforce user profile and the locale settings on your mobile device. If your device uses different locale settings than are specified for your user profile, you may see different languages displayed throughout the app. For example, the navigation menu might display in English while records display in French.

Salesforce1 includes multi-currency support, but advanced currency management isn't available.

Accessibility Standards

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

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

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

General Accessibility Requirements

Consider these requirements when using Salesforce.

• JavaScript support must be available and turned on.

EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

EDITIONS

Available in: Salesforce Classic

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

Recommended Browsers

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

Contacting Salesforce with Accessibility Concerns

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

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

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

Accessibility Mode

Learn how accessibility mode changes your experience using Salesforce.

Enable Accessibility Mode

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

Recommendations for Salesforce Accessibility

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

Keyboard Shortcuts

Use keyboard shortcuts to work efficiently in Salesforce.

Keyboard Shortcuts for Lightning Experience Composer Windows

Use keyboard shortcuts to work efficiently in Lightning Experience composer windows. Open a composer window to create tasks, jot down notes, log a call, and more. Keyboard shortcuts make it easy to cycle through the fields inside a composer and work your way through multiple composer windows that are open at the same time.

Salesforce1 Mobile App Accessibility Considerations

The Salesforce1 mobile app is designed to give users working with screen readers and other accessibility features a fully accessible mobile experience. Unlike the full Salesforce site, Salesforce1 doesn't require accessibility mode. If you use Salesforce1 with an assistive device, look here for considerations to keep in mind.

Accessibility Mode

Learn how accessibility mode changes your experience using Salesforce.

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

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

Accessibility Mode Features that Enhance Usability

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

Disabled Calendar Features

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

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

Disabled Report and Dashboard Features

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

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



Available in: Salesforce Classic

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

Disabled List View Features

- Related list hover links
- These enhanced list features:
 - Inline editing
 - Rearranging and adjusting the width of columns
 - Editing, deleting, or refreshing the current list view
 - Changing the number of records displayed per page
 - Jumping to a specific page of results

Other Disabled Features

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

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

Enable Accessibility Mode

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

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

Recommendations for Salesforce Accessibility

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

Here are some recommendations to help you work with Salesforce.

Sighted Keyboard Users

Learn about Salesforce accessibility features designed for sighted keyboard users.

Screen Reader Users

Learn about Salesforce accessibility features designed for screen reader users.

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic

Deaf or Hearing Impaired Users

Salesforce provides video demos hosted on YouTube.

Specific Color Users

Tips for users who rely on browser settings and their operating system to change their display to a particular color combination.

Low-Vision Users Who Require Magnification

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

Sighted Keyboard Users

Learn about Salesforce accessibility features designed for sighted keyboard users.

These Salesforce features help ensure an accessible experience.

- Accessibility Mode helps you work more effectively with Salesforce, particularly reports, dashboards, and list views. See Accessibility Mode on page 19 for more information.
- Selected areas on the screen include highlights to give you an on-screen visual indication of focus.
- These elements are identified in our page markup to help you interact with them.
 - Headings are marked up as headings rather than field set and legend elements for grouping form controls.
 - The main heading for the page (typically at the start of the main content area) is a level 1 heading. You can shift to this heading with a shortcut key.
 - Data tables have data table markup (except enhanced listviews in Standard Mode only) to aid identification of headers for each cell.
 - Lists provided in the main content area are marked up as lists.
- A skip link (the first keyboard-focusable link on each page) allows you to shift the focus to the start of the main content area. This feature generally bypasses the navigational menus before the main content area. It greatly reduces the number of tab presses that are otherwise required to reach the main content area of the page.
- Keyboard focus is placed inside dialog boxes when they open and remains locked there until the dialog is closed.
- On edit pages, the keyboard focus defaults to the first editable field on the page. When creating or editing a task or event, the keyboard focus defaults to the Subject field, regardless of its location on the page.
- Buttons, links, and fields that aren't currently active are labeled with a "disabled" attribute. For example, when using a wizard with multiple steps, some buttons are disabled until you select a specific option.

Screen Reader Users

Learn about Salesforce accessibility features designed for screen reader users.

Salesforce on-demand applications are designed to take advantage of the latest features of the most widely used screen reading software. We recommend that you use the most current versions of Mozilla[®] Firefox[®] and JAWS[®] or NVDA with Salesforce.

These Salesforce features help ensure an accessible experience:

- Accessibility Mode helps you work more effectively with Salesforce, particularly reports, dashboards, and list views. See Accessibility Mode on page 19 for more information.
- Important images have text alternatives equivalent to the purpose of the image; non-important
 images have empty text equivalents or are implemented through CSS. Images showing detailed information are also links to source
 data. For example, Dashboards contain charts and graphs that are visual in nature. To access the report data used to generate the
 chart or graph, simply select the dashboard component.

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic



Note: The underlying report can contain more data than what is represented in the dashboard component. It can also contain some data that you don't have access to view due to sharing settings.

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

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

- Set pages to refresh automatically.
- Turn on live region update announcements.
- Set text links to show titles. This setting ensures that the screen reader announces information provided through a link's title attribute, such as a warning about a new window.
- Set headings to announce Headings and Levels. Heading markup is used to provide context and navigation.
- Add common signs, such the @ (at) sign for mentioning people in Chatter posts and comments, to your screen reader dictionary.

Deaf or Hearing Impaired Users

Salesforce provides video demos hosted on YouTube.

To view synchronized captions for videos, click Watch on YouTube.com in the bottom-right corner of embedded videos.

EDITIONS

Available in: Salesforce Classic

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

Specific Color Users

Tips for users who rely on browser settings and their operating system to change their display to a particular color combination.

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

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

EDITIONS

Available in: Salesforce Classic

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

In addition,

- Some charts (for example, in reports and dashboards) rely on color to display information. If you have trouble interpreting the ٠ information in charts, select Color-Blind Palette on Charts from your personal detail page. This option sets an alternate color palette for charts that has been optimized for use by color-blind users. Dashboard emails don't use the alternate palette. You can also click a chart to view its source report.
- Dashboards contain charts and graphs that are visual in nature. To access the report data used to generate the chart or graph, simply select the dashboard component.

Note: The underlying report can contain more data than what is represented in the dashboard component. It can also contain some data that you don't have access to view due to sharing settings.

Low-Vision Users Who Require Magnification

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

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

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

Keyboard Shortcuts

Use keyboard shortcuts to work efficiently in Salesforce.

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

- Press ALT plus any number between 0 and 9 to highlight an item in the Recent Items list in the sidebar. For example, press ALT+1 to highlight the first item in the list, ALT+2 to highlight the second item, and so on. Pressing ALT+0 highlights the tenth item in the list.
 - Note: If you're using Mozilla® Firefox®, press SHIFT+ALT plus a number to automatically display the item you highlighted. If you're using Mozilla Firefox on a Mac, press CTRL plus a number. If you're using Microsoft[®] Internet Explorer[®], press ALT plus a number and then press Enter to display the highlighted item.
- If your organization has enabled the collapsible sidebar, press ALT+S to open or close the sidebar. Opening the sidebar using ALT+S automatically places your cursor in the Search box.

EDITIONS

Available in: Salesforce Classic

Available in: All Editions except Database.com

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Keyboard Shortcuts for Lightning Experience Composer Windows

Use keyboard shortcuts to work efficiently in Lightning Experience composer windows. Open a composer window to create tasks, jot down notes, log a call, and more. Keyboard shortcuts make it easy to cycle through the fields inside a composer and work your way through multiple composer windows that are open at the same time.

In addition to the standard keyboard shortcuts available with your Web browser, Lightning Experience supports these handy shortcuts when using the composer windows.

- Alt+1: opens the overflow menu from anywhere on the page
- Up and Down Arrow keys: moves through the list of open composer windows in the overflow menu
- Left and Right Arrow keys: moves between open composer windows
- Enter (from a composer window's header): moves focus to inside the composer window
- Tab key: cycles through the fields inside the composer window
- Esc key: moves focus from a composer window to the window's header

Salesforce1 Mobile App Accessibility Considerations

The Salesforce1 mobile app is designed to give users working with screen readers and other accessibility features a fully accessible mobile experience. Unlike the full Salesforce site, Salesforce1 doesn't require accessibility mode. If you use Salesforce1 with an assistive device, look here for considerations to keep in mind.

Salesforce1 works with all the accessibility features built into your mobile device, including VoiceOver and AssistiveTouch on iOS devices and TalkBack and Explore by Touch on Android devices. The following, however, are known issues that affect those accessibility features.

On an iOS device, assistive technology users should consider these issues:

- When VoiceOver is enabled, you may not be able to use three-finger scrolling on some pages. Instead, use the buttons on the top and bottom of the screen to scroll vertically and the buttons on the left and right of the screen to scroll horizontally.
- Using pinch and spread to zoom isn't currently supported. To zoom, use the iOS zoom function.
- Introductory screens have decorative images that are called out but not identified as decorative.

On an Android device, assistive technology users should consider the following:

- When you post to Chatter, the area for writing your post isn't announced.
- Introductory screens have decorative images that are called out but not identified as decorative.

On all devices, the close button for the notifications list doesn't have a description. The notifications list is located in the upper left of the screen.

Additional Resources

Looking for more resources? Check out our tip sheets, implementation guides, videos, and walkthroughs.



Available in Lightning Experience

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

EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com



Available in: All Editions

Tip Sheets and Implementation Guides

In addition to online help, Salesforce publishes additional material to help you be successful with Salesforce. These documents include tip sheets, implementation guides, and other resources that describe the features and capabilities of Salesforce.

Get More Done Faster with Walkthroughs

Interactive walkthroughs guide you step-by-step through a task or feature. Salesforce creates walkthroughs to help you be successful with Salesforce.

Video Demos

Tip Sheets and Implementation Guides

In addition to online help, Salesforce publishes additional material to help you be successful with Salesforce. These documents include tip sheets, implementation guides, and other resources that describe the features and capabilities of Salesforce.

Note: Adobe Reader[®] is required to open Adobe[®] PDF files. To download the latest version of Reader, go to www.adobe.com/products/acrobat/readstep2.html.

Printable Tip Sheets & User Guides — All Users Information about system requirements, custom views, content deliveries, and Chatter Plus. Printable Tip Sheets & User Guides — For Sales Professionals Printable Tip Sheets & User Guides — For Support Professionals Printable Tip Sheets & User Guides — For Marketing Professionals Printable Tip Sheets & User Guides — For Analytics Admins and End Users This topic contains tip sheets and implementation guides that can be reused in multiple topics and in multiple cloud-based bundles. Printable Tip Sheets and User Guides — For Administrators

Printable Tip Sheets & User Guides — All Users Information about system requirements, custom views, content deliveries, and Chatter Plus.

- How to be Successful with Salesforce
- Tips & Hints for Custom Views
- Salesforce System Requirements
- Tips for Using Content Deliveries
- Using Salesforce Group Edition
- Chatter Plus Frequently Asked Questions

Printable Tip Sheets & User Guides — For Sales Professionals

Enterprise Territory Management

• Enterprise Territory Management Implementation Guide

Account Management

• Getting Microsoft[®] Outlook[®] and Salesforce in Sync

Get Started with Salesforce

- Get Ready to Sync Contacts and Events with Exchange Sync (Beta)
- Tips & Hints for Sales Reps
- Tips for Using Content Deliveries
- Tips for Using HTML Email Templates
- Using Force.com Connect for Office
- Salesforce Bulk Mail Merge Process
- Guidelines for Uploading Mail Merge Templates
- Sample Mail Merge Templates (Zip file)
- Getting Started with Force.com Connect Offline
- Tips & Hints for Working with Territories

Pipeline Management

- Collaborative Forecasts Implementation Guide—For administrators of Collaborative Forecasts.
- Using Customizable Forecasts—For users of Customizable Forecasting. For more information, search for "Customizable Forecasting Overview" in the Salesforce online help.
- Tips & Hints for Products & Schedules

Mobile

- Using the Salesforce1 App
- Salesforce Mobile Classic User Guide for iPhone
- Salesforce Mobile Classic User Guide for Android

Printable Tip Sheets & User Guides — For Support Professionals

These documents are for support professionals.

- Tips & Hints for Support Reps
- Getting Started with your SoftPhone
- Using the Console Tab
- Tips & Hints for Solutions
- Getting to Know Case Feed
- Live Agent for Support Agents
- Live Agent for Support Supervisors

Printable Tip Sheets & User Guides — For Marketing Professionals

The following documents apply to marketing professionals:

- Getting the Most from Your Leads
- Five Steps for Managing Campaigns
- Tips for Using Content Deliveries

Printable Tip Sheets & User Guides — For Analytics Admins and End Users

This topic contains tip sheets and implementation guides that can be reused in multiple topics and in multiple cloud-based bundles.

Wave Analytics

- Wave Analytics Setup Guide
 - Learn how to set up Analytics Cloud.
- Wave Analytics Security Implementation Guide

Learn how to implement security on Salesforce data, apps, and datasets.

- Wave Analytics Data Integration
- Wave Analytics External Data API Developer Guide
- Wave Analytics External Data Format Reference
- Wave Analytics SAQL Reference
- Wave Analytics Dashboard JSON Reference
- Wave Analytics Extended Metadata (XMD) Reference

Reports and Dashboards

- Getting Started with Salesforce Reports and Dashboards
- Analytics Workbook
- Reports Tab
- Using the Drag-and-Drop Report Builder
- Do your big reports take a long time to return data?
- Report Formula Summary Functions
- FAQ: Scheduling Reports
- Tips for Creating Dashboards
- One Dashboard For Many Viewers
- Taking Advantage of Dynamic Dashboards
- Sample CRM Dashboards
- What Are Joined Reports?
- Using Cross Filters in Reports
- Using Bucket Fields

Printable Tip Sheets and User Guides — For Administrators

Mobile Administration

- Salesforce1 Mobile App Admin Guide
- Salesforce Mobile Classic Implementation Guide

Sales Administration

• Get Started with Sales Cloud

Get Started with Salesforce

- Enhance Your Sales Cloud Implementation
- Enterprise Territory Management Implementation Guide
- Team Selling Implementation Guide
- Setting Up Shared Calendaring
- Implementing Person Accounts
- Collaborative Forecasts Implementation Guide
- Setting Up Customizable Forecasting
- Customizable Forecasting FAQ
- Salesforce CRM Content Implementation Guide
- Administering Salesforce Desktop Clients
- Helping Users Sync Contacts and Events with Lightning Sync
- *Getting Started with Relationship Groups*
- Getting Started with Assets
- Lightning Voice Implementation Guide
- Work.com Implementation Guide
- Deploying Territory Management (This version of Territory Management precedes Enterprise Territory Management.)
- Implementing Data.com Clean
- Syncing Between Pardot and Salesforce
- Utility Bar API Implementation Guide

Support Administration

- Salesforce Console Implementation Guide
- Setting Up Customer Support
- Case Management Implementation Guide
- Complete Guide to Salesforce Knowledge
- Solutions Implementation Guide
- Getting Started with Setting Up Call Centers
- Complete Guide to Field Service Lightning
- Getting the Most from Your Self-Service and Customer Portals
- Salesforce Customer Portal Implementation Guide
- Chatter Answers Implementation Guide
- Self-Service Portal Implementation Guide
- Salesforce CRM Content Implementation Guide
- Answers Implementation Guide
- The Admin's Guide to Entitlement Management
- Live Agent for Administrators
- Setting Up Case Feed
- Getting Started with the Ideas Base Theme
- Complete Guide to Social Customer Service
- Set Up Omni-Channel

• Set Up SOS Video Chat and Screen-Sharing

Marketing Administration

- Tips for Lead Administrators
- Salesforce Lead Management Implementation Guide
- Campaign Management Implementation Guide
- Salesforce Ideas Implementation Guide

Communities and Collaboration Administration

- Set Up and Manage Communities
- Community Templates for Self-Service Implementation Guide
- Communities Managers Guide
- Migrating From Portals to Communities
- Quick Actions Implementation Guide
- Customizing Chatter Profile Pages
- Salesforce Files Sync Implementation Guide
- Salesforce Files Connect Implementation Guide

Salesforce Implementations

- Salesforce Enterprise Edition Upgrade Guide
- Setting Up Salesforce Group Edition
- Salesforce Limits Quick Reference Guide

Platform and Apps

- Building Custom Objects, Tabs, and Related Lists
- Implementing State and Country Picklists
- Formulas Quick Reference Guide
- Useful Formula Fields
- Tips for Reducing Formula Size
- Using Date and Date/Time in Formulas
- Useful Validation Rules
- Using Multiple Business Processes
- Useful Workflow Rules
- Useful Approval Processes
- Visual Workflow Guide
- Organization Sync Implementation Guide

Security and Data Management

- Security Implementation Guide
- Managing Duplicate Records in Salesforce

- Single Sign-On Implementation Guide
- Platform Encryption Implementation Guide
- Platform Encryption Tip Sheet
- Understanding User Sharing
- Understanding Defer Sharing Calculations
- Managing Data Quality
- Importing Your Organization's Accounts and Contacts
- Using Mass Delete to Undo Imports
- Getting Started with Divisions
- Data Loader Guide
- Salesforce Field Reference Guide
- *Resolving Data Conflicts and Errors in Force.com Flex Apps*
- Salesforce Identity Implementation Guide
- Identity Connect Implementation Guide

Extending Salesforce

- Developing Packages for Distribution
- Force.com Sites Implementation Guide
- OEM User License Comparison
- Custom Metadata Types Implementation Guide

Globalization

• International Organizations: Using Multiple Currencies

Health Cloud

Administration

- Health Cloud Implementation Guide
- Health Cloud Object Reference Guide

Financial Services Cloud

Administration

- Financial Services Cloud Quick Start
- Financial Services Cloud Administrator Guide
- Financial Services Cloud Upgrade Guide
- Financial Services Cloud Object Reference Guide

Get More Done Faster with Walkthroughs

Interactive walkthroughs guide you step-by-step through a task or feature. Salesforce creates walkthroughs to help you be successful with Salesforce.

Before you click a walkthrough link, make sure you have the correct user permissions and license associated with the feature so you can access the proper pages in Salesforce. Then, click the link to open the walkthrough. If you're not already logged in, you'll be prompted to log into your account.

EDITIONS

Available in: All Editions

The walkthrough guides you through a series of steps to help you complete a task or review a feature directly within your own Salesforce account.

Note: Keep in mind that walkthroughs guide you through your own Salesforce account rather than a demo environment. So you're actually making changes to the data in your org as you follow along through the steps. If you're concerned about making these changes, follow the walkthrough in a sandbox account or other test environment first.

Video Demos

Salesforce creates video demos to help you be successful with Salesforce. All videos are in English.

- Salesforce Setup
- User Setup
- Managing Users
- General Salesforce Functionality
- Communities and Chatter
- Sales
- Service
- Data.com
- Platform and Apps
- Security
- Salesforce Identity
- Data Import
- Wave Analytics, Reports, and Dashboards

Salesforce Setup

Video Title	For End Users	For Admins
Get Ready to Migrate to Lightning Experience		~
Lightning Experience is the modern and intelligent Salesforce user interface that transforms the way sales reps get their work done. But before reps can get started, Salesforce administrators have to migrate from Salesforce Classic. This video demonstrates how the Migration Assistant is here to guide admins each step of the way.		
Ready for Lightning Experience?		~
Readiness Check generates a customized report that helps you prepare some of your features and customizations for Lightning Experience. To help you start your migration		

Video Title	For End Users	For Admins
plan, we'll also tell you how to connect with one of our Lightning Experience experts for a 30-minute consultation.		
Tips for Migrating to Lightning Experience		~
Lightning Experience is the modern and intelligent Salesforce user interface that transforms the way sales reps get their work done. But before reps can get started, Salesforce administrators have to migrate from Salesforce Classic. This video provides guidelines and resources for migrating to Lightning Experience.		

User Setup

Video Title	For End Users	For Admins
Need Help Logging In? (Salesforce Classic)	~	
A quick video to help you in case you forgot your Salesforce password!		

General Salesforce Functionality

Video Title	For End Users	For Admins
Search in Salesforce Classic	~	
This video walks you through searching in Salesforce, and within Chatter, so you can locate files, posts, records, and topics quickly.		
• Filtering Search Results in Salesforce Classic	~	
Looking for a record, but are having trouble navigating the search results page? Here's how to use filters to refine search results in Salesforce Classic.		
Search in Salesforce Lightning Experience	~	
This video guides you through searching in Salesforce Lightning Experience and navigating search results.		
• How Does Search Work?	~	~
Ever wonder how search finds information in your org? This video guides you through the search process, including how your search terms are broken up and matched against the search index.		
• How to Search In Help	~	
Our Help portal is extensive, with everything from documentation, to troubleshooting-type knowledge articles, videos, and more. Fine-tune your search settings and learn to use the filters so that you can find exactly what you need, every time.		

Communities and Chatter

Video Title	For End Users	For Admins	
Discover and Organize with Chatter Topics (Salesforce Classic)	~		
Use Chatter topics to see what people are talking about, organize the conversations you want to be a part of, and discover people and groups that are interested and knowledgeable in the same areas.			
Get Started with Salesforce Files Sync	~		
Learn how to sync files between your computer or mobile device and Salesforce so you always have the latest version of every file.			

Sales

Video Title	For End Users	For Admins
Lightning Experience: Take it for a Spin	~	
This video showcases the full Salesforce Lightning Experience. Learn how to find your personal settings, where to find items such as records and apps, and how to navigate records and find details and common actions.		
Use Tasks in Lightning Experience to Boost Sales Productivity	~	
Learn three powerful ways to manage tasks in Lightning Experience.		
Qualify and Convert Your Leads Efficiently (Lightning Experience)	<	
The lead workspace in Lightning Experience is command central for working toward lead qualification. Log calls, create tasks, collaborate, and send email—all from your workspace.		
Work Your Opportunities and Manage Your Pipeline (Lightning Experience)	~	
This video show you how to work your deals and manage your pipeline in the Salesforce Lightning Experience.		
Take Your Tasks from Desktop to Mobile (Salesforce Classic)		~
See how our setup wizard helps you get started with Salesforce.		
Salesforce Basics for Helping Your Sales Teams Close Deals Faster	<	~
Learn about the standard objects you use in Salesforce to store your data.		
Take Your Tasks from Desktop to Mobile	~	
Stay on top of your tasks when you're on the go by using the Salesforce1 app for phones and tablets.		
Accounts and Contacts on the Go (Salesforce Classic)	~	
Combine desktop and mobile data with the Salesforce1 app for phones and tablets.		

Video Title	For End Users	For Admins
Splitting Credit across Your Sales Team (Salesforce Classic)	~	
Learn how to add revenue and overlay splits to opportunities.		
Connecting Social Networks to Accounts, Contacts, and Leads (Salesforce Classic)	~	
Gain insights to your current and prospective customers by adding social data to your Salesforce accounts, contacts, and leads.		
Editing Role-Based Category Group Visibility		~
Allows certain roles to view information, such as questions in an answers community or articles in a knowledge base, according to specific data categories.		
• Forecast Accurately With Collaborative Forecasts (Salesforce Classic)	~	
See how to maneuver around Collaborative Forecasts so that you can reach your sales goals.		
Sending Mass Email (Salesforce Classic)	~	
This demo shows you how to leverage the mass email tool in Salesforce, so you can quickly contact your customers and track these emails within the Salesforce app.		
Creating Quote Templates (Salesforce Classic)	~	
Quote templates let you design, preview, and activate templates for the quote PDFs that sales reps send to customers.		
• How to Merge Contacts in Salesforce	~	
Learn how you can merge duplicate contact records in Salesforce.		
• How to Use Notes	~	
Learn how to use Notes, the enhanced note-taking tool in Salesforce1.		
Merging Duplicate Accounts: Tips and Gotchas (Salesforce Classic)	~	
The Merge Accounts tool lets you merge multiple account records into one, and lets you choose which data to keep from each record. This video guides you through the process so you can get clean, useful data, quickly.		
Relate a Single Contact to Multiple Accounts (Lightning Experience)	~	
Learn how easy it is to track the relationships between people and the businesses they work with. When you relate a single contact record to multiple account records, you can view current and past relationships so you always know who you're talking to—or who you <i>should</i> be talking to.		
Set Up Contacts to Multiple Accounts		~
Let your sales reps easily track the relationships between the customers and businesses they work with. Contacts to Multiple Accounts is quick to set up and allows reps to relate a single contact record to multiple accounts.		

Video Title	For End Users	For Admins
Lightning Sync Videos		
Set Up a Microsoft [®] Exchange Service Account to Sync with Salesforce (for administrators using Office 365 [™] Admin Center)		~
Configure an Exchange service account for Lightning Sync using the Microsoft Office 365 point-and-click interface.		
Set Up a Microsoft [®] Exchange Service Account to Sync with Salesforce (for administrators using command shell)		~
Configure an Exchange 2013, Exchange 2016, or Microsoft Office 365 [™] (Exchange Online) service account for Lightning Sync using a command-line interface.		
Salesforce for Outlook Videos		
Getting Started with Salesforce for Outlook	~	
Salesforce for Outlook lets you sync contacts, events, and tasks between Microsoft [®] Outlook [®] and Salesforce. You can also associate Outlook emails, events, and tasks to Salesforce records, directly from Outlook. Learn how to download and install the product on your system.		
Learning about Sync Directions (Salesforce Classic)	~	
Learn how to view your sync direction settings in Salesforce for Outlook, and find out whether you have permissions to change them.		
Using the Salesforce Side Panel to Work with Records in Microsoft [®] Outlook [®]	~	
Learn how you can work with Salesforce records directly in Outlook. In addition, learn about adding Outlook emails and events to the Salesforce records of your choice.		

Service

Video Title	For End Users	For Admins
	<	
Introducing the Salesforce Console	~	
The Salesforce console uses tabs to help you find and update records quickly.		
Plan Your Salesforce Console Implementation		~
low to set up a Service Cloud console for support agents.		
Entitlement Management Setup (Salesforce Classic)		~
Learn how to set up the Entitlement Management feature. Entitlement Management nelps your support reps determine which customers are eligible for certain kinds of support. This video covers Entitlement Management Milestones, Entitlement Processes, Entitlements, and Service Contracts.		

Video Title	For End Users	For Admins
• Updating Entitlement Processes with Entitlement Versioning (Salesforce Classic) Learn how to create a new version of an entitlement process, edit the new version, and apply it to new and existing entitlements.		V
Support Your Customers on Their Social Networks Learn how to get started with Social Customer Service.		*
Live Agent Configuration (Salesforce Classic) Set up Live Agent in your Salesforce console and get your agents chatting!		*
Overview of Lightning Service Setup Home		~
Getting Started with Recommended Setup		~
Learn the Basics of Lightning Service		~

Platform and Apps (General)

Video Title	For End Users	For Admins
• How to Change the Look and Feel of Salesforce for Your Company (Salesforce Classic)		~
Quick demo of how to customize the way Salesforce looks for your organization.		
Creating a Workflow Rule (Salesforce Classic)		~
Quick demo of how to create a workflow rule in Salesforce.		
Visual Workflow Cloud Flow Designer Overview		~
This demo gives you an overview of Visual Workflow's Cloud Flow Designer, the tool for creating flows. With the Salesforce Cloud Flow Designer, you can configure screens and define branching logic for your flows, completely within Salesforce, without writing any code.		
Building a Simple Flow (Salesforce Classic)		~
Follow along as we create a simple two-screen pledge flow using user input fields and choices. We collect users' information, ask them to choose a pledge level, then thank them for their donation.		
• Troubleshooting Workflow (Salesforce Classic)		~
Learn how to investigate and troubleshoot the most common issues that occasionally arise with Workflow.		
• Avoid Unwanted Actions in Your Process		~
This video shows you how to set options in the Process Builder so you can, for example, avoid sending a bunch of emails to the VP every time a high-value opportunity is updated.		

Video Title	For End Users	For Admins	
Creating Custom Links and Buttons		~	
Learn how to create a link on the Account object that maps the company's address onto Yahoo Maps.			
Who Sees What: Record Types (Salesforce Classic)		~	
Learn how to organize and gather data for the same object, in different ways, using record types.			

Custom Fields

Video Title	For End Users	For Admins
How to Create a Custom Field in Salesforce (Salesforce Classic)		~
Want to customize Salesforce so it captures all your business data? This short video walks you through how to create a custom picklist field, from choosing the correct field type to applying field level security.		
Custom Fields: Picklists		~
This video walks you through creating a picklist field and adding new values to the field, and deleting old values. We even cover how to add your values to the correct page layouts, so your users see choices that are relevant to their work.		

Formulas

Video Title	For End Users	For Admins	
Getting Started With Formulas (Salesforce Classic)		~	
This video gives a brief introduction to Salesforce formulas, accessing the formulas editor in the app, and how to use the editor tools to create formulas.			
How to Build an Image Formula (Salesforce Classic)		~	
This video explains how to create a quick and easy formula that adds graphics to the ratings field on a lead—five stars for hot, three stars for warm, and one star for cold—so that salespeople can see at a glance which leads are the most important.			
Formulas: Tips and Gotchas (Salesforce Classic)		~	
Formulas are a powerhouse and can be used in fields and reports. This video walks you through a few pro tips on how to get started, and how to avoid some common pitfalls.			

Log In, Navigate, and Search Salesforce

New to Salesforce? Learn how to navigate, customize, and manage basic CRM features.

Log In for the First Time

Your welcome email includes a link to your organization's Salesforce site and your login information.

Change Your Password

After you log in, you can change your password for better security. If you lost your password, click the **Forgot Your Password** link on the login page to reset your password via email.

Change Your Security Question

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

Download Plug-Ins for Documentation and Online Training Courses

The Salesforce PDF documentation and online training courses use free plug-ins like Adobe Reader and Macromedia Flash Player.

Navigate Salesforce Tabs

At the top of each Salesforce page are tabs and links for navigating to major features in Salesforce.

Search Across Salesforce

Search across Salesforce, including records, Chatter feeds, people, groups, and tasks. Search is available via the Salesforce site, a Salesforce1 mobile app, or a custom search implementation built on the Salesforce platform.

Set Up Your Chatter Profile

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

Explore the Salesforce Setup Menu

Salesforce includes many options for setting up, maintaining, and customizing your organization. If you're a Salesforce administrator or developer, you use the Setup menu frequently.

View and Purge the Recycle Bin

The Recycle Bin contains items that were deleted. Salesforce admins can see all deleted data across the entire org. The Recycle Bin is available in the left sidebar on the Home page in Salesforce Classic.

View and Display FAQ

Common questions around popup windows, buttons, links, and other display elements on Salesforce pages.

Tips for New Users

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

Log In for the First Time

Your welcome email includes a link to your organization's Salesforce site and your login information.

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

- 1. Check your email for your login information.
- Click the link provided in the email. The link logs you in to the site automatically.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in all editions

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

Change Your Password

After you log in, you can change your password for better security. If you lost your password, click the **Forgot Your Password** link on the login page to reset your password via email.

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

- Note: If you have the "User Single Sign-On" permission, only an administrator can reset your password. For help, contact your Salesforce administrator.
- 1. From your personal settings, enter *Password* in the Quick Find box, then select **Change My Password**.
- 2. Enter the password information requested.
- 3. Click Save.

Change Your Security Question

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

- Note: If you don't see the Change My Password option, contact your Salesforce admin for assistance.
- 1. From your personal settings, enter *Password* in the Quick Find box, then select **Change My Password**.
- 2. Enter your current password.
- 3. From the Security Question drop-down menu, select a question.
- 4. Enter your answer to the question in the Answer field.
- 5. Click Save.

Download Plug-Ins for Documentation and Online Training Courses

The Salesforce PDF documentation and online training courses use free plug-ins like Adobe Reader and Macromedia Flash Player.

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Available in all editions

EDITIONS

Available in: Salesforce Classic

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

Navigate Salesforce Tabs

At the top of each Salesforce page are tabs and links for navigating to major features in Salesforce.

Available in: Salesforce Classic Available in: All Editions except for Database.com 2 Search Search Erin Tid Chatter Profile Groups Files Opportunities Reports Dashboards Products Leads Accounts Contacts ÷

- Click a tab to switch between objects and features (1)
- Search to find any type of record (2)
- Access user-specific customizations from the drop-down next to your name (3)
- If you have administrator privileges, use the Setup menu to customize Salesforce for your organization (4)
- Access help resources and training (5)
- View and access other apps within Salesforce (6). Each app contains different features and tabs.
- To view more tabs, click the plus icon (+) next to the main tabs.



Explore the Home Tab

When you log in to Salesforce, your initial view is most likely the Home tab.

Explore Object Tabs

Object tabs show pages for your Salesforce objects, like for example a summary of your accounts.

Explore Detail Pages

Detail pages show you details about a record, for example details about a particular account.

Access Other Salesforce Apps

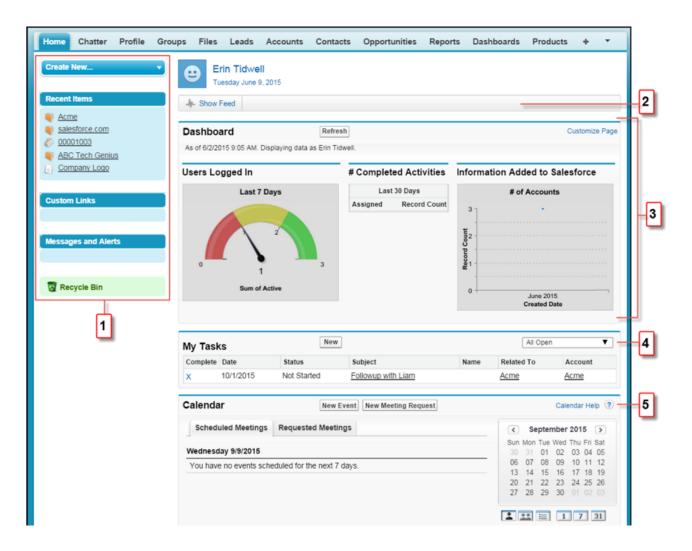
Looking for a particular feature? Check out the app menu or App Launcher to see all the Salesforce apps that are available to you.

Explore the Home Tab

When you log in to Salesforce, your initial view is most likely the Home tab.

The tabs and features you see depend on your edition, layout, and customizations. The default layout typically includes:

- A sidebar (1). Here you can create records, jump to items that you recently viewed, add links, or restore items that you deleted. This sidebar also appears on many other pages.
- Your Chatter feed (2). Collaborate with colleagues in context, all in Salesforce. Your feed can be collapsed (as shown) or expanded by clicking **Show Feed**.
- Dashboards showing up-to-the-minute results from several reports (3). Dashboard information is refreshed whenever you reload the page.
- Your open tasks (4) in Salesforce, with the option to filter by date range or view all open tasks. If you don't see them right away, scroll down, or collapse the Chatter feed to move up Tasks.
- Your calendar of events (5) in Salesforce, including options to create events.



Explore Object Tabs

Object tabs show pages for your Salesforce objects, like for example a summary of your accounts.

Let's walk through what you see on the Accounts tab. Select Sales from the app menu, and then click the Accounts tab.

Home Chatter Profile Gro	oups Files Leads Accounts	Contacts C	Opportunities	Reports	Dashboards	Products	Forecasts	+
Create New 🔻	Home 1					Tell me mo	re! Help for this P	age 🕜
Recent Items	View: All Accounts	▼ Go! Ed	it Create New	View				
salesforce.com © 00001003	Recent Accounts 2	New					Recently Viewed	¥
ABC Tech Genius	Account Name	Bi	lling City		Phone			
Company Logo	Acme	Ne	ew York		(212) 5	55-5555		
	salesforce.com	Sa	an Francisco		(415) 9	01-7000		
Recycle Bin	ABC Tech Genius	Bo	oulder		(720) 4	44-1837		
	Reports 3 Active Accounts Accounts with last activity > 30 days Account Owners Contact Role Report		Impor Mass	t My Accoun t My Organiz Delete Acco		Contacts		
	Account History Report			fer Accounts				
	Partner Accounts			e Accounts Methodologi	ies			
	Go to Reports »							

- A drop-down menu (1) for list views related to Accounts. You also see links to create list views and edit existing ones. List views are a way for you to browse a set of account records in Salesforce.
- Recent account records (2). You can filter on recently viewed, modified, or created records. You can also click **New** to create an account record.
- A set of links to commonly used account reports (3).
- Account-related tools (4), including import and merge utilities.

Explore Detail Pages

Detail pages show you details about a record, for example details about a particular account.

Let's look at an account detail page.

Navigate to the Accounts tab and click on an account name.

	ABC	Tech Genius	-	
Ľ	T F	IK Yeu Tobe	2 Customize Page E	Edit Layout Printable View Help for this Page 🕜
3	-In- Hide Feed Click t	o add topics 🕜		
-	Post File	🦉 New Task 🛛 More 👻	Sha	Following Followers Show All (1)
	Q Show All Upda	tes 👻		•
	There are no updates.			
4	-	Open Activities [0] Activity History [0]	<u>Opportunities [0]</u> <u>Cases [1]</u> P.	artners [0] Notes & Attachments [0]
	Account Detail	Edit Delete S	Sharing	
5	Account Owner	Erin Tidwell [Change]	Phone	(720) 444-1837
-	Account Name	ABC Tech Genius [View Hierarchy]	Fax	(720) 444-1833
	Parent Account		Website	http://abctechgenius.com/
	 Additional Informat 	ion		
	Туре	Customer	Employees	250
	Industry	Technology	Annual Revenue	
	Description	Technology consulting group, specia the fall.	alizes in CRM. Usually orders custor	ms for large San Francisco tech conference in
	▼ Address Informatio	n		
	E	0010 Main St, Suite 8 Soulder, CO 80301 JSA	Shipping A	ddress

The account details you see, depend on how your administrator configured the page layout and your user permissions for that account. Generally, an account detail page contains these sections and items:

- A profile image (1), if available, and social network links
- Quick links for customizing the page content and layout (2), accessing help resources related to the page, and printing
- A feed (3), where you can add and view comments about a record
- Various links (4) to move around the page or go to different pages or external sites
- Detailed information about the account record (5)

Scroll down below the record details. Related lists group and display links to other records associated with the one you're viewing.

Cont	acts		Ne	w Contact M	erge Con	tacts				Contacts Help
Action	Contact Name			Title	Er	mail			Phone	
Edit Del	Charnice John	stone	,	Accounting	<u>ch</u>	narj@abct	echgenius.com		(720) 444	4-1837
Open Ac	tivities		Ne	w Task New	Event				Oper	Activities Help
Action	Subject		Name	Related To		Task	Due Date	Status	Priority	Assigned To
Edit Del	Meeting with Y	anovic/		ABC Tech Ge	enius		8/27/2015 2:00 PM			Erin Tidwell
Activity H	listory		Lo	g a Call Mail	Merge	Send an E	mail View All		Activ	ity History Help
Action	Subject N	lame	Related To		Task	Due Dat	e Assigned To	Last M	lodified Dat	e/Time
Edit Del	Call		ABC Tech Ge	enius	1	6/9/201	5 Erin Tidwell	6/9/20	15 1:28 PN	1

Access Other Salesforce Apps

Looking for a particular feature? Check out the app menu or App Launcher to see all the Salesforce apps that are available to you.

There are other Salesforce apps that are available to you right from within Salesforce. Other apps include the Salesforce Marketing app, the Service app, and any custom apps for your organization.

Any third-party apps that are connected to your Saleforce org are called connected apps. If your org has connected apps, they appear in the App Launcher. Third-party apps are productivity apps such as Gmail[™] and Microsoft Office 365[™].

Open Another App from the App Launcher in Salesforce Classic

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

Open a Another App in Lightning Experience

Use the App Launcher to navigate between your apps. You can easily switch between apps and access other Salesforce items and features.

Open Another App from the App Launcher in Salesforce Classic

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

Note: These steps work in Salesforce Classic. If you see the App Launcher icon (**…**) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

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

• To open the App Launcher, from the drop-down app menu at the upper-right corner of any Salesforce page, select **App Launcher**.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

EDITIONS

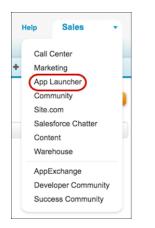
Available in: Salesforce Classic

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

USER PERMISSIONS

To see the App Launcher:

"Use Identity Features"



• In the App Launcher, click the tile for the app that you want.

App Launcher				Quick Find	
Ø	₽	salesforce			
Sales	Service	Work.com	Content		
8	9		ТА		
Salesforce Chatter	Marketing Cloud	Gmail	Test Aloha App		
ТА					
Test Aloha App 2	Google Drive				

Open a Another App in Lightning Experience

Use the App Launcher to navigate between your apps. You can easily switch between apps and access other Salesforce items and features.



To open the App Launcher, on the left side of the navigation bar, click III.

The App Launcher displays all your available Salesforce apps and items that don't appear on the navigation bar. In contrast, the navigation bar displays all the items contained in the app that you're currently using.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To use an app:

 Access to that app as specified in your user profile or permission sets.

			Q	Sear	rch Sa	lesforce										
 Sales	Home	Opportunities	~	Leads	~	Tasks	~	Files	Notes	~	Accounts	~	Contacts	~	Campaigns	~

The App Launcher displays standard Salesforce apps, custom apps, and the connected apps that your Salesforce admin has installed for your convenience. Connected apps are third-party apps, such as Gmail, Google Drive, and Windows365.

			Q Sear	ch Salesforce		+ ? 🕸	• 🔇
	App Launch	her	Q Find an	app or item		AppExchange	
् Qui Setup	E	Sales The world's most popular sales More	F	Service State-of-the-Art On- Demand Cus More	8	Community Salesforce CRM Communities	
ADM > Use > Dat > Em	(Marketing Best-in-class on- demand market More	AN	Another New App	Si	Site.com Build pixel-perfect, data-rich More	>
PLAT > Apj > Fea	8	Salesforce Chatter The Salesforce Chatter social More		Content Salesforce CRM Content	MN	My New App This is my new app. TO DO: Wri More	
> Obj	∽ All Items						
> Pro	Accounts	App Launc	her	Assets	Cal	endar	
> Use	Campaigns	Cases		Chatter	Cor	ntacts	
> Cus	Contracts	Dashboard	s	Data	Del	liveries	_
> Enviro	onments	Custom Ac	count Record Pag	ge L	ightning Page		

When you open a connected app, it opens in a new tab. Be sure to set your popup blocker to allow popups. Otherwise, your connected app doesn't launch.

• Use the Find an app or item box at the top of App Launcher to look for apps or items by name.

For example, start typing the name of the app, such as "Service," and all apps and items containing the string appear as you type.

App Launcher	Q se	\otimes	AppExchange
∽ All Apps			
Service State-of-th Customer S	e-Art On-Demand Service		
✓ All Items			
As <mark>se</mark> ts	Ca <mark>se</mark> s	Mercha	andi <mark>se</mark>
U <mark>se</mark> r Provisioning Requests	Warehou <mark>se</mark> s		

• Drag an app tile from one position to another to sort them by the apps that you use most.

op Laun				
All Apps		Drag the app to a new location to reorder the list.	×	
> }	Sales The world's most popular store automation (SF., Mon	Service State-of-the-Art On-Demand Contorner Service The world's most popular sales force automation (SE, More	<u>8</u>	Community Salesforce CRM Communities
0	Marketing Best-in-class on-demand marketing automation	Si Bite com websites using the d More	8	Salesforce Chatter The Salesforce Chatter social network, including pr More
	Content Salesforce CRM Content			

Don't see what you want? Ask your Salesforce admin if more apps are available.

Search Across Salesforce

Search across Salesforce, including records, Chatter feeds, people, groups, and tasks. Search is available via the Salesforce site, a Salesforce 1 mobile app, or a custom search implementation built on the Salesforce platform.

Search for Records in Lightning Experience Use the search box at the top of every page to search by a specific object or across Salesforce. Smart suggestions in the instant results drop-down help you get to records faster. Search for Records in Salesforce Classic If enabled, use global search, at the top of every page, to search across Salesforce. Refine Search Results in Lightning Experience Use our guidelines for navigating the search results page to quickly find records. Refine Search Results in Salesforce Classic Use our guidelines for sorting and filtering your results to quickly find records. Search Your Feeds in Lightning Experience Search for people, groups, and files across your feeds. Search Your Feeds in Salesforce Classic Search Your Feeds in Salesforce Classic

Search for Records in Lightning Experience

Use the search box at the top of every page to search by a specific object or across Salesforce. Smart suggestions in the instant results drop-down help you get to records faster.

Be as specific as possible when entering search terms to get best, most targeted results. For example, let's say you're looking for John Smith from your sales team. Enter his full name. Or if you're looking for the sales report from March 2015, enter sales report March 2015.

1. When you click into the box, the instant results drop-down presents a list of recent items. Use the suggestions for shortcuts to your top-of-mind records.

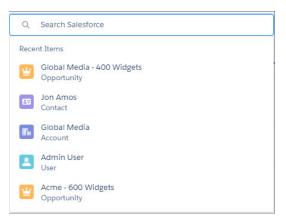
EDITIONS

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

EDITIONS

Available in Lightning Experience

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



2. As you type, the list dynamically updates with suggested matches and scoped searches.

In the instant results drop-down, you can also:

Q	widgets
۹	"widgets" in Salesforce
Q	"widgets" in Opportunities 2
¥	Global Media - 400 Widgets Opportunity
¥	Acme - 600 Widgets Opportunity
¥	salesforce.com - 2,000 Widgets 3 Opportunity - salesforce.com
¥	salesforce.com - 1,000 Widgets Opportunity - salesforce.com
¥	Acme - 200 Widgets Opportunity - Acme

- Search across all searchable objects (1). You can also press Enter for the same results.
- Search within the object you're currently on (2).
- Select a suggested record and navigate directly to the record (3).
- **3.** If you don't see the record that you want, press Enter to see the full search results. You'll land on the **Top Results** page, which shows you the most relevant results from your most frequently used objects.

Sales	Home	Opportunities 🗸 Leads	✓ Tasks ✓ Fi	ies Notes 🗸 A	Accounts 🗸 Contact	5 🗸 More 🔻	
SEARCH RESUL	TS	Accounts 3 Results • Sorted by Relev	ance				
Top Results							
Opportunities		ACCOUNT NAME	ACCOUNT SITE	PHONE		OWNER ALIAS	
Leads		Acme (Sample)			rmendo		
Files		Acme-NY		(212) 555-75	i03 rmendo		
Notes		Acme Inc.		(212) 555-50	003 rmendo		
Accounts		Groups					
Contacts		1 Result					
Campaigns		NAME	LAST	ACTIVITY	MEMBERS	OWNER	
Dashboards		All Acme Wirel	ess 8/29	/2016 4:33 PM	2 Members	Angela Espinoza	
Reports							
Chatter							
Groups		Contacts 1 Result					
People							
Cases			UNT NAME ACCOU		EMAIL		
> Show More		Shelby Cooper Acm	e-NY	(212) 55	55-7503 shelby.coo	per@trainingorg-acme-	ny.com

From this high-level overview, it's easy to home in on what you need. See results for a specific object by selecting it on the left, under **Search Results**. Searchable objects are listed in the same order they appear in the global navigation bar. If you don't see an object that you need under **Search Results**, don't worry, it's close at hand. Select **Show More** to see all objects available to you, listed in alphabetical order.

To sort search results, click column headers or find options under the sort button. If the sort button is disabled, it's because the search results layout doesn't contain any fields that are sortable.

Still can't find a record? Check your spelling and that you entered a full search term. Otherwise, the object or record may not be searchable or you don't have permission to view the record. Ask your admin for assistance.

Search for Records in Salesforce Classic

If enabled, use global search, at the top of every page, to search across Salesforce.

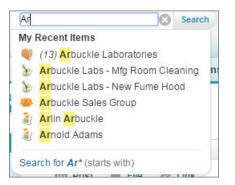
Be as specific as possible when entering search terms to get best, most targeted results. For example, let's say you're looking for John Smith from your sales team. Enter his full name. Or if you're looking for the sales report from March 2015, enter sales report March 2015.

1. Enter your search term.

EDITIONS

Available in Salesforce Classic

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



As you type, notice the drop-down that lists **My Recent Items** and highlights the part of the record name that matches your search term.

2. Press Enter or click Search.

You're taken to the search results page.

Search Results							0	Suided Tour Help fo	or this Page 🍕
C Search Feeds	1 kle		Sea	rch Again 🚺	Options				
Records	2 4000	unts (10+) Show	Filters						
Accounts (10+)	Action Ac	count Name			Region	B	illing Cour	ntry	
ampaigns (2)	Edit Ar	ouckle Laboratories			EMEA	G	reece		
pportunities (0)	Edit An	ouckle Laboratories			EMEA	P	ortugal		
ontacts (1)	- 3 Ar	ouckle Laboratories			EMEA	S	pain		
eads (0)	Edit Ar	ouckle Laboratories			EMEA	S	pain		
eports (0)	Edit Ar	ouckle Laboratories			EMEA	S	witzerland		
iroups (1)	Show More	<u>≻</u> _5							
earch All 4	🆢 Camp	aigns (2)							
_	Action Ca	mpaign Name	Parent Campaig	n Type	Status	Start Date	End Date	Total Responses	Owner Alia
		ouckle Labs - Mfg Ro eaning	om	Advertiseme	ent Planned			0	AUser
		ouckle Labs - New Fu od	ime	Advertiseme	nt Planned			0	AUser
	Cont	acts (1) Show Filt	ers						
	Action Na	me	Account Name	Mobile	Mailing Cit	y Phor	ne Emai	Contact Owne	r Alias
	Edit Mr	Arlin Arbuckle	Arbuckle Laboratories		Oslo			AUser	

On the search results page, you can

- Search Feeds (1) to see posts from your company that match your search terms.
- Use the **Records** view (2) to see a few records for each frequently used object.
- Click an object name in the left search navigation (3) to see results for only that object.
- Click Search All (4) to see the results for more objects.
- Use Show More (5) under an object's search results to see all results for the object.

The order of the objects is based on how frequently you use each object.

If you can't find the record you need right away, try to refine your search. You can either sort results by clicking the headers or filter the results by selecting **Show Filters**.

Still can't find a record? Check your spelling and that you entered a full search term. Otherwise, the object or record may not be searchable or you don't have permission to view the record. Ask your admin for assistance.

Refine Search Results in Lightning Experience

Use our guidelines for navigating the search results page to quickly find records.

See the most relevant results on one page with Top Results

When you perform a search, you land on the Top Results page first. The Top Results search results page lists the most relevant record results for each of your most frequently used objects.

This page is a good choice when you want to review results for a search term but you aren't looking for a specific object type. For example, you search for *Acme Inc.* and look at the Top Results page for accounts, leads, and opportunities. Each person's Top Results page is different depending on which objects they use the most. Use the **View More** link to see more results for an object.

EDITIONS

Available in: Lightning Experience

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

Quickly view results by object

You can also see results for a specific object by clicking the object's name on the left side of the page, under Search Results. Searchable objects are listed in the same order they appear in the navigation bar.

See all available objects under Show More

If you don't see an object listed under Search Results, select **Show More** to see all objects available to you. Searchable objects are listed in alphabetical order.

Sort your results

Sorting results helps you quickly find the information most relevant to you.

On the Top Results page, click column headers on sortable fields to sort by that column.

For more sorting options, view results for a specific object. You can order the results using the sort drop-down. The menu lists all the columns in the search layout, plus an option to sort by **Relevance**. You can also click the column headers.

If the search layout includes all non-sortable fields, the sort button is disabled.

More Guidelines

- Check your spelling and that you entered the full search term. Or, try entering a more specific search term.
- If you recently created or updated the record, wait a few minutes for the record to be indexed. If you can't find your record after 15 minutes, contact your admin.

Search in Salesforce Lightning Experience

Refine Search Results in Salesforce Classic

Use our guidelines for sorting and filtering your results to quickly find records.

When you use the global search bar, you search through all objects and multiple fields types, including custom and long text fields, within a record. If you enter multiple terms, results containing all the search terms are returned, which can be a lot of records! Here are some strategies to find the record that you're looking for after performing a full search.

EDITIONS

Available in: Salesforce Classic

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

Search All

Search defaults to return results for the objects that you use most frequently. To expand the search to other objects, use **Search All**. If you don't have a **Search All** option, global search doesn't have enough information about which objects you use. Your results include all objects until it has more information.

Pin

Hover over and pin important objects to the top of the search results object list. You can always unpin or reorder objects later. Pinning is helpful for objects that you don't use frequently.

Filter

training		Search Cases i	Options	
🏉 Cases (25+)	Show Filters		My Colu	<u>umns</u>

- Use **Options...** to restrict your search to items you own, if available, to exact phrase searches, and to divisions, if your organization uses them.
- Use Show Filters, if available, to filter your search results.
- Use My Columns, if available, to customize which columns display by customizing Selected Fields from the Available Fields.
 - Note: Your admin determines the availability of filter fields and customizable columns in a search layout. If your admin didn't create a search layout or if search layouts aren't available for an object, you can't filter search results or customize the columns in search results. Filters aren't available in Customer Portals or partner portals.

More Guidelines

- Make sure that you are on the right object scope. You can change the scope in the left navigation.
- Check your spelling and that you entered the full search term. Or, try entering a more specific search term.
- If you recently created or updated the record, wait a few minutes for the record to be indexed. If you can't find your record after 15 minutes, contact your admin.
- Search in Salesforce Classic
- Filtering Search Results in Salesforce Classic

Search Your Feeds in Lightning Experience

Search for people, groups, and files across your feeds.

- 1. Enter your search term in the header search box.
- 2. On the search result page, click **FEEDS** to see posts from the All Company feed that include matches on your search term.

EDITIONS

Available in Lightning Experience

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

Search Your Feeds in Salesforce Classic

Search feeds, people, groups, topics, and files across Chatter.

- 1. Enter your search term in the header search box.
- 2. Click Search.

The search results page shows matches across Salesforce, including Chatter. From the search results page, you can further refine your search. For example, to see search results across all Chatter feeds, click **Search Feeds**.

You can also search specific feeds. For example, to find where is person is mentioned in a group, type the person's name in the search box above the group feed.

Example: Watch a Demo: Search in Salesforce Classic

Set Up Your Chatter Profile

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

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

- Note: If your organization doesn't use Chatter, you can still add and edit personal information.
- 1. Click the **Chatter** tab and find the placeholder profile image on the left side of the page. Click *Your* Name next to the placeholder image.
- 2. To update your profile photo, hover over the placeholder image and click Add Photo.
 - Tip: Use a photo of you and not a group of people or a pet. Chatter is a business tool, so choose a photo you don't mind showing to your boss and CEO.

3. To update your contact information, click

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

4. Click Save All.

Explore the Salesforce Setup Menu

Salesforce includes many options for setting up, maintaining, and customizing your organization. If you're a Salesforce administrator or developer, you use the Setup menu frequently.

All setup options are all available from the Setup menu. The way you access the Setup menu depends on which Salesforce experience you're using and on your organization's user interface settings.

- 1. Look at the top of any Salesforce page.
 - If you're using Lightning Experience, click 🔍 , then select Setup Home.
 - If you're using Salesforce Classic and you see Setup in the user interface header, click it.

EDITIONS

Available in Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

- If you're using Salesforce Classic and you don't see Setup in the header, click your name, then select Setup.
- 2. Enter the name of the Setup page, record, or object that you want in the Quick Find box, then select the appropriate page from the menu.
 - Tip: Type the first few characters of a page's name in the Quick Find box. As you type, pages that match your search terms appear in the menu. For example, to find the Language Settings page, type *lang* in the Quick Find box, then select **Language Settings**.

View and Purge the Recycle Bin

The Recycle Bin contains items that were deleted. Salesforce admins can see all deleted data across the entire org. The Recycle Bin is available in the left sidebar on the Home page in Salesforce Classic.

View Items in the Recycle Bin

Choose **My Recycle** from the dropdown list to view just the items you deleted. Admins and users with the "Modify All Data" permission can choose **All Recycle Bin** to view all data that has been deleted for the entire org. In Personal Edition, the All Recycle Bin option shows all your deleted items.

Note: Records in the Recycle Bin don't count against your org's storage usage.

Search for Items in the Recycle Bin

- 1. Choose My Recycle Bin or All Recycle Bin. My Recycle Bin searches for matches only in the items you deleted.
- 2. Enter your search terms. Search terms are treated as separate words with an implied AND between them. For example, searching for *bob jones* returns items with *bob* and *jones* together but not *bob smith* whose email address is *bsmith@jones.com*. An implied wildcard is appended to your search terms so searching for *bob* returns any *bob* or *bobby*. Searches look for matches in the field displayed in the Name column of the Recycle Bin such as lead Name, Case Number, Contract Number, Or Product Name.

Note: Some search features, including stemming and synonyms, are not available in the Recycle Bin search.

3. Click Search.

Restore Items in the Recycle Bin

You can restore items by checking the box next to those items and clicking **Undelete**. To restore all deleted items, check the box in the column header and then click **Undelete**.

When you undelete a record, Salesforce restores the record associations for the following types of relationships:

- Parent accounts (as specified in the Parent Account field on an account)
- Parent cases (as specified in the Parent Case field on a case)
- Master solutions for translated solutions (as specified in the Master Solution field on a solution)
- Managers of contacts (as specified in the Reports To field on a contact)



Available in: Salesforce Classic

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

USER PERMISSIONS

To view and recover your deleted records:

• "Read" on the records in the Recycle Bin

To view and recover records deleted by other users:

• "Modify All Data"

To recover deleted public tags:

• "Tag Manager"

To purge the Recycle Bin:

"Modify All Data"

- Products related to assets (as specified in the Product field on an asset)
- Opportunities related to quotes (as specified in the Opportunity field on a quote)
- All custom lookup relationships
- Relationship group members on accounts and relationship groups, with some exceptions
- Tags
- An article's categories, publication state, and assignments

Note: Salesforce only restores lookup relationships that have not been replaced. For example, if an asset is related to a different product prior to the original product record being undeleted, that asset-product relationship is not restored.

Purge the Recycle Bin

Deleted records remain in the recycle bin for 15 days, and can be restored during that time. To permanently remove your deleted items before the 15-day period, administrators and users with the "Modify All Data" permission, can click **Empty your Recycle Bin** or **Empty your organization's Recycle Bin**. After 15 days, deleted items are purged from the recycle bin, and once purged, they can't be recovered.

View and Display FAQ

Common questions around popup windows, buttons, links, and other display elements on Salesforce pages.

What's the Collapsible Sidebar?

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

Why Can't I See Some Features?

You learn about Salesforce features in our help documentation and training videos. However, sometimes you can't seem to find or access these features in your Salesforce org.

Why Can't I View Salesforce Popup Windows Such as Lookup Dialogs and Help Pages?

Test your browser's popup blocker settings. If the settings are configured for maximum security, you can't view any popup windows within Salesforce, including popups that provide necessary functionality.

Why Can't I See Some Buttons and Links?

Buttons and links only display for users who have the appropriate permissions to use them.

Why Did My Data Disappear When I Pressed the Backspace Key While Editing a Record in Salesforce Classic?

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

Can I Change or Delete the List of Entries That Appears When I Edit a Text Field in Salesforce Classic?

No. These auto-complete entries that appear when you are editing certain text fields are a feature of Internet Explorer.

Why Am I Getting an Error Message?

When you're working in Salesforce, you can occasionally get an error message. Typically, an error message appears when you try to view, edit, or delete information to which you don't have access.

What's the Collapsible Sidebar?

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

Click the edge of the sidebar to open or close the sidebar as needed.

Home Chatter	Profile	Groups	Files	Leads	Accounts	Contacts
Create New			Ho			
Shortcut		Vie	w: All A	ccounts		▼ Go!

The options in your sidebar vary depending on the features that are available in your org and whether your administrator has customized the page layout.

Why Can't I See Some Features?

You learn about Salesforce features in our help documentation and training videos. However, sometimes you can't seem to find or access these features in your Salesforce org.

Here are some reason why you can't find or access a particular feature or object.

- You don't have the required permissions and access settings
- Your company renamed some standard objects and fields or created their own custom objects and fields
- The feature you're looking for isn't included in your company's Salesforce edition or Salesforce experience
- You have to first adjust your custom page views or install external apps to enable the feature

Why Can't I View Salesforce Popup Windows Such as Lookup Dialogs and Help Pages?

Test your browser's popup blocker settings. If the settings are configured for maximum security, you can't view any popup windows within Salesforce, including popups that provide necessary functionality.

For example, maximum security settings block calendar popup for choosing a date on an activity, lookup dialogs for selecting a record, and Help pages.

To test your popup settings:

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

2. Click Preview Reminder Alert.

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

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

Why Can't I See Some Buttons and Links?

Buttons and links only display for users who have the appropriate permissions to use them.

EDITIONS

EDITIONS

Classic

Available in: Salesforce

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

Available in: both Salesforce Classic and Lightning Experience

Available in: All editions

For example, users who do not have the "Delete" permission on opportunities do not see the **Delete** button on an opportunity detail page nor do they see the **Del** link on an opportunity related list.

Why Did My Data Disappear When I Pressed the Backspace Key While Editing a Record in Salesforce Classic?

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

Can I Change or Delete the List of Entries That Appears When I Edit a Text Field in Salesforce Classic?

No. These auto-complete entries that appear when you are editing certain text fields are a feature of Internet Explorer.

The browser remembers text that you entered previously and provides a list of those entries for you to automatically complete the field. If you would like to turn off this feature, click **Tools** on your browser's menu bar. Select **Internet Options**, click the **Content** tab, and then choose the **AutoComplete** button to change your browser's settings.

Why Am I Getting an Error Message?

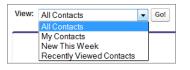
When you're working in Salesforce, you can occasionally get an error message. Typically, an error message appears when you try to view, edit, or delete information to which you don't have access.

Click your browser's Back button to return to the previous page. If you feel you have incorrectly received an error, click **Help & Training** at the top of any page. Select **Contact Support** > **Open a Case**, or select the My Cases tab to submit your issue directly to Customer Support.

Tips for New Users

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

• When you click on an object to find your data, you don't see a full list of your existing records. Salesforce keeps those tucked out of view until you manually recall them, in case you want to choose a subset of the full list. Choose an option within *View*, and click **Go!**



EDITIONS

Available in: Salesforce Classic

Available in: All Editions

• *Related lists* are links featured at the bottom of object pages. Related lists provide quick access to other related objects. This feature adds a lot of value, because it gives you fast access to information. It means less navigation and can speed up your workflow. In the Accounts object, your related lists can look something like this:

Changel Hierarchvl	Phone Fax Website Prospect Rating Zone	
Hierarchy	Website Prospect Rating 🥥	http://www.ABCLabs.net
	Prospect Rating 🤅	9 Warm
	Zone 🤇	9
	Zone	9
	Employees	120
	Annual Revenue	USD 7,500,000.00
	Support Plan Expiration	7/2/2014
	Date	
035	Shipping Address	54 Park Drive San Jose, CA 95035 USA
	035	Date (

Salesforce delivers the application with some standard related lists, but administrators can also customize some related list items.

- Our help and training materials probably mention some features that your company hasn't enabled, or that your permissions profile doesn't allow you to access. To find out more about a feature, contact the Salesforce administrator at your company. Not sure who that is? Reach out to the person at your company who introduced you to Salesforce.
- Save your work! It's easy to spend a lot of time updating the fields in a record and then to navigate away from that screen without saving. Make a habit of seeking out the save button before clicking away through another page element.

Verify Your Identity

Use identity verification tools to secure and protect your data from unauthorized access.

Methods for Verifying Your Identity

Identity verification tools, like Salesforce Authenticator, one-time password generators, and text messages help to protect your Salesforce data and account from unauthorized access.

Salesforce Authenticator

Welcome to the all-new Salesforce Authenticator mobile app! Version 2 is a two-factor authentication app for your mobile device, adding an extra layer of security to protect your Salesforce account and data.

Verify Your Identity with a One-Time Password Generator App or Device

Connect a one-time password generator app, such as Salesforce Authenticator or Google Authenticator, to verify your identity. The app generates a verification code, sometimes called a "time-based one-time password".

Verify Your Identity with a Temporary Code

When you can't access the device you usually use for two-factor authentication, ask your Salesforce admin to give you a temporary identity verification code. The code is valid for 1 to 24 hours. Your admin sets the expiration time, but you can expire the code early if you no longer need it.

Troubleshoot Login Issues

Can't log in? Forgot your username or password, or you're locked out from too many login attempts? To resolve login problems, try these solutions.

Methods for Verifying Your Identity

Identity verification tools, like Salesforce Authenticator, one-time password generators, and text messages help to protect your Salesforce data and account from unauthorized access.

When you log in to Salesforce from a browser or application that we don't recognize, and your IP address is outside a trusted IP range, you're prompted to verify your identity.

Salesforce asks you to verify your identity using one of the following verification methods.

Salesforce Authenticator Mobile App

If you connected the Salesforce Authenticator app (version 2 or later) to your account, use the app to verify your Salesforce account activity. Salesforce sends a push notification to your mobile device. When you get the notification, open the app, verify the activity details, and tap **Approve** on your mobile device.

U2F Security Key

If you registered a U2F security key that is associated with your account, use the security key to verify your Salesforce account activity. Salesforce prompts you to insert the security key into your computer's USB port.

One-Time Password Generator App

If you connected an authenticator app (like Salesforce Authenticator or Google Authenticator) to your account, use the mobile app to generate a verification code. This type of code is sometimes called a "time-based one-time password." The code value changes periodically.

SMS Text Message

If you have a verified mobile number associated with your account, you receive a verification code in a text message sent to your phone. If you don't have a verified mobile number, you're prompted to register one when you log in to Salesforce. Registering your mobile phone number verifies it and enables this method when you're challenged in the future. If your mobile number changes, contact your Salesforce admin.

Email

Salesforce sends a verification code in an email to the address associated with your account. The code expires after 24 hours.

The identity verification page includes a "Don't ask again" option, which is selected by default. If you leave the option selected and click **Verify**, Salesforce doesn't ask you to verify your identity again when you log in from the same browser or application. Exceptions are if you clear browser cookies, set your browser to delete cookies, or browse in private or incognito mode. In these cases, you're prompted to verify your identity every time you log in to Salesforce from an IP address that's not defined as trusted for your org.

Note: When you log in from a public or shared device, deselect **Don't ask again**. Deselecting this option ensures that subsequent users have to verify their identity when they log in from that device.

EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Salesforce Authenticator

Welcome to the all-new Salesforce Authenticator mobile app! Version 2 is a two-factor authentication app for your mobile device, adding an extra layer of security to protect your Salesforce account and data.

Salesforce Authenticator mobile app (version 2 or later) supports two types of connected accounts: standard accounts and code-only accounts. Standard accounts feature push notifications, location-based automated verifications, and verification codes for two-factor authentication. Code-only accounts provide only verification codes.

What Is Two-Factor Authentication?

We all want to keep our online accounts and data secure. Two-factor authentication is a great way to do just that. Two-factor authentication means that you have to have two things, or two *factors*, to access your account. The first factor is something you know, like your username and password combination. The second is something you have, like a mobile device with a security app installed. That second factor—the mobile device with a security app—adds an extra layer of protection to your account. Even if hackers steal your password, they can't log in, because they don't have your mobile device with Salesforce Authenticator installed on it.

Get the Salesforce Authenticator Mobile App (Version 2 or Later)

Salesforce Authenticator is an app that you download and install on your mobile device.

Requirements for Salesforce Authenticator (Version 2 or Later)

The Salesforce Authenticator mobile app is supported on various mobile platforms, with some device, operating system, and mobile browser requirements. An Internet connection is necessary to communicate with Salesforce for user verifications of account activity and location-based automated verifications. Verification codes (time-based one-time passwords, or TOTPs) can be generated without an Internet connection on the mobile device.

Salesforce Authenticator (Version 2 or Later) Accessibility Considerations

Salesforce Authenticator is designed with accessibility in mind and delivers a fully accessible mobile experience for all individuals, including users working with screen readers. Unlike the full Salesforce site, Salesforce Authenticator doesn't require accessibility mode to give users working with assistive devices a fully accessible experience.

Locale and Language Support for Salesforce Authenticator (Version 2 or Later)

Salesforce Authenticator works with almost all Salesforce supported locales and the fully supported end-user languages. Salesforce Help includes a list of supported locales and languages. Languages that are read right to left, including Arabic and Hebrew, aren't supported in this release.

Connect an Account to Salesforce Authenticator (Version 2 or Later)

Connect your Salesforce account to the Salesforce Authenticator mobile app to use the app for two-factor authentication. In some orgs, you're prompted to connect your account as you log in. In other orgs, you connect the account through your personal settings.

Back Up Your Connected Accounts in the Salesforce Authenticator Mobile App

You can back up your Connected Accounts in the Salesforce Authenticator mobile app. If you lose, damage, or replace your mobile device, you can restore your Connected Accounts on another mobile device.

Restore Connected Accounts in the Salesforce Authenticator Mobile App

If you've backed up your Connected Accounts in the Salesforce Authenticator mobile app, you can restore them on another mobile device.

EDITIONS

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: **Group, Professional, Enterprise, Performance, Unlimited, Developer**, and **Contact Manager** Editions

Remove an Account from Salesforce Authenticator (Version 2 or Later)

When you no longer want to use the app for two-factor authentication, remove your Salesforce account from the Salesforce Authenticator mobile app. Before you remove an account from the Salesforce Authenticator app on your mobile device, make sure that you don't lose access to your Salesforce account. Either ask your Salesforce admin to disable the two-factor authentication requirement from your account, or make sure that you have another two-factor authentication method available.

Verify Account Activity with Salesforce Authenticator (Version 2 or Later) for Two-Factor Authentication

If your org settings require you to complete two-factor authentication when you log in or access restricted resources in Salesforce, use the Salesforce Authenticator mobile app. You use the app to verify identifying details for your logins and other account activity. Using the app to verify account activity satisfies the two-factor authentication requirement.

Block Unrecognized Account Activity with Salesforce Authenticator (Version 2 or Later)

If you get a notification from the Salesforce Authenticator mobile app about account activity you don't recognize, use the app to block the activity. You can also flag the blocked activity for your Salesforce admin.

Automate Two-Factor Authentication from a Trusted Location with Salesforce Authenticator (Version 2 or Later)

Enable location services in the Salesforce Authenticator mobile app, and then use the app to automate two-factor authentication from a trusted location. Examples of trusted locations can include your home or office.

Stop Location-Based Automated Verifications in Salesforce Authenticator (Version 2 or Later)

You can remove a location from your list of trusted locations to turn off automated verification from there.

What Is Two-Factor Authentication?

We all want to keep our online accounts and data secure. Two-factor authentication is a great way to do just that. Two-factor authentication means that you have to have two things, or two *factors*, to access your account. The first factor is something you know, like your username and password combination. The second is something you have, like a mobile device with a security app installed. That second factor—the mobile device with a security app—adds an extra layer of protection to your account. Even if hackers steal your password, they can't log in, because they don't have your mobile device with Salesforce Authenticator installed on it.

Many mobile authenticator apps generate verification codes that expire after a certain amount of time. When you log in to an online account that requires two-factor authentication, you enter the code along with your username and password. Salesforce Authenticator also generates codes for whenever you need them, but version 2 of the app introduces new features for added convenience, without sacrificing security.

When someone tries to log in or access restricted online data in your account, Salesforce sends a notification to your mobile device. You open the Salesforce Authenticator app to see details of the online activity. After you check the details, you can tap **Approve** to verify that the activity belongs

EDITIONS

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: **Group, Professional, Enterprise, Performance, Unlimited, Developer**, and **Contact Manager** Editions

to you. If you don't recognize the activity, you tap **Deny** to block it. You can also flag the blocked activity for your Salesforce admin.

When you enable location services for Salesforce Authenticator, you unleash even more powerful features. If you're in your home or office, for example, you can tell Authenticator to verify your activities automatically from that trusted location. Automation gives you the extra security of two-factor authentication, and you don't even have to take your phone out of your pocket.

Before you can use Salesforce Authenticator for two-factor authentication, you connect the app to your online account. In Salesforce, you can connect the app to your account in your personal settings. Connecting the app doesn't mean that you're required to use two-factor authentication every time you log in. Your admin sets up a two-factor authentication requirement for you in keeping with your company's security policies. If your admin requires two-factor authentication before you connect Salesforce Authenticator to your account, you're prompted to connect the app the next time you log in.

Get the Salesforce Authenticator Mobile App (Version 2 or Later)

Salesforce Authenticator is an app that you download and install on your mobile device.

New Installations

You can download and install the Salesforce Authenticator mobile app from Google Play or the App Store to supported Android and iOS devices.

After you install the app, launch it from your home screen and connect it to your Salesforce account. In some orgs, you're prompted to connect the app during login. Otherwise you connect the app through your personal settings in Salesforce.

Updating from Salesforce Authenticator Version 1

If you already have version 1 installed on your mobile device, download the update from the App Store or Google Play. The update preserves the connected accounts you already have in the app. These accounts are code-only accounts that generate verification codes but don't receive push notifications or allow location-based automated verifications. Code-only accounts appear on your Connected Accounts list without a > at the far right of the account name row, and there's no account detail page. The verification codes in these code-only accounts are valid until you connect the new

version 2 functionality to your Salesforce account via your personal settings. After you connect the new version, your account gives you full Salesforce Authenticator version 2 functionality: push notifications, location-based automated verifications, and verification codes.

Requirements for Salesforce Authenticator (Version 2 or Later)

The Salesforce Authenticator mobile app is supported on various mobile platforms, with some device, operating system, and mobile browser requirements. An Internet connection is necessary to communicate with Salesforce for user verifications of account activity and location-based automated verifications. Verification codes (time-based one-time passwords, or TOTPs) can be generated without an Internet connection on the mobile device.

Supported Devices and Browsers

Salesforce Authenticator is supported in portrait orientation in these environments.

Salesforce Authenticator App	Supported Devices	Supported Mobile OS
iOS, v2 or later	iPhone 5 or later models	iOS 8 or later
Android, v2 or later	Android phones	Android 4.2 or later

EDITIONS

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager Editions

EDITIONS

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager Editions

For optimal Salesforce Authenticator performance, we recommend keeping your mobile device's operating system updated and upgrading to a late model device as allowed by your mobile plan. Future Salesforce versions might require removing support for older operating systems, and sometimes newer operating system releases don't perform well on older devices.

Salesforce Editions and Licenses

These Salesforce editions and user license types allow the use of Salesforce Authenticator for identity verification and two-factor authentication.

Salesforce Editions

• Group Edition

Database.com Edition isn't supported.

- Professional Edition
- Enterprise Edition
- Performance Edition
- Unlimited Edition
- Developer Edition
- Contact Manager Edition

User License Types

- Salesforce users
- Salesforce Platform and Salesforce users
- Customer Community, Customer Community Plus, and Partner Community external users
- Portal users who are a member of a Salesforce community

These user license types aren't supported: portal users (unless a member of a Salesforce community), Database.com users, Sites and Site.com users, Data.com users, and Work.com users.

Wireless Connection

A Wi-Fi or cellular network connection is needed to communicate with Salesforce. For cellular connections, a 3G network or faster is required. For the best performance, we recommend using Wi-Fi or LTE. Salesforce Authenticator generates valid verification codes when your device is offline. You can also view your activity history and list of trusted locations when the device is offline.

Salesforce Authenticator (Version 2 or Later) Accessibility Considerations

Salesforce Authenticator is designed with accessibility in mind and delivers a fully accessible mobile experience for all individuals, including users working with screen readers. Unlike the full Salesforce site, Salesforce Authenticator doesn't require accessibility mode to give users working with assistive devices a fully accessible experience.

Check your mobile device's documentation for more information about using a screen reader.

Locale and Language Support for Salesforce Authenticator (Version 2 or Later)

Salesforce Authenticator works with almost all Salesforce supported locales and the fully supported end-user languages. Salesforce Help includes a list of supported locales and languages. Languages that are read right to left, including Arabic and Hebrew, aren't supported in this release.

Connect an Account to Salesforce Authenticator (Version 2 or Later)

Connect your Salesforce account to the Salesforce Authenticator mobile app to use the app for two-factor authentication. In some orgs, you're prompted to connect your account as you log in. In other orgs, you connect the account through your personal settings.

If you're prompted to connect Salesforce Authenticator to your Salesforce account as you log in, follow the onscreen instructions. To connect the app from your personal settings in Salesforce, log in to your account, then follow these steps.

1. Download and install version 2 or later of the Salesforce Authenticator app for the type of mobile device you use. For iPhone, get the app from the App Store. For Android devices, get the app from Google Play.

If you previously installed version 1 of Salesforce Authenticator on your mobile device, you can update the app to version 2 through the App Store or Google Play. The update preserves any connected accounts you already have in the app. These accounts are code-only accounts that generate verification codes but don't receive push notifications or allow location-based automated verifications. If you have a code-only account for the username you used for your current login to Salesforce, swipe left in the app to remove that username before proceeding.

EDITIONS

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager Editions

In the following steps, you connect the account for that username again. The new connected account gives you full Salesforce Authenticator version 2 functionality: push notifications, location-based automated verifications, and verification codes.

- 2. From your personal settings, enter *Advanced User Details* in the Quick Find box, then select **Advanced User Details**. No results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**.
- 3. Find App Registration: Salesforce Authenticator and click Connect.
- 4. For security purposes, you're prompted to log in to your account.
- 5. Open the Salesforce Authenticator app on your mobile device.

If you're opening the app for the first time, you see a tour of the app's features. Take the tour, or go straight to adding your Salesforce account to the app.

6. In the app, tap + to add your account.

The app generates a unique two-word phrase.

7. Back in your browser, enter the phrase in the Two-Word Phrase field.

8. Click Connect.

If you previously connected an authenticator app that generates verification codes to your account, you sometimes see an alert. Connecting version 2 or later of the Salesforce Authenticator mobile app invalidates the codes from your old app. When you need a verification code, get it from Salesforce Authenticator from now on.

9. In the Salesforce Authenticator app on your mobile device, you see details about the account you're connecting. To complete the account connection, tap **Connect** in the app.

To help keep your account secure, we send you an email notification whenever a new identity verification method is added to your Salesforce account. You get the email whether you add the method or your Salesforce admin adds it on your behalf.

Back Up Your Connected Accounts in the Salesforce Authenticator Mobile App

You can back up your Connected Accounts in the Salesforce Authenticator mobile app. If you lose, damage, or replace your mobile device, you can restore your Connected Accounts on another mobile device.

You can enable backups in the following ways:

- Tap the Notifications icon (
) in the upper right corner, then tap **Enable Backups**.
- Tap the Settings icon (
) in the upper left corner, then tap **Back up accounts**.

After you enable backups, complete the backup process by verifying your mobile number and setting a four-digit passcode.

- 1. When prompted, enter your mobile number and tap Send.
- 2. Salesforce Authenticator sends you a text message with a link. Tap the link in the text message.
- 3. Authorize your mobile device to open the Salesforce Authenticator mobile app. This process is different on Android and iOS devices.

Operating System	Process
Android	If prompted to select which app to open the link with, tap Salesforce Authenticator from the list.
	If your web browser opens, tap Open Salesforce Authenticator .
iOS	When asked for permission to open Salesforce Authenticator, tap Open to approve.

The Salesforce Authenticator app opens, completing the mobile number verification process.

4. Set your four-digit passcode. This passcode lets you restore your accounts on a new device.

To change or update your mobile number, in the Settings menu, tap **Verified number**. Enter a new mobile number and repeat the verification process.

To change your passcode, in the Settings menu, tap Change backup passcode. Enter a new passcode.

Restore Connected Accounts in the Salesforce Authenticator Mobile App

If you've backed up your Connected Accounts in the Salesforce Authenticator mobile app, you can restore them on another mobile device.

Before you restore your accounts, keep these things in mind.

- Connected Accounts are active on only one device at a time. If you restore your Connected Accounts on a second device, you can no longer access them from the previous device.
- To restore your Connected Accounts on a new device, restore your accounts **before** creating new Connected Accounts on the new device. You can't restore Connected Accounts from a backup after creating new Connected Accounts.
- 1. From the Let's Get Started screen, tap Restore from Backup.
- 2. When prompted, enter your mobile number and tap Send.
- 3. Salesforce Authenticator sends you a text message with a link. Tap the link in the text message.
- 4. Authorize your mobile device to open the Salesforce Authenticator mobile app. This process is different on Android and iOS devices.

Operating System	Process
Android	If prompted to select which app to open the link with, tap Salesforce Authenticator from the list.
	If your web browser opens, tap Open Salesforce Authenticator .
iOS	When asked for permission to open Salesforce Authenticator, tap Open to approve.

The Salesforce Authenticator app opens, completing the mobile number verification process.

5. In the Salesforce Authenticator app, enter your passcode.

When you see your Connected Accounts, the restoration process is complete.

Remove an Account from Salesforce Authenticator (Version 2 or Later)

When you no longer want to use the app for two-factor authentication, remove your Salesforce account from the Salesforce Authenticator mobile app. Before you remove an account from the Salesforce Authenticator app on your mobile device, make sure that you don't lose access to your Salesforce account. Either ask your Salesforce admin to disable the two-factor authentication requirement from your account, or make sure that you have another two-factor authentication method available.

- Begin in a web browser, in your Salesforce account. 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. Find App Registration: Salesforce Authenticator, and click Disconnect.
- 3. Open the Salesforce Authenticator app on your mobile device.
- 4. In the app list of connected accounts, find the account you want to remove.
- 5. Swipe left on the account username.
- 6. Tap **Remove** or **Delete**, whichever appears. A confirmation dialog appears.
- 7. To confirm the removal of the account, tap **Remove**.

EDITIONS

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager Editions

Verify Account Activity with Salesforce Authenticator (Version 2 or Later) for Two-Factor Authentication

If your org settings require you to complete two-factor authentication when you log in or access restricted resources in Salesforce, use the Salesforce Authenticator mobile app. You use the app to verify identifying details for your logins and other account activity. Using the app to verify account activity satisfies the two-factor authentication requirement.

Before you can use the app for two-factor authentication, connect the app to your account. When you do something that requires verification in Salesforce, you receive a notification from the Salesforce Authenticator app on your mobile device.

- Respond to the notification by opening the Salesforce Authenticator app on your mobile device. The app displays details of your account activity, including your username, the service you're trying to access (such as Salesforce), and information about the device used for the activity. If location services are enabled and available, the app shows your current location. Owing to the nature of geolocation technology, the accuracy of geolocation fields (for example, street address, country, city) can vary.
- 2. Check the details.
- **3.** If you recognize the details, tap **Approve** on your mobile device. In Salesforce, you're logged in or granted access to the desired resource.

EDITIONS

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager Editions

Block Unrecognized Account Activity with Salesforce Authenticator (Version 2 or Later)

If you get a notification from the Salesforce Authenticator mobile app about account activity you don't recognize, use the app to block the activity. You can also flag the blocked activity for your Salesforce admin.

- Respond to the notification by opening the Salesforce Authenticator app on your mobile device. The app displays details of your account activity, including your username, the service you're trying to access (such as Salesforce), and information about the device used for the activity. If location services are enabled and available, the app shows the user's current location. Owing to the nature of geolocation technology, the accuracy of geolocation fields (for example, street address, country, city) can vary.
- 2. Check the details.
- **3.** If you don't recognize the details, tap **Deny** on your mobile device. The app asks you what to do about the unrecognized activity.
- 4. To prevent unauthorized access to your account and alert your Salesforce admin of the potential security breach, tap Block Activity and Flag. To prevent access to your account without flagging, tap Just Block Activity. If you tapped Deny by mistake, tap Cancel to go back and verify the activity.

EDITIONS

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager Editions

Automate Two-Factor Authentication from a Trusted Location with Salesforce Authenticator (Version 2 or Later)

Enable location services in the Salesforce Authenticator mobile app, and then use the app to automate two-factor authentication from a trusted location. Examples of trusted locations can include your home or office.

Before you can use the app for two-factor authentication, connect the app to your account. The first time you use Salesforce Authenticator to verify your account activity, the app asks for access to your location. Either respond to allow access, or go later to your mobile device's settings to allow Salesforce Authenticator to access your location. Your mobile device's location data does not leave the app. Allowing access to your location lets you automate two-factor authentication when you're working at your office, home, or other trusted location.

1. Respond to a notification from Salesforce Authenticator by opening the app on your mobile device.

The app displays details of your account activity, including your username, the service you're trying to access (such as Salesforce), and information about the device used for the activity. If location services are enabled and available, the app shows your current location. Owing to the nature of geolocation technology, the accuracy of geolocation fields (for example, street address, country, city) can vary.

- 2. Check the details.
- 3. If you recognize the details, and you're in a location you trust, like your office or home, switch on Always verify from here.

4. Tap Approve.

In Salesforce, you're logged in or granted access to the desired resource. The next time you take the same action from the same location, the Salesforce Authenticator app automatically verifies the activity for you. You need your mobile device with you, but you don't have to respond to an app notification.

EDITIONS

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager Editions

Stop Location-Based Automated Verifications in Salesforce Authenticator (Version 2 or Later)

You can remove a location from your list of trusted locations to turn off automated verification from there.

- 1. Open the Salesforce Authenticator app on your mobile device.
- 2. In your Connected Accounts list, tap your username to go to the account detail page.
- 3. In Trusted Locations, tap View All.
- 4. Swipe left on the location you want to stop trusting.
- 5. Tap **Delete** or **Stop Trusting**, whichever appears. The app asks you to confirm that you want to turn off automated verifications from this location.
- 6. Tap Stop Trusting.

EDITIONS

Salesforce Authenticator setup available in: both Salesforce Classic and Lightning Experience

Two-factor authentication with Salesforce Authenticator available in: Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager Editions

Verify Your Identity with a One-Time Password Generator App or Device

Connect a one-time password generator app, such as Salesforce Authenticator or Google Authenticator, to verify your identity. The app generates a verification code, sometimes called a "time-based one-time password".

Available in: Both Salesforce Classic and Lightning Experience

EDITIONS

Available in all editions

If your company requires two-factor authentication for increased security when you log in, access connected apps, reports, or dashboards, use a code from the app. If you're required to use two-factor authentication before you have an app connected, you're prompted to connect one the next time you log in to Salesforce.

- 1. Download the supported authenticator app for your device type. You can use any authenticator app that supports the time-based one-time password (TOTP) algorithm (IETF RFC 6238), such as Salesforce Authenticator for iOS, Salesforce Authenticator for Android, or Google Authenticator.
- 2. From your personal settings, enter *Advanced User Details* in the Quick Find box, then select **Advanced User Details**. No results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**.
- 3. Find App Registration: One-Time Password Generator and click Connect.

If you're connecting an authenticator app other than Salesforce Authenticator, use this setting. If you're connecting Salesforce Authenticator, use this setting if you're only using its one-time password generator feature (not the push notifications available in version 2 or later).

Note: If you're connecting Salesforce Authenticator so that you can use push notifications, use the App Registration: Salesforce Authenticator setting instead. That setting enables both push notifications and one-time password generation.

You can connect up to two authenticator apps to your Salesforce account for one-time password generation: Salesforce Authenticator and one other authenticator app.

- 4. For security purposes, you're prompted to log in to your account.
- 5. Using the authenticator app on your mobile device, scan the QR code.

Alternatively, click **I Can't Scan the QR Code** in your browser. The browser displays a security key. In the authenticator app, enter your username and the key displayed.

6. In Salesforce, enter the code generated by the authenticator app in the Verification Code field. The authenticator app generates a new verification code periodically. Enter the current code.

7. Click Connect.

To help keep your account secure, we send you an email notification whenever a new identity verification method is added to your Salesforce account. You get the email whether you add the method or your Salesforce admin adds it on your behalf.

Verify Your Identity with a Temporary Code

When you can't access the device you usually use for two-factor authentication, ask your Salesforce admin to give you a temporary identity verification code. The code is valid for 1 to 24 hours. Your admin sets the expiration time, but you can expire the code early if you no longer need it.

If your Salesforce admin has given other users permission to help you with two-factor authentication, they can give you a temporary code. Your company's Help Desk or support staff, for example, sometimes has this permission.

The temporary code is for two-factor authentication only. It isn't valid for identity verification when you log in from a browser or app we don't recognize.

1. Ask your Salesforce admin (or someone designated by your admin) for a temporary identity verification code.

Your admin sets how long the code is valid. You can use the code multiple times until it expires. You get an email notification whenever your admin generates a temporary code for you.

- 2. Enter the temporary code where prompted in the identity verification screen.
- 3. If you don't need the code any more and it's still valid, expire the code.
 - a. 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**.
 - **b.** Find Temporary Verification Code and click **Expire Now**.

Troubleshoot Login Issues

Can't log in? Forgot your username or password, or you're locked out from too many login attempts? To resolve login problems, try these solutions.

Your Salesforce admin sets password policies for your org. These policies determine how many times you can attempt to log in, how long you're locked out, and what your password requirements are.

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

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

- Forgot your password? Retrieve it.
- Locked out? Wait until the lockout period expires and try again, or contact your Salesforce admin.
- Password expired? We prompt you to change your password.
- Accessing Salesforce from outside a trusted IP range, using a new browser or app? We prompt you to verify your identity.

EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

• What does Use Custom Domain on the login page mean? If your Salesforce admin created a custom domain for your org, click **Use Custom Domain** to provide the domain name and log in.

A custom domain is in the form https://universalcontainers.my.salesforce.com, where universalcontainers is a name provided by your admin.

Reset Your Forgotten Password

If you forgot your password, you can easily reset it using the forgot password link on the login page. All you need is your username.

Reset Your Security Token

When you access Salesforce from an IP address that's outside your company's trusted IP range using a desktop client or the API, you need a security token to log in. A security token is a case-sensitive alphanumeric code that you append to your password or enter in a separate field in a client application.

Update Your Token in Salesforce Outlook Edition

After you reset your security token in Salesforce, you can update your token in Salesforce Outlook.

Update Your Token in Connect Offline, Connect for Office, and Data Loader

After you received your new Salesforce security token, you can update your token in Connect Offline, Connect for Office, and Data Loader.

Grant Login Access

If you need help resolving a problem, you can grant login access to your account to a Salesforce administrator or a support representative.

Reset Your Forgotten Password

If you forgot your password, you can easily reset it using the forgot password link on the login page. All you need is your username.

Watch a Demo (Salesforce Classic) (33 seconds)

When you log in to Salesforce from a browser or application that we don't recognize, and your IP address is outside a trusted IP range, you're prompted to verify your identity.

- 1. On the login page, click the forgot password link.
- 2. Enter your username and click **Continue**. An email containing instructions to reset your password is sent to the address specified in your Salesforce personal settings.
- 3. Within 24 hours, click the link provided in the email, answer your security question, and click **Continue**. (The link in the email can be used only once, and expires after 24 hours.)
- 4. When prompted, enter a new password.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

Reset Your Security Token

When you access Salesforce from an IP address that's outside your company's trusted IP range using a desktop client or the API, you need a security token to log in. A security token is a case-sensitive alphanumeric code that you append to your password or enter in a separate field in a client application.

Your security token isn't displayed in your settings or profile.

If your admin assigned you the "Two-Factor Authentication for API Logins" permission, use the code generated by an authenticator app, such as Salesforce Authenticator, for the security token value.

- 1. From your personal settings, enter *Reset* in the Quick Find box, then select **Reset My** Security Token.
- 2. Click **Reset Security Token**. The new security token is sent to the email address in your Salesforce personal settings.

A new security token is emailed to you when you reset your password. Or you can reset your token separately.

Tip: Before you access Salesforce from a new IP address, we recommend that you get your security token from a trusted network using **Reset My Security Token**.

Update Your Token in Salesforce Outlook Edition

After you reset your security token in Salesforce, you can update your token in Salesforce Outlook.

Your security token isn't displayed in your settings or profile. A new security token is emailed to you when you reset your password. Or you can reset your token separately.

If your admin assigned you the "Two-Factor Authentication for API Logins" permission, use the code generated by an authenticator app, such as Salesforce Authenticator, for the security token value.

- 1. In Outlook, go to Tools > Salesforce Options.
- 2. In the password window, enter your password and security token, with the security token added to the end of your password. For example, *mypasswordXXXXXXXXX*.
- 3. To test that you correctly entered your password and token, click Verify.
- 4. Click OK.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: All Editions

Connect for Office not available in **Database.com**

Connect Offline available in: Salesforce Classic

Connect Offline available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: All Editions

Connect for Office not available in **Database.com**

Connect Offline available in: Salesforce Classic

Connect Offline available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Update Your Token in Connect Offline, Connect for Office, and Data Loader

After you received your new Salesforce security token, you can update your token in Connect Offline, Connect for Office, and Data Loader.

Your security token isn't displayed in your settings or profile.

If your admin assigned you the "Two-Factor Authentication for API Logins" permission, use the code generated by an authenticator app, such as Salesforce Authenticator, for the security token value.

A new security token is emailed to you when you reset your password. Or you can reset your token separately.

- When you log in, add the security token value to the end of your password, such as *mypasswordXXXXXXXXX*.
 - Note: If you get an invalid password error when you log in, try logging in only with your password. You can get this error if you use your security token to log in from an IP address that's within a trusted IP range set by your admin.

Grant Login Access

If you need help resolving a problem, you can grant login access to your account to a Salesforce administrator or a support representative.

By default, your company's administrators can access your account without any action from you. If your organization requires users to grant login access to administrators, you can grant access for a specified duration.

Watch a Demo: O Letting Your Salesforce Administrator Access Your Account

For security reasons, the maximum period for granting access is 1 year. Once you granted access, administrators or support representatives can use your login and access your data to help you resolve problems.

- 1. From your personal settings, enter *Login Access* in the Quick Find box, then select the option to grant login access.
- 2. Set the access expiration date by choosing a value from the picklist.

3. Click Save

If an administrator, support representative, or publisher makes setup changes using your login, the setup audit trail lists the changes and the username. In some organizations, records of clicks made by an administrator logged in as you are also kept for auditing purposes.

Note: If your administrator has restricted access to certain support organizations, you can't grant access to these organizations. Packaged application licenses can also prevent access.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: All Editions

Connect for Office not available in **Database.com**

Connect Offline available in: Salesforce Classic

Connect Offline available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: All Editions

Granting administrator access available in: Enterprise, Performance, Unlimited, Developer, and Database.com Editions

USER PERMISSIONS

To view setup audit trail history:

View Setup and Configuration

Personalize Your Salesforce Experience

Update your personal information, for example your email address. Change your password and security question. If you have administrator permissions, you can also customize your Salesforce org.

My Settings: Update Your Personal Settings

Your personal settings help you customize your Salesforce experience. View or update your personal settings like your password and security question, email settings, and organize your tabs and pages.

Update Your Profile Page

Click your name or your profile picture to update your contact information at any time on your profile page. Your contact information is visible to everybody in your company.

Customize Your Navigation

Customize your Salesforce navigation so you can work more efficiently.

Update Your Chatter and Communities Settings

Get ready for Chatter and Communities. Follow people and records, and join a couple of groups that interest you.

Organize Your Day

Stay on top of your meetings, tasks, and sales goals.

Organize Your Data

Salesforce stores much of your data, like account information, in individual *records*, and organizes the data within objects. You can view and update your records and run reports on your data.

My Settings: Update Your Personal Settings

Your personal settings help you customize your Salesforce experience. View or update your personal settings like your password and security question, email settings, and organize your tabs and pages.

To get started on any task, click a menu from the left pane, then select the menu item you want. The personal settings page also includes quick links for easy access to the most commonly used personal settings tools and tasks.

Access Your Personal Settings in Salesforce Classic

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

Access Your Personal Settings in Lightning Experience

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

Update Personal Information

Update your name, phone number, email, address, and work information on the Personal Information page in My Settings.

Edit Your Email Settings

Edit outgoing email settings to specify the name that appears as well as an optional signature. You can also specify a return address, and opt to automatically send BCC emails to yourself at the return address.

Edit Your Language and Locale Settings

EDITIONS

Available in: Salesforce Classic

Available in: All Editions.

EDITIONS

Available in: Salesforce Classic

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

Add, Remove, and Organize Your Tabs

Salesforce Classic uses tabs as starting points for viewing, adding, and editing information for an object. Different apps can have different sets of tabs. Add tabs for items you use frequently in any app.

Customize Your Pages

Specify the related lists that appear in detail pages.

Set Record Type Preferences

Set an option to automatically insert your default record type when you create records. If you use this setting, you're no longer prompted to select a particular record type.

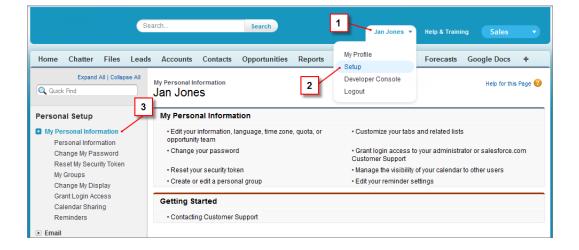
Access Your Personal Settings in Salesforce Classic

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

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

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

- 2. From the menu under your name, click Setup or My Settings.
- 3. Do one of the following:
 - If you clicked **Setup**, look on the left side of the page and click a menu item to display its sub-menu, then click the item you want.

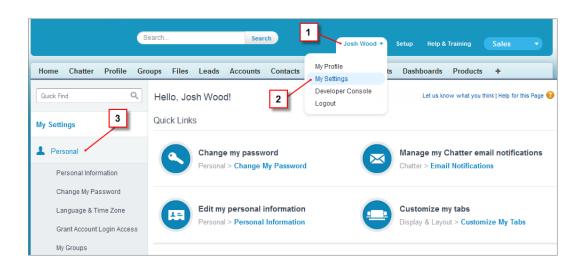


• If you clicked **My Settings**, look on the left side of the page and click a menu item under My Settings to display its sub-menu, then click the item you want.

EDITIONS

Available in: Salesforce Classic

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



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

Access Your Personal Settings in Lightning Experience

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

- 1. At the top of any Salesforce page, click your image.
- 2. Click Settings.
- **3.** On the left side of the page, click a menu item to display its submenu, then click the item you want.
 - Tip: To quickly find a page, type the first few characters of its name in the **Quick Find** box. As you type, pages that match your search terms appear in the menu. For example, to find the Personal Information page, type pers in the **Quick Find** box.

EDITIONS

Available in: Lightning Experience

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

Note: If you receive an error message regarding insufficient privileges when trying to access your personal settings, ask your Salesforce admin to enable the Improved Setup User Interface option. If you're an admin, from Setup, enter User Interface in the Quick Find box, then select User Interface. Select Improved Setup User Interface, and click Save.

Update Personal Information

Update your name, phone number, email, address, and work information on the Personal Information page in My Settings.

- 1. From your personal settings, enter *Personal* in the Quick Find box, then select **Personal** Information.
- 2. Enter *Personal Information* in the Quick Find box, then select **Personal** Information.
- 3. To make changes, click Edit

EDITIONS

Available in: Salesforce Classic and Lightning Experience

The available personal setup options vary according to which Salesforce Edition you have. If you change your email address, a confirmation message is sent to the new address. Click the link in the message for the new email address to take effect. This process ensures system security.

4. Save your changes.

Edit Your Email Settings

Edit outgoing email settings to specify the name that appears as well as an optional signature. You can also specify a return address, and opt to automatically send BCC emails to yourself at the return address.

- 1. From your personal settings, enter *My Email Settings* in the Quick Find box, then select **My Email Settings**.
- 2. Make your changes.
 - Note: In Personal and Developer Editions, a Salesforce-specific tag line is added below your personal signature on all outbound emails.

Edit Your Language and Locale Settings

- From your personal settings, enter *Time Zone* in the Quick Find box, then select Language and Time Zone. No results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**.
- **2.** Specify these settings as needed.
 - For Time Zone, select your primary time zone.
 - For Locale, select your country or geographic region.
 - For Language, select your primary language. All text and online help appears in the language you select.
 - For Email Encoding, select the character set and encoding option for email that you send from Salesforce.
- 3. Click Save.

Add, Remove, and Organize Your Tabs

Salesforce Classic uses tabs as starting points for viewing, adding, and editing information for an object. Different apps can have different sets of tabs. Add tabs for items you use frequently in any app.

- Click the Plus icon (...) to the right of your current tabs. The All Tabs page appears. By default, it shows all the tabs you have available to view or add.
- 2. If you want to see a list of just the tabs for a specific app, select that app from the View drop-down list.
- 3. Click Customize My Tabs.
- 4. In the Custom App drop-down list, select the app where you want the tab to appear. For example, if you want the Ideas tab to appear in your Marketing app, select *Marketing* and the Ideas tab appears in that app only.
- 5. To add or remove tabs and change their order, use the Add, Remove, Up, and Down arrows.

EDITIONS

Available in: Salesforce ClassicLightning Experience

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

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic

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

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

Customize Your Pages

Specify the related lists that appear in detail pages.

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

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

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

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

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

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

Set Record Type Preferences

Set an option to automatically insert your default record type when you create records. If you use this setting, you're no longer prompted to select a particular record type.

- From your personal settings, enter *Record Type* in the Quick Find box, then select Set Default Record Types or Record Type Selection—whichever one appears.
 If the Record Type Selection option isn't available, your organization isn't using record types or multiple record types aren't available.
- 2. Select the data type to specify that you want to use the default record type whenever you create that type of record. Otherwise, leave the box unchecked.

If your organization uses person accounts and you check the Account box, you automatically select the default record type for all account types. You can't set separate default record type for business accounts and person accounts. If you work with both accounts types, leave the box blank.

3. Click Save.

Update Your Profile Page

Click your name or your profile picture to update your contact information at any time on your profile page. Your contact information is visible to everybody in your company.

Available in: Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions You can update all fields on your profile, except the Manager field. Only your Salesforce admin can update the Manager field.

Customize Your Navigation

Customize your Salesforce navigation so you can work more efficiently.

Create Shortcuts to Your Top Salesforce Pages with Favorites

Favorites let you quickly access important records, lists, groups, and other frequently used pages in Salesforce.

Favorites Considerations

Keep these considerations in mind when working with favorites.

Customize Your Tabs

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

Create Shortcuts to Your Top Salesforce Pages with Favorites

Favorites let you quickly access important records, lists, groups, and other frequently used pages in Salesforce.

1. Click the star in the header of Lightning Experience to add the current page—for example, all open leads—to your favorites list.

A highlighted star means you're on a favorite. Remove a favorite by clicking the highlighted star.

2. Click the drop-down next to the star to find, open, and manage your favorites.

Each favorite shows the name, record type, and the app name (when the favorite isn't in your current app). When you open a favorite that's in a different app, you switch to that app.

SEE ALSO:

Favorites Considerations

Favorites Considerations

Keep these considerations in mind when working with favorites.

- You can have up to 200 favorites, which support these types of content.
 - Record home for standard and custom objects (including Visualforce overrides of these record views)
 - Lists
 - Dashboards
 - Reports
 - Chatter groups

Note: You can't favorite list views on the Reports, Dashboards, Files, Tasks, and Notes tabs. You also can't favorite Visualforce overrides of list views and individual Chatter posts.

• You can't favorite things in Console apps and setup pages, but you can still access your favorites from these areas.

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Lightning Experience

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

EDITIONS

Available in: Lightning Experience

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions • Only individual users can manage favorites. They can't be shared or edited by Salesforce admins.

SEE ALSO:

Create Shortcuts to Your Top Salesforce Pages with Favorites

Customize Your Tabs

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

- 1. From your personal settings, enter Customize My in the Quick Find box, then select Customize My Tabs. No results? Enter *Display* in the Quick Find box, then select Change My Display.
- 2. If you have access to multiple apps, select the app whose tabs you want to customize from the Custom Apps drop-down list.

By default, you'll see the tabs for the selected custom app that are set for your profile.



EDITIONS

Available in: Salesforce Classic

Available in: All editions except Database.com

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

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

Update Your Chatter and Communities Settings

Get ready for Chatter and Communities. Follow people and records, and join a couple of groups that interest you.

Change Your Profile or Group Photo

Upload a photo to your profile so people can see who you are, or upload a photo for groups that you own or manage.

Follow People

Follow people to see their updates in your feed, including posts, comments, and likes.

Follow Records

Follow records so you can see updates in your feed, including field changes, posts, tasks, and comments on records.

Join or Leave Groups

Join groups to collaborate with other people on projects or common areas of interest. Share project-related files and information with the group.

Update Your Email Notifications in Chatter

Set your preferences for when to be notified via email about Chatter activity. For example, you can choose to not receive a notification when you have a new follower or when someone likes your posts, but get a notification when someone mentions you on Chatter.

Change Your Profile or Group Photo

Upload a photo to your profile so people can see who you are, or upload a photo for groups that you own or manage.

EDITIONS

Available in: Salesforce Classic

Available in: All editions except Database.com

Available in: Salesforce Classic and Lightning Experience

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

- **1.** Go to your profile or the group's page.
- 2. Hover over the photo and click Add Photo or Update.
- 3. Browse for the photo you want to upload and open the file. You can upload photos in .jpg, .gif, or .png format up to 8 MB.
- 4. Create a thumbnail image by dragging the dotted lines across the photo.

If the photo is for your profile and you're a member of any communities, you can select Show in communities with publicly accessible pages. This option makes the photo visible to guest users viewing publicly accessible sites or pages that don't require login.

5. Save your changes.

Follow People

Follow people to see their updates in your feed, including posts, comments, and likes.

Available in: Salesforce Classic and Lightning Experience

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

To follow a person, click **Follow** on a person's profile page.

Once you follow people, you see their posts, comments, and likes in your feed. You can follow a maximum combined total of 500 people, topics, and records. To see how many items you're following, view the Following list on your profile.

To stop following a person, click x. When you stop following a person, you don't see future updates from that person in your feed.

Follow Records

Follow records so you can see updates in your feed, including field changes, posts, tasks, and comments on records.

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view a record:

"Read" on the record

The field changes you see in your feed depend on which of the fields your administrator configured for feed tracking. Updates to encrypted custom fields don't display in feeds.

To follow a record, click **Follow** on the record page.

When you follow a record, you see updates to the record in your feed. You can follow a maximum combined total of 500 people, topics, and records. To see how many items you're following, view the Following list on your profile.

If you want to automatically follow the records you create, enable this feature from your personal settings. Enter *My Feeds* in the *Quick* Find box, select **My Feeds**, and then select **Automatically follow records I create**. However, you don't auto-follow events, tasks, or dashboards after you create them.

To stop following a record, click 🗴 on the record page. After you stop following a record, you don't see future updates to the record in your feed.

Join or Leave Groups

Join groups to collaborate with other people on projects or common areas of interest. Share project-related files and information with the group.

- **1.** Go to group's detail page.
- 2. To join a public group, click Join or Join Group. To join a private group, click Ask to Join. Your request is sent to the private group's owner and managers, who accept or decline your request.

You can join up to 300 groups. All groups count toward this limit, except archived groups. For example, if you're a member of 300 groups, of which 10 are archived, you can join 10 more groups.

To leave a group you joined or withdraw your request to join a private group, go to the group detail page and click **x** or **Leave Group**. If you don't see these options, ask your Salesforce admin to adjust the page layout.

Update Your Email Notifications in Chatter

Set your preferences for when to be notified via email about Chatter activity. For example, you can choose to not receive a notification when you have a new follower or when someone likes your posts, but get a notification when someone mentions you on Chatter.

Available in: Salesforce Classic and Lightning Experience

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

- 1. From the menu under your name, click Setup or My Settings.
- 2. Click Chatter.
- 3. Click Email Notifications.
- 4. Select your preferences.
- 5. Save your changes.

Organize Your Day

Stay on top of your meetings, tasks, and sales goals.

Schedule and Track Your Tasks and Events

View, create, and edit tasks and events directly on your Home page in Salesforce Classic. If you have Salesforce for Outlook installed, you can sync your Outlook items with Salesforce, so they appear in the My Tasks and Calendar sections.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic

Available in: All Editions.

Track Your Sales Performance

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

View Important Updates with the Assistant

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

Schedule and Track Your Tasks and Events

View, create, and edit tasks and events directly on your Home page in Salesforce Classic. If you have Salesforce for Outlook installed, you can sync your Outlook items with Salesforce, so they appear in the My Tasks and Calendar sections.

In the My Tasks section, you can

- Create tasks
- View and filter the list of tasks assigned to you. The list displays up to 15 tasks. To view all your tasks, click **View More**.

() identifies tasks that are part of a recurring series.

• Assign unresolved emails to related records; to view all your unassigned emails, click My Unresolved Items.

In the Calendar section, you can:

- Create events and meeting requests
- View a list of scheduled events for the next seven days.

The tab displays up to 50 events per day. () identifies events that are part of a recurring series, 鶅 identifies events with invitees.

The Requested Meetings subtab lists meetings you have requested but not confirmed. The tab displays a maximum of 100 requested meetings.

Track Your Sales Performance

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

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

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

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Lightning Experience

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



Hover over the chart to see the closed and committed opportunity amounts for different dates. If you hover over a date when an opportunity was closed or set to a probability over 70%, a blue dot appears. Click the dot to see a window with more opportunity details.

View Important Updates with the Assistant

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

Click different leads or opportunities to go to the record's detail page.

Assistant	
* New lead assigned to you today	×
Kim Southbon CFO · Universal Telco	
Email	
Opportunity has overdue tasks 300 Widgets Universal Paper - 9/19/2016 - Dan Perkins	×
Opportunity has had no activity for 30 days 600 Pallets AWC · 9/26/2016 ·) Dan Perkins	×
New Task New Event	

EDITIONS

Available in: Lightning Experience

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

The following updates appear in the Assistant:

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

Updates about leads appear before updates about opportunities. Opportunity updates are arranged in order of close date.

Note:

- The Assistant doesn't show tasks due today or overdue tasks that aren't tied to an opportunity. The Today's Tasks component is an alternative that's available on the Home page, and it shows a list of your tasks due today.
- If you don't have access to activities on opportunities or if the opportunity pipeline is off, you instead see recommendations for opportunities that have close dates over the next 90 days.

Organize Your Data

Salesforce stores much of your data, like account information, in individual *records*, and organizes the data within objects. You can view and update your records and run reports on your data.

What's the Difference Between Standard and Custom Objects?

Salesforce comes with a variety of standard objects. For example, the Case object lets you store information about customer inquiries. Administrators can also create custom objects for records that store information that is unique to an organization.

Find and View Your Data

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

Update Your Data

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

Analyze Your Data

Analyze and visualize your data with reports and dashboards. Salesforce offers a powerful suite of reporting tools that work together to help you understand and act on your data.

Note and Attachment Fields

There are a number of useful fields available for notes and attachments in Salesforce. There are different fields available for notes taken with Notes, our enhanced note-taking tool, and notes taken with the old note-taking tool.

What's the Difference Between Standard and Custom Objects?

Salesforce comes with a variety of standard objects. For example, the Case object lets you store information about customer inquiries. Administrators can also create custom objects for records that store information that is unique to an organization.

Standard objects, such as accounts, contacts, or opportunities are included with Salesforce by default. *Custom objects* are based on standard objects and extend their functionality.

The Salesforce administrator defines custom objects and their properties, such as custom fields, relationships to other types of data, page layouts, and a custom tab. If the administrator created a tab for a custom object, click the custom object's tab to view the records.

Important: If you landed on this page because you were looking for more information about a particular object, your Salesforce administrator didn't create a help page for that object. The Salesforce Help covers only the standard objects provided with the initial Salesforce integration.

SEE ALSO:

Find and View Your Data Create and Update Records

Find and View Your Data

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

Find Your Records

To view all standard and custom objects that are available to you in your org, click the plus icon (+). To see the records for a particular object, click the record's tab.

Sort List Views

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

Print List Views

If your adminstrator enabled list view printing for your organization, you can print standard and custom list views.

Edit List View Filters in Salesforce Classic

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

Visualize List View Data with Charts in Lightning Experience

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

Customize Your Data View

Create customized list views to display records that meet your own criteria. You determine which records display by setting filters. All records that meet your filter criteria appear in your list view.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view a custom object tab:

• "Read" on the custom object

To view custom object records:

 "Read" on the custom object

EDITIONS

Available in: Salesforce Classic

Available in: All Editions

Get Started with Salesforce

Work with Related Lists on Records

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

Open Items You've Recently Viewed

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

Display a Visual Summary with Kanban

The Kanban view displays a visual summary for a selection of records. By seeing all your records at once, you can more effectively monitor your work and keep deals moving forward.

Change Your Working Division

If your org uses divisions, you can change your working division from the Divisions field in the sidebar.

Change the Dashboard on Your Home Tab

If your Home tab contains a dashboard snapshot, you can change the dashboard.

Find Your Records

To view all standard and custom objects that are available to you in your org, click the plus icon (+). To see the records for a particular object, click the record's tab.

The tabs you see depend on your permissions and how your administrator configured Salesforce. Let's say your company wanted to track product inventory. The Salesforce administrator could create custom objects called Inventory and Merchandise and add them as tabs.

EDITIONS

Available in: Salesforce Classic

Create New		
Recent Items	View: Open Invoices 🗘 Gol	Edit Create New View
Tablet Laptop	Recent Invoices	New
INV-0002	Invoice Number	
V <u>IIII 0002</u>	INV-0001	
	INV-0002	

You can change the order on page 76 of your tabs.

Find Record Data from a Tab

From a standard or custom record tab, select a view and click Go!.



Available in: All Editions

That action takes you to the *list view*, filtered by the view you selected.

Action	Name 🛧	Account Name	Title	Position	Phone	Email	Contact Owner
Edit Del	Adams, Arnold	ABC Labs	IT Manager	IT	1-408-555-2122	arnold.adams@tra	mwils
Edit Del	Allen, Jack	Arbuckle Laborator		Marketing	1-847-555-0557	jack.allen@training	psmit
Edit Del	Amos, Jon	Vandelay Industries	Sales Manager	Account Manager	1-713-555-2405	jon.amos@training	mwils
Edit Del	Anderson, Abby	Arbuckle Laborator		IT	1-847-555-0590	abby.anderson@tr	psmit :
Edit I Del	Antonio. Cedric	Arbuckle Laborator		IT	1-847-555-0543	certric antonio@tra-	nsmit
Edit I Del	Buchner, Francis	ABC Labs	Account Manager	Account Manager	1-408-555-2124	francis.buchner@tr	mwils .

For example, if you select New This Week on the Contacts tab, the list view shows you the new contacts that were added this week.

Use Related Lists to Find Record Data

On many records, below the main page sections, look for related lists. They identify records that are associated with the record you're currently viewing. For example, an account record probably has a related list of contacts at that account.

Note: Which records you can view and update depends on your user profile, user permissions, and sharing settings. Work with your administrator to make sure that you have access to the records and data you need.

Sort List Views

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

1. Open the list view.

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To sort a list view:

• "Read" on the records in the list

Print List Views

If your adminstrator enabled list view printing for your organization, you can print standard and custom list views.

You can print list views for these objects:

- Accounts
- Activities
- Campaigns
- Cases
- Contacts
- Contracts
- Custom objects
- Documents
- Leads
- Opportunities
- Permission sets
- Price books
- Profiles
- Products
- Reports
- Solutions
- **1.** Navigate to the list view.
- **2.** Click the print icon at the top of the page. A printable page view displays.
- 3. To print the page, click **Print This Page**.

Edit List View Filters in Salesforce Classic

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

Note: These steps work in Salesforce Classic. If you see the App Launcher icon (...) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

1. Click Edit next to the list view name.

If you see Clone instead of Edit, you don't have permission to edit this list view. Use **Clone** to clone the list view, save it under a different name and then edit the cloned list view.

- 2. In Specify Filter Criteria, change your Filter By Owner selection, if desired. Add or change the Field, Operator, or Value selections in Filter By Additional Fields.
- 3. Click Save to apply your edited filters to the list view.

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



Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To print a list view:

• "Read" on the records in the list

EDITIONS

Available in all editions

USER PERMISSIONS

To edit list views:

 "Read" on the type of record included in the list AND "Create and Customize List Views"

To edit create, edit, or delete public list views:

 "Read" on the type of record included in the list AND "Create and Customize List Views"

Visualize List View Data with Charts in Lightning Experience

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



Note: These steps work in Lightning Experience. If you see the App Launcher icon (**...**) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

- 1. On an object home page, select a list view with data you want to visualize.
- 2. Click C. The Charts panel appears.
- 3. To select a different chart, click 👻 next to the chart name.
- **4.** To change the graphical display of data, click in the Charts panel and choose a new chart type.

Your data changes to the new display.

Customize Your Data View

Create customized list views to display records that meet your own criteria. You determine which records display by setting filters. All records that meet your filter criteria appear in your list view.

Create a Custom List View in Salesforce Classic

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

Create a List View in Lightning Experience

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

Create a List View Chart in Lightning Experience

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

Edit List View Filters in Salesforce Classic

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

Edit List View Filters in Lightning Experience

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

Delete a List View in Salesforce Classic

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

Delete a List View in Lightning Experience

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



Available in: Lightning Experience

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

USER PERMISSIONS

To see list view charts:

• "Read" on the type of record included in the list

Create a Custom List View in Salesforce Classic

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

Note: These steps work in Salesforce Classic. If you see the App Launcher icon (**…**) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

1. Click **Create New View** at the top of any list page or in the Views section of any tab home page.

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

- 2. Enter the view name to display in the views drop-down list.
- 3. Enter a unique view name. The API and managed packages use this unique name.
- Specify your filter criteria. If you want more filter fields, click Add Filter Logic... and then Add Row. You can have up to 10 fields in your filter criteria.
- 5. Select the fields you want to display on the list view.

The default fields are automatically selected. From the fields that are in your page layout, you can display up to 15 different fields in your view.

When you select a long text area field, the list view displays up to 255 characters.

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

Example:

As a Salesforce admin or a user with the "Manage Public List View" permission, you have the option to hide the list view, so only you can see this list view. Open the list view. Select Visible to certain groups of users. Choose the type of group or role from the drop-down list, select the group or role from the list, then click **Add**.

Enterprise, Unlimited, Performance, and Developer Edition users can give access to a public group or role, including all users below that role. To share the list view:

Note: List views are visible to your Salesforce Customer Portal users if the Visible to all users setting is enabled for views of objects in Customer Portal users' profiles. To make list views visible only to your Salesforce users, select Visible to certain groups of users. Then share the view with the All Internal Users group or a selected set of internal groups and roles.

When implementing a Customer Portal, create custom views that contain only relevant information for Customer Portal users. Then make those views visible to Customer Portal users by sharing them with the All Customer Portal Users group, or a set of portal groups and roles.

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To create custom list views:

 "Read" on the type of record included in the list AND "Create and Customize List Views"

To create, edit, or delete public list views:

 "Manage Public List Views"

Create a List View in Lightning Experience

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

Note: These steps work in Lightning Experience. If you see the App Launcher icon (**…**) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

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

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- 1. From List View Controls, select **New**.
- 2. Enter a name for your list.
- **3.** Choose who can see this list view: just you, or all users, including Partner and Customer Portal users.
- 4. Click Save. The Filters panel appears.
- 5. Click Show me, then select All objects or My objects.
- 6. Click Done.
- **7.** Add and set filters to view only the records that meet your criteria. You have different options depending on the field you want to filter and the operator you choose.

Filters support values only between the minimum and maximum for a signed 23-bit integer, or between 1 and 2,147,483,648. A value outside of this range disables that filter.

- a. Click Add Filter.
- **b.** From the New Filter drop-down menu, select the field to filter.
- c. From the Filter by... drop-down menu, select an operator. For example, choose equals, starts with, or does not contain.
- d. For Value, make a selection or enter a value.
- e. Click Done.
- f. To set another filter, click Add Filter.
- g. To remove a filter, click 🙀 near the filter name.
- 8. To add logic that further refines which records appear in your list view, click **Filter Logic**. Use the number assigned to each filter to reference filters in your logic statement.

Important: Include every filter number in your logic statement. You can't have filters that aren't referenced in the logic statement.

Operand	Definition
AND	Finds records that match both values.
	1 AND 2
OR	Finds records that match either value.
	1 OR 2

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To create list views:

 "Read" on the type of record included in the list AND "Create and Customize List Views"

To create, edit, or delete public list views:

 "Manage Public List Views"

Operand	Definition
NOT	Finds records that exclude values.
	For example, Filter 1 is Industry equals Biotechnology . You set filter logic as NOT 1 . Your report returns records that don't have Biotechnology as the Industry value.

Let's say a rep wants to see all opportunities created in July 2015 or later, that are either in late stages of negotiation or have high probability to close, or both. Here are the filters:

- a. Last Modified Date greater or equal 7/1/2015
- b. Stage contains Proposal/Price Quote, Negotiation/Review
- c. Probability greater or equal 50

Then the rep adds the logic statement: 1 AND (2 OR 3).

- Note: NOT doesn't work with parenthetical expressions. For example, the expression 1 AND NOT (2 AND 3) evaluates as 1 AND (NOT 2 AND 3). In the filter results, no records are returned when you'd expect to see some records.
- 9. Click Save. The view appears in the list view drop-down list so you can access it later.

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

- a. From the List View Controls menu, Select Fields to Display.
- **b.** To add columns, select one or more fields from Available Fields and use the arrow to move them to Visible Fields.
- c. To remove columns, select one or more fields from Visible Fields and use the arrow to move them to Available Fields.
- d. Order columns by selecting one or more fields from Visible Fields and using the arrows to move them up or down.
- e. Click Save.
- Note: In list views you see only the data that you have access to. You see records that you own or have read or write access to, and records shared with you. List views also include records owned by or shared with users in roles below you in the role hierarchy. You can see only the fields that are visible according to your page layout and field-level security settings.

Create a List View Chart in Lightning Experience

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

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Note: These steps work in Lightning Experience. If you see the App Launcher icon (....) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

- 1. On an object home page, select a list view with data you want to visualize.
- 2. Click 🕑 .
- 3. In the Charts panel that appears, click 🤹 .
- 4. Select New Chart. A dialog box appears.
- 5. Enter a chart name.
- 6. Select a chart type: vertical bar, horizontal bar, or donut.
- 7. Select the aggregate type, aggregate field, and grouping field.

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

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

Edit List View Filters in Salesforce Classic

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

- Note: These steps work in Salesforce Classic. If you see the App Launcher icon (:::) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.
- 1. Click Edit next to the list view name.

If you see Clone instead of Edit, you don't have permission to edit this list view. Use **Clone** to clone the list view, save it under a different name and then edit the cloned list view.

- 2. In Specify Filter Criteria, change your Filter By Owner selection, if desired. Add or change the Field, Operator, or Value selections in Filter By Additional Fields.
- 3. Click Save to apply your edited filters to the list view.

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



Available in: Lightning Experience

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

USER PERMISSIONS

To create list view charts:

 "Read" on the type of record included in the list AND "Create and Customize List Views"

EDITIONS

Available in all editions

USER PERMISSIONS

To edit list views:

 "Read" on the type of record included in the list AND "Create and Customize List Views"

To edit create, edit, or delete public list views:

 "Read" on the type of record included in the list AND "Create and Customize List Views" 1 v

Edit List View Filters in Lightning Experience

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

Important: These steps work in Lightning Experience. If you see the App Launcher icon (;;;) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

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

Note: Some list views have predefined filter scopes and can't be filtered. For example, the SOQL query for a generic Team list view or the Recently Viewed list view doesn't allow further filtering of the query results.

1. From List View Controls, select **Edit List Filters**. Alternatively, click **Y**.

The Filters panel appears. Edit, remove, or add filters to view only the records that meet your criteria. You have different options depending on the field you want to filter and the operator you choose.

- 2. Click the filter you want to change.
- 3. From the Filter by... drop-down menu, select an operator. For example, choose equals, starts with, or excludes.
- 4. In Value, make a selection or enter a value, then click Done.

Filters support values only between the minimum and maximum for a signed 23-bit integer, or between 1 and 2,147,483,648. A value outside of this range disables that filter.

5. Adjust your filter logic if needed. The filter logic statement can't reference a filter number that doesn't exist.

Note: NOT doesn't work with parenthetical expressions. For example, the expression 1 AND NOT (2 AND 3) evaluates as 1 AND (NOT 2 AND 3). In the filter results, no records are returned when you'd expect to see some records.

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

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

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

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To edit list views:

 "Read" on the type of record included in the list AND "Create and Customize List Views"

To create, edit, or delete public list views:

 "Read" on the type of record included in the list AND "Create and Customize List Views"

Delete a List View in Salesforce Classic

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

- Note: These steps work in Salesforce Classic. If you see the App Launcher icon (...) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.
- 1. Select a custom list view.
- 2. Click Edit.
- 3. Click Delete.

Delete a List View in Lightning Experience

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

- Note: These steps work in Lightning Experience. If you see the App Launcher icon (...) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.
- 1. Select a list view.
- 2. Click 🔹 🗸 to access List View Controls.
- 3. Select Delete.

Work with Related Lists on Records

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

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

EDITIONS

Available in: Salesforce Classic

Available in: All Editions

USER PERMISSIONS

To delete public list views

 "Manage Public List Views"

EDITIONS

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

USER PERMISSIONS

To delete public list views

 "Manage Public List Views"

EDITIONS

Available in: Salesforce Classic

Available in: All editions

Files Leads Accounts Contacts C	pportunities Reports Dashboards Products +	Customize Page Printable View Help for this Page
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Back to List: Leads	1 Open Activities (0) Activity History (2) HTML Email Status (0)	Campaion History (0)
Lead Detail	Edit Delete Convert Clone Find Duplicates	
Lead Owner 👖 Norah Logan [Ch	Inge] Lead Status	Open
Name Denise Arlen	Phone	+1.415.901.7000
Company GrowthCo, Inc.	Email	darlen@growthco.com
Title Buyer	Rating	
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Open Ac	tivities	New Task	New Event New Meeting R	equest	Open Activities Help
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It's easy to arrange and access related lists. Here's how.

- Scroll the page to find the related list you need (1).
- If related list hover links (2) are enabled in your organization, click a link to view the list in a pop-up.
- Click **Customize Page** (3) to select and arrange the available related lists you want to see.

The related lists you can view and use depend on:

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

Open Items You've Recently Viewed

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

- To open any item's detail or edit page, just click its link.
- To view key information about an item before you click the link, hover your mouse over the link. If you don't see any information, your administrator didn't enable this feature for your organization.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: All Editions

Display a Visual Summary with Kanban

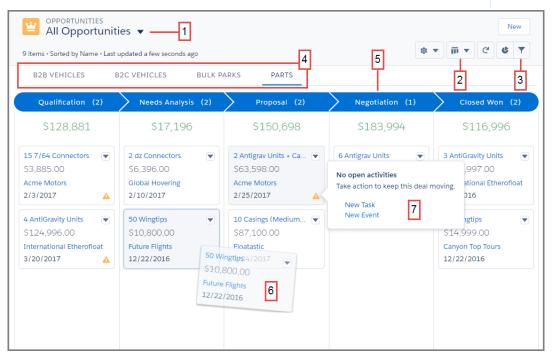
The Kanban view displays a visual summary for a selection of records. By seeing all your records at once, you can more effectively monitor your work and keep deals moving forward.

Switch to the Kanban view for almost any object from the object's list view. The Kanban view isn't available on a few objects, such as knowledge and tasks.



Available in: Lightning Experience

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



The records in the Kanban view are based on the selected list view (1). You can't view the Kanban for Recently Viewed list views. Easily toggle between the list view grid view and the Kanban view (2). Filter your records to select a single record type or view a particular subset of your records (3). Records are separated based on record type (4). Records are grouped into columns (5). Quickly move a record to a different stage by dragging the card (6). For opportunities, alerts tell how to keep a deal on track, for example, create a task or event (7).

Kanban Considerations

Be aware of these limitations and considerations when using the Kanban view.

Organize Your Data

Kanban Considerations

Be aware of these limitations and considerations when using the Kanban view.

- The Kanban view is not available from the Recently Viewed list view. Users must select another list view before they can switch to the Kanban view.
- The Kanban view displays a maximum of 200 cards.
- Columns aren't created from inactive picklist fields.
- Records in a state or status that is inactive aren't included in the Kanban view.
- Summaries can only be created for currency fields.
- Records are only displayed if the field selected for **Group By** is included on the page layout.
- If a record has a null value for the Group By field, it won't appear in the Kanban view.
- Subtabs are created for record types if the **Group By** field is included on the record type's page layout, and the record type has records associated with it.
- Drag-and-drop functionality isn't supported for touchscreens.

Opportunities

- Users receive alerts on opportunities with overdue tasks, no open activities, or no activity in the last 30 days. The alerts aren't customizable.
- Opportunities can't be grouped by the Forecast Category field.

Leads

- Leads can't be converted in the Kanban view.
- Columns aren't created for any Lead Status value with a state of Converted.

Contracts

- Contracts can't be activated in the Kanban view.
- A column isn't created for the standard Contract Status of Activated.
- Contracts can't be grouped by the Owner Expiration Notice field.

Change Your Working Division

If your org uses divisions, you can change your working division from the Divisions field in the sidebar.

Divisions segment your organization's data into logical sections, making searches, reports, and list views more meaningful.

- Select the division you want to work in from the Divisions field on the sidebar.
- Example: Let's say your org has set up divisions for sales areas. You can change your working division to a particular sales area and create a report to show the opportunities for just that division. Divisions are useful for organizations with large amounts of data.

EDITIONS

Available in: Lightning Experience

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

EDITIONS

Available in: Salesforce Classic

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

Change the Dashboard on Your Home Tab

If your Home tab contains a dashboard snapshot, you can change the dashboard.

- 1. Click Customize Page in the Dashboard section of the Home tab.
- 2. Search for a dashboard and select a different dashboard from the drop-down list.
- 3. Click **Refresh** to refresh the data in your dashboard.

EDITIONS

Available in: Salesforce Classic

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

Update Your Data

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

Create and Update Records

Creating and updating records are standard procedures for most people who use Salesforce. There are various ways to create and update records in Salesforce.

Attach Files to Records

You can attach files, such as Microsoft[®] Office documents, Adobe[®] PDFs, and images and videos, to most kinds of Salesforce records.

Print Records from Salesforce Classic

You can print Salesforce records from most detail pages.

Clone Records

When you clone a record, the new record has the record type of the original record.

Organize Records with Tags and Topics

Topics are words or phrases that you can associate with Salesforce records to organize them around common themes. Use topics to group records by a common theme, and then use those topics to filter list views. Tags are words or short phrases that you can associate with most Salesforce records to describe and organize their data in a personalized way.

Create and Update Records

Creating and updating records are standard procedures for most people who use Salesforce. There are various ways to create and update records in Salesforce.

Create Records from Object Tabs

Quickly create a record from a tab. For example, create an account from the Account tab.

Create Records in Feeds

If your administrator set up this action, you can create records in the feed on the home page, the Chatter tab, and record detail pages. Publishers on different feeds offer different actions.

Create Records with Quick Create

With Quick Create, you can create records from the home pages for leads, accounts, contacts, and opportunities.

Create a Record in Salesforce Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

Create Records from the Sidebar

Use the Create New drop-down list in the Sidebar to create a record.

Why Is the Record I'm Trying to Save Flagged as a Duplicate? What Can I Do?

Your organization uses duplicate rules, which prevent users from creating duplicate records. Read the message to decide how to proceed.

Update Records

Many Salesforce objects offer the convenience of inline editing for records.

Update Records Inline from a List View in Lightning Experience

Conveniently edit fields on records directly from a list view.

How Do I Update Custom Object Records?

Updating custom object records is similar to updating standard object records. Whether you can access and change a custom object record, depends on your permissions.

Delete Records

For some kinds of objects, deleting one record affects other, related records.

Formats for Currency, Dates, Times, Names, and Phone Numbers

The format used for currency, dates, times, phone numbers, and names of people in Salesforce is determined by your Locale setting.

Create Records from Object Tabs

Quickly create a record from a tab. For example, create an account from the Account tab.

1. Click the tab for the kind of record you want to create. For example, click the Accounts tab if you want to create an account record.

2. Click New.

- 3. Select a record type if you're prompted.
- 4. Enter values in the fields. Fields with a red bar (1) are required fields.
 - Tip: The help includes field definitions for most objects. Search the help for the object name + "fields". For example, if you're creating or editing an account record, look up "Account Fields" in the help.
- 5. Save your changes, when you finish entering values for your new record. If you navigate away from the page before clicking **Save**, you lose your changes.

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To create records:

• "Create" on the object for the kind of record you're creating

Create Records in Feeds

If your administrator set up this action, you can create records in the feed on the home page, the Chatter tab, and record detail pages. Publishers on different feeds offer different actions.

1. In the publisher, click the quick action that corresponds to the kind of record you want to create.

For example, to add a contact to an account, navigate to the account's detail page and select **Create Contact**.

2. Enter values in the fields. Fields with a red bar () are required fields.

The help includes field definitions for most objects. Search the help for the object name + "fields". For example, if you're creating or editing an account record, look up "Account Fields" in the help.

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

Create Records with Quick Create

With Quick Create, you can create records from the home pages for leads, accounts, contacts, and opportunities.

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

1. Click the tab for the kind of record you want to create. To create an account while you create

a contact, lead or opportunity, click the 🕙 icon next to the Account field in the Quick Create form you're using.

- Enter values in the fields. Fields with a red bar (1) are required fields. The help includes field definitions for most objects. Search the help for the object name + "fields". For example, if you're creating or editing an account record, look up "Account Fields" in the help.
- 3. Click Save.

Create a Record in Salesforce Lightning Experience

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

Note: This information is for Lightning Experience. If you see the App Launcher icon (**…**) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

You can create records in different ways in Lightning Experience.

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

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To create records:

• "Create" on the object for the kind of record you're creating

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To create records:

• "Create" on the object for the kind of record you're creating



Available in: Lightning Experience

Available in all editions

Create Records from the Sidebar

Use the Create New drop-down list in the Sidebar to create a record.

1. From the Create New drop-down list in the sidebar, select the type of record you want to create.

The new record page immediately displays in the appropriate tab or the Upload a File dialog box displays if you selected **File**.

- 2. Fill in the fields.
- 3. Click Save or Upload to My Files if you selected File.

Why Is the Record I'm Trying to Save Flagged as a Duplicate? What Can I Do?

Your organization uses duplicate rules, which prevent users from creating duplicate records. Read the message to decide how to proceed.

Here's what you see if the record you're trying to save is flagged as a possible duplicate.

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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- 1. A system-generated message tells you how many possible duplicates were found. The number includes only the records you have access to. If you don't have access to any of the records that are identified as possible duplicates, this message doesn't include a number. It includes a list of record owners so you can request access to the existing duplicates.
- 2. A custom alert written by whoever created the duplicate rule. Ideally, the alert explains why you can't save the record and what you can do.
- 3. If the duplicate rule allows you to save a record despite it being a possible duplicate, the **Save (Ignore Alert)** button is present. If the duplicate rule blocks you from saving a record that is a possible duplicate, the **Save** button is present. However, you can't save the record successfully until you make the necessary changes to the record so it's no longer flagged as a possible duplicate.
- 4. The list of possible duplicates includes only records you have access to. The fields shown in the list include only fields you have access to (up to the first 7 fields that were compared and determined to match). A maximum of 5 records are displayed in this list. If more than 5 duplicates were found, click Show All >> to see full list of records, up to 100. Records are listed in the order they were last modified. To go directly to one of the records in the list, by click its link.
- 5. The highlighted fields are the fields that were compared and determined to match.

Update Records

Many Salesforce objects offer the convenience of inline editing for records.

Not all fields on all objects can be edited inline. To find out whether a field supports inline editing, hover over it and look for a pencil icon (*P*).

- 1. Find and open the record you want to edit.
- 2. Click Edit.
- 3. Enter or edit values in the fields.
 - Tip: The help includes field definitions for most objects. Search the help for the object name + "fields". For example, if you're creating or editing an account record, look up "Account Fields" in the help.
- 4. Save your changes, when you finish entering or editing values.

Update Records Inline from a List View in Lightning Experience

Conveniently edit fields on records directly from a list view.

Not all fields on records in a list view can be edited inline. To find out whether a field supports inline editing, hover over it and look for the pencil 🥜 . Non-editable cells have a lock 🤗 .

As always, you can edit only the records that you have access to.

To edit fields in one row of a list view:

- 1. From the list, hover over the cell to edit, and then click 🥜 . Or, double-click the cell.
- 2. Make your change in the editable cell or cells. A **Save** button appears at the bottom of the list view.
- 3. Click Save.

If other people make inline edits to the same fields on a record simultaneously, only the most recent edit is saved.

Considerations for Editing Inline in a List View

You can't edit inline in a list view if:

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To edit records:

 "Edit" on the object for the kind of record you're editing

EDITIONS

Available in: Lightning Experience

Available in all editions

USER PERMISSIONS

To edit fields on records:

• "Edit" on the object for the kind of record you're editing

- The list view contains more than one record type.
- The list view uses filter logic that contains OR clauses.

You can edit inline in Recently Viewed or Team list views that are predefined to contain only one record type. You can also edit Tasks on the Tasks object home page, even though they're not in a list view.

Some fields or field types aren't editable inline.

- Built-in fields like Record ID or Created Date (never editable from the user interface)
- Standard fields of type date/time, auto number, roll-up summary, record type, master-detail, long text area, Rich Text, checkbox, or hierarchy
- Compound fields including Name, Account Name, address fields, and geolocation fields

Note: First Name and Last Name are editable.

- The opportunity fields Expected Revenue and Forecast Category
- Custom dependent picklists
- Encrypted text fields

How Do I Update Custom Object Records?

Updating custom object records is similar to updating standard object records. Whether you can access and change a custom object record, depends on your permissions.

Important: If you landed on this page because you were looking for more information about a particular object, your Salesforce administrator didn't create a help page for that object. The Salesforce Help covers only the standard objects provided with the initial Salesforce integration.

SEE ALSO: Update Records What's the Difference Between Standard and Custom Objects?

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view custom object records:

• "Read" on the custom object

To change custom object records:

 "Edit" on the custom object

Delete Records

For some kinds of objects, deleting one record affects other, related records.

Before you delete a record, check whether there are related records. For example, if you delete an account or contact, all associated assets are also deleted.

- 1. Find and open the record you want to delete.
- 2. Click Delete.

Formats for Currency, Dates, Times, Names, and Phone Numbers

The format used for currency, dates, times, phone numbers, and names of people in Salesforce is determined by your Locale setting.

To find out what date/time format your Locale setting uses:

- 1. From your personal settings, enter *Advanced User Details* in the Quick Find box, then select **Advanced User Details**. No results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**.
- 2. View the date/time format used in the read-only Created By field. This is the format you should use for entering dates and times in Salesforce fields.

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To delete records:

 "Delete" on the object for the kind of record you're deleting

EDITIONS

Available in: Lightning Experience andSalesforce Classic

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

Currency

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

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

Dates and Times

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

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

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



• Years appear and are saved as four digits, but you can enter the final two digits and Salesforce determines the first two. Entries 60 through 99 are assumed to be in the 20th century (for example: 1964), and entries 00 to 59 are assumed to be in the 21st century (for example: 2012).

- If your locale is set to English (United States) and you enter numbers for month and day only (example: 01/15), Salesforce supplies the current year.
- If your locale and language are English, you can enter words like Yesterday, Today, and Tomorrow, or any day of the week, and Salesforce figures it out. Weekday names (such as Monday) are always considered to be in the following week.

Phone Numbers

When you enter phone numbers in various phone fields, Salesforce preserves whatever phone number format you enter. However, if your Locale is set to English (United States) or English (Canada), 10-digit phone numbers and 11-digit numbers that start with "1" are formatted as (800) 555–1212 when you save the record.



- If you do not want the parentheses-space-hyphen formatting ((800) 555–1212) for a 10- or 11-digit number, enter a "+" before the number. For example: +49 8178 94 07–0.
- If your 10- and 11-digit phone numbers have Salesforce's automatic format, you might need to enter the parentheses when specifying filter conditions. For example: *Phone starts with (415)*.

Attach Files to Records

You can attach files, such as Microsoft[®] Office documents, Adobe[®] PDFs, and images and videos, to most kinds of Salesforce records.

The size limit for an attached file is 25 MB when attached directly to the related list, including a file attached to a solution. The size limit for an email message, including attachments, is 25 MB.

- 1. Open the record.
- 2. Click Attach File.
- 3. Click Browse and find the file you want to attach.
- 4. Click Attach File to upload the file.
- 5. Click **Done** when the upload is finished.

🕜 Note:

- When a file is attached to a record's Chatter feed it's added to the Notes and Attachments related list as a feed attachment. The file size limit for Chatter feed attachments is 2 GB.
- If the Don't allow HTML uploads as attachments or document records security setting is enabled for your organization, you cannot upload files with the following file extensions: .htm, .html, .htt, .htx, .mhtm, .mhtml, .shtm, .shtml, .acgi, .svg.

Print Records from Salesforce Classic

You can print Salesforce records from most detail pages.

1. Click the **Printable View** link located in the upper right corner of most detail pages.

A new browser window opens with the record displayed in a simple, print-ready format. You can collapse and expand individual sections in the printable view by clicking the triangles next to the section headings.



Note: On the Console tab, you can click the print icon (🖨) to open a record's printable view.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To attach files to records:

"Edit" on the object

2. Click **Print This Page** or use your browser's print function to send the page to a printer.

Clone Records

When you clone a record, the new record has the record type of the original record.

1. Click **Clone** on an existing object record.

If the record type of the cloned record isn't available in your profile or permission sets, the new record adopts your default record type.

2. Enter or change any information for the new record.

If you have read-only access to a field, the value of that field is not carried over to the cloned record.

3. Save your changes.

Organize Records with Tags and Topics

Topics are words or phrases that you can associate with Salesforce records to organize them around common themes. Use topics to group records by a common theme, and then use those topics to filter list views. Tags are words or short phrases that you can associate with most Salesforce records to describe and organize their data in a personalized way.

When Chatter is enabled, you can also see records on a topic in one central place—the Records tab of the topic detail page. For example, if a number of accounts are participating in a conference, you might add the topic *User Conference* to their records. You could then use that topic to

filter an accounts list view, or (with Chatter) view the accounts together on the Records tab of the User Conference topic page.

Here's an example topic detail page, with the Records tab showing accounts on the topic. (If you don't see a Records tab like this for a particular topic, the topic hasn't been added to any records.)

	Records	
Ø	A B C D	E F G H I J K L
Action	Account Name 1	Billing State/Province
Edit Del 🗸	Acme Inc.	GA
Edit Del 🕀	Arbuckle Laboratories - France	Paris
Edit Del 🗸	Ecotech - HQ	MA

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To clone custom object records:

• "Create" on the custom object

EDITIONS

Available in: Salesforce Classic

Available in all editions

Admins can enable or disable topics for accounts, assets, campaigns, cases, contacts, contracts, files, leads, opportunities, orders, solutions, custom objects, and English articles. While you can enable topics for tasks, the Records tab is not supported for tasks. Topics on files are added to files automatically when topics are added to the feed posts they're attached to.

Add Topics to Records

Add topics to quickly organize records around common themes, retrieve them in list views, and (with Chatter) view them on topic detail pages.

Remove Topics from Records

Remove a topic from a record if it no longer applies.

Tag Records

Use tags to group records from various objects by a common theme. Add tags in search criteria to make finding information fast and intuitive.

Remove Tags from Records

Add Topics to Records

Add topics to quickly organize records around common themes, retrieve them in list views, and (with Chatter) view them on topic detail pages.

Topics for objects must be enabled before you can add topics to records of that object type.

- Note: All topic names are public and appear in search results, but this doesn't affect the visibility of records that have topics.
- 1. On the top of the record detail page under the record name, click **Click to add topics**. If the record already has topics, click **Topics**.

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To add topics to a record:

• "Read" and "Edit" on the record

AND

"Assign Topics" to add existing topics

OR

"Create Topics" to add new topics

Ms. Liz D'Cruz	Customize Page Edit Layout Printable View Help for this Pag
Hide Feed Click to add topics	🔊 Add Tags
🔊 Post i File 🥜 Link 📊 Poll	🖶 Follow
Write something	Share Followers

If your administrator enabled feed-based layouts, click Add Topics in the sidebar of the feed view.

« Back to L	s. Liz D'Cruz	Customize Page Edit Layout Printable View Help for this Page 🥑
	File 🔗 Link 📲 Poll	Follow Followers
Q I S	how All Updates 👻	No followers.
×.	Great to meet you at the 2014 user conference! Comment · Like · Today at 11:34 AM	Add Topics

2. In the topic editor, start typing your text. As you type, you can pick a topic from the list of suggestions, or keep typing to create your own unique topic. To add more than one topic, type a comma after each topic.

Commas (,) and closing square brackets (]) automatically end a topic. Other punctuation, symbols, and separators are supported in topic names.

Records can have up to 100 topics.

3. When you're done adding topics, click **Done** or press **Enter**.

You can now use topics you add to records to filter your list views. And if your administrator enabled Chatter, topics added to records become links to topic detail pages, where associated records appear on the Records tab for easy access. (Note that Chatter posts on a record aren't automatically added to a record's topics; you must add the topics to the posts.)

Remove Topics from Records

Remove a topic from a record if it no longer applies.

Removing topics doesn't delete them. Before you remove a topic from a record, consider whether someone else added it; they may be using the topic to track the record.

- 1. On the top of the record detail page, click **Topics**.
- 2. Click 💥 next to the topic you want removed from the record.
- 3. Click Done or press ENTER.

Removing a topic from a record removes the record from any list views using that topic as a filter. If Chatter is enabled, the record is also removed from the Records tab of the topic detail page.

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To remove topics from a record:

"Read" and "Edit" on the record
 AND

AND

"Assign Topics"

Tag Records

Use tags to group records from various objects by a common theme. Add tags in search criteria to make finding information fast and intuitive.

- 1. On the top right corner of the record detail page, click **Add Tags** or **Edit Tags**.
- 2. In the Personal Tags or Public Tags text boxes, enter comma-separated lists of the tags that you want to associate with the record.

Tags can only contain letters, numbers, spaces, dashes, and underscores, and must contain at least one letter or number. As you enter new tags, up to 10 tags that have already been defined are displayed as auto-complete suggestions. The list of suggestions changes to show only those tags that match the prefix you have entered.

There are limits on the number of personal and public tags you can create and apply to records. If you exceed the number of tags, any new tags you add aren't saved. Go to the Tags page and delete infrequently used tags.

Example: For example, you could tag contacts and leads you met at a conference with the phrase User Conference 2011. You can then search for the User Conference 2011 tag and click that tag in search results to retrieve those records.

Remove Tags from Records

- 1. On the top right corner of the record detail page, click Edit Tags.
- 2. Next to the Personal Tags or Public Tags text boxes, click [X] next to the tag that you want to remove.
- 3. Save your changes.

If the tag that you removed is the last instance of the tag, the tag is deleted from your organization completely. If other records use the tag, the tag still appears in search results and the Tags page.

Analyze Your Data

Analyze and visualize your data with reports and dashboards. Salesforce offers a powerful suite of reporting tools that work together to help you understand and act on your data.

Here's a quick intro to running, sorting, filtering, and visualing your data.

Run a Report

Reports give you access to the data your organization has accumulated over time, enabling you to make informed decisions.

Sort Report Results

Sort a report by the data in a particular column by clicking that column's heading. Clicking a column header sorts data according to that column's ascending order: text is sorted from A to Z, numerical data is sorted from lowest to highest, and time/date data is sorted from earliest to latest.

Filter Your Report

Does your report give you more data than you need? Use filters to pare down your report until it only shows the data that you want.

Create Filters that Use Special Picklist Values

Use special picklist values for your search criteria. These special picklists have values of either True or False.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit tags on a record:

• "Read" on the record

To rename or delete public tags:

"Tag Manager"

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit tags on a record:

• "Read" on the record

Filter Operators Reference

The operator in a filter is like the verb in a sentence. Operators specify how filter criteria relate to one another. Refer to this list of filter operators while setting filters on list views, reports, dashboards, and some custom fields.

Visualize Your Data with Dashboards

Create a *dashboard* to show data from your report with a visual component, for example a pie chart.

Run a Report

Reports give you access to the data your organization has accumulated over time, enabling you to make informed decisions.

To run a report, find it on the Reports tab and click the report name. Most reports run automatically when you click the name.

- 1. Click the Reports tab.
- 2. Find the report you want to run and click the report name.

If you're already viewing a report, click **Run Report** to run it.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To run reports:

"Run Reports"

To schedule reports:

• "Schedule Reports" To create, edit, and delete reports:

 "Create and Customize Reports"

AND

"Report Builder"

Sort Report Results

Sort a report by the data in a particular column by clicking that column's heading. Clicking a column header sorts data according to that column's ascending order: text is sorted from A to Z, numerical data is sorted from lowest to highest, and time/date data is sorted from earliest to latest.

- To reverse the sort order, click the column heading a second time.
- If the floating report header is enabled for your organization, sort behavior is slightly different.
 When users sort data by clicking a floating report heading, the report refreshes and redirects users to the beginning of report results.
- In a report with multiple grouping levels, you can sort by the summary value that defines each grouping.

For example, take an Opportunities report that's grouped by type of business. Each Type grouping is in turn grouped by Stage, and each Stage grouping is grouped by Lead Source. Now you can sort the Type groupings by amount, the Stage grouping by stage, and the Lead Source grouping by record count.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To sort report results:

"Run Reports"

Grouped By: Sorted By:	Type Sum of Amount ↑ ▼	Stage → Stage ↑ ▼ →	Lead Source	>
Owner Role	e Opportunity Owne	r Account Name	Average Age	rtunity Name
Type: Exist	ing Business (20 records))	Sum of Amount	
			 Record Count 	
Stage: P	rospecting (9 records)			
Lead S	Source: Employee Referral	(1 record)		

Filter Your Report

Does your report give you more data than you need? Use filters to pare down your report until it only shows the data that you want.

Let's say you have a report of Accounts with fields like State and Annual Revenue. The report already has these filters:

- State includes California, Arizona, Nevada
- Annual Revenue greater than 1000000

These two filters return results for all accounts located in California, Arizona, and Nevady that generate an annual revenue greater than \$1,000,000. Now you also want to filter by industry, specifically, the Banking industry. Here's how you do that.

- 1. On the Reports tab, click a report to open it.
- 2. Click Customize.
- 3. Click Add and select a Field Filter from the list.

A new filter row appears below the other two filters.

4. Click react to the filter field and select a filter.

In our account filter example, you'd select **Industry**. Which filters are available in your organization depends on the fields that your administrator set up for account records.

- **5.** Select an operator for the filter and type the filter value in the next field. In our account filter example, you'd select **equals** and type *Banking*.
- 6. Click Save.

Now your report shows Banking industry Accounts in California, Arizona, and Nevada with an annual revenue above \$1,000,000.00.

Create Filters that Use Special Picklist Values

Use special picklist values for your search criteria. These special picklists have values of either True or False.

For example, to show all opportunities you have won, enter *Won equals True* as your search criteria. To show all closed/lost opportunities, enter *Closed equals True* and *Won equals False*.

Note: If you are creating filter criteria for a report or list view, the lookup icon automatically displays when you choose to filter on one of the special picklists. Click the lookup icon to choose the value True or False. Alternatively, you can manually enter True or False in the filter criteria.

These are the available fields and their values:

Special Picklist Field	Value	Description
Accounts and contacts: Is Person Account	True	The account is a person account. Your administrator could have customized the name of this field. This field displays as the person account icon (
	False	The account is a business account.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create, edit, and delete reports:

- "Create and Customize Reports"
 - AND
 - "Report Builder"

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

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

Special Picklist Field	Value	Description
Accounts, leads, and opportunities: Partner Account	True	The account is a partner account, or the lead or opportunity owner is a partner user.
	False	The account is not a partner account or the lead or opportunity owner is not a partner user.
Activities: All-day	True	Applies only to events, not tasks. The event is marked as an all day event.
	False	The event has a specific time.
Activities: Closed	True	Applies only to tasks, not events. The task has been closed, that is, the task Status field has a "Closed" value.
	False	Task is still open.
Activities: Event Invitation (Only for reports)	True	Applies only to events, not tasks. The event is the meeting invite sent to another user for a multi-person event.
	False	The event is the original multi-person event assigned to the event host.
	False	Activity does not have a green sheet.
Activities: Task	True	Activity is a task, not an event.
	False	Activity is an event.
Campaigns: Active	True	Campaign is active and can be chosen from various campaign picklists.
	False	Campaign is inactive.
Cases: Closed	True	The case is closed, that is, the case Status field has a "Closed" value.
	False	Case is still open.
Cases: Escalated	True	Case has been automatically escalated via your org's escalation rule.
	False	Case has not been escalated.
Cases: New Self-Service	True	Case has a new comment added by a Self-Service user.
Comment	False	Case does not have a new Self-Service comment.
Cases: Open (Only for reports)	True	The case is open, that is, the case Status has a value that is not equivalent to "Closed."
	False	Case has been closed.
Cases: Self-Service Commented	True	Case has a comment added by a Self-Service user.
	False	Case does not have a Self-Service comment.
Contacts: Do Not Call	True	The contact cannot be included in a call recipient list.

Special Picklist Field	Value	Description
	False	The contact can receive calls.
Contacts: Email Opt Out	True	The contact cannot be included in a mass email recipient list.
	False	The contact can receive mass email.
Contacts: Fax Opt Out	True	The contact cannot be included in a fax recipient list.
	False	The contact can receive faxes.
Contacts: Self-Service Active	True	The contact is enabled to log in to your Self-Service portal.
(Only for reports)	False	The contact is not enabled for Self-Service.
Leads: Converted	True	The lead has been converted.
(Only for reports)	False	The lead has not been converted.
Leads: Do Not Call	True	The lead cannot be included in a call recipient list.
	False	The lead can receive calls.
Leads: Email Opt Out	True	The lead cannot be included in a mass email recipient list.
	False	The lead can receive mass email.
Leads: Fax Opt Out	True	The lead cannot be included in a mass fax recipient list.
	False	The lead can receive faxes.
Leads: Unread	True	The lead has not yet been viewed or edited by the owner since it was assigned to that user.
	False	The lead has been viewed or edited at least once by the owner since it was assigned.
Opportunities: Closed	True	The opportunity is closed, that is, the Stage field has a value of the type Closed/Won or Closed/Lost.
	False	The opportunity is still open.
Opportunities: Has Products	True	Products have been added to the opportunity.
	False	Products have not been added to the opportunity.
Opportunities: Is Split	True	The opportunity has revenue or overlay splits.
	False	The opportunity does not have revenue or overlay splits.
Opportunities: Primary (Only for Partner Opportunities report)	True	The partner for the opportunity has been marked as the primary partner.
	False	The partner for the opportunity has not been marked as the primary partner.
Opportunities: Private	True	The opportunity owner has checked the Private box on the opportunity edit page.

Special Picklist Field	Value	Description
	False	The Private box on the opportunity is not checked.
Opportunities: Won	True	The opportunity is closed and won, that is, the Stage field has a value of the type Closed/Won.
	False	The opportunity has not been won. The Stage field may have a value of the type Open or Closed/Lost.
Products: Active	True	Product is active and can be added to opportunities in Enterprise, Unlimited, and Performance Edition orgs.
	False	Product is inactive and cannot be added to opportunities.
Product: Has Quantity Schedule	True	Product has a default quantity schedule.
	False	Product does not have a default quantity schedule.
Product: Has Revenue Schedule	True	Product has a default revenue schedule.
	False	Product does not have a default revenue schedule.
Solutions: Visible in Self-Service Portal	True	The solution has been marked Visible in Self-Service Portal and is visible to Self-Service portal users.
	False	Solution is not marked Visible in Self-Service Portal and is not visible to Self-Service portal users.
Solutions: Reviewed	True	The solution has been reviewed, that is, the solution Status field has a "Reviewed" value.
	False	Solution is not reviewed.
Solutions Out of Date	True	The translated solution has not been updated to match the master solution with which it is associated.
	False	The translated solution has been updated to match the master solution with which it is associated.
Users: Active	True	User is active and can log in.
	False	User is inactive and cannot log in.
Users: Offline User	True	User has access to use Connect Offline.
	False	User is not enabled for Connect Offline use.
Users: Marketing User	True	User can manage campaigns.
	False	User is not enabled to manage campaigns.
User: Is Partner	True	User is a partner user.
	False	User is not a partner user.



Note: The special picklists you can view are only those that are visible in your page layout and field-level security settings.

Filter Operators Reference

The operator in a filter is like the verb in a sentence. Operators specify how filter criteria relate to one another. Refer to this list of filter operators while setting filters on list views, reports, dashboards, and some custom fields.

Operator	Uses
equals	Use for an exact match. For example, "Created equals today."
less than	Use for results that are less than the value you enter. For example, "Quota less than 20000" returns records where the quota field ranges from 0 to 19,999.99.
greater than	Use when you want results that exceed the value you enter; for example, "Quota greater than 20000" returns records where the quota amount begins at 20,000.01.
less or equal	Use for results that match or are less than the value you enter.
greater or equal	Use for results that match or exceed the value you enter.
not equal to	Shows results that don't have the value you enter. This operator is especially useful for eliminating empty fields. For example, "Email not equal to <blank>."</blank>
contains	Use for fields that include your search string, but sometimes also include other information. For example, "Account contains California" would find California Travel, California Pro Shop, and Surf California. Keep in mind that if you enter a short search string, it can match a longer word. For example, "Account contains pro" would find California Pro Shop and Promotions Corporation. This operator is not case-sensitive.
does not contain	Eliminates records that don't contain the value you enter. For example, "Mailing Address Line 2 does not contain P. O. Box."
	Note: When specifying filter criteria on roll-up summary fields, does not contain uses "or" logic on comma-separated values. On list views, reports, and dashboards, does not contain uses "and" logic.
	This operator is not case-sensitive.
starts with	Use when you know what your value starts with, but not the exact text. This operator is a narrower search term than "contains." For example, if you enter "Account starts with California," you find California Travel and California Pro Shop, but not Surf California.
includes	Available when you choose a multi-select picklist as the selected field. Use this operator to find records that include one or more of the values you enter.
	For example, if you enter "Interests includes hockey, football, baseball," you find records that have only hockey selected, and records that have two or three of the values entered. Results do not include partial matches of values.
excludes	Available when you choose a multi-select picklist as the selected field. Use this operator to find records that do not contain any values that match the ones entered.
	For example, if you enter "Interests exclude wine, golf," your report lists records that contain any other values from that picklist, including values that are blank. Results do not include partial matches of values.

Operator	Uses
between	Available for dashboard filters only. Use to filter on ranges of values. For each range, the filter returns results that are greater than or equal to the minimum value and less than the maximum value.
	For example, if you enter "Number of Employees from 100 through 500," your results include accounts with 100 employees up to those with 499 employees. Accounts with 500 employees aren't included in the results.
within	Available when you create list views based on a Geolocation custom field. Shows results that are within the specified radius from a fixed latitude and longitude. For example, if you enter "Warehouse location within 50 miles 37.775° –122.418°,", your list view includes all warehouses within a 50–mile radius of San Francisco, California.

Visualize Your Data with Dashboards

Create a *dashboard* to show data from your report with a visual component, for example a pie chart.

Let's say your have a report that shows Banking industry Accounts in California, Arizona, and Nevada with an annual revenue above \$1,000,000.00. Now you want to visualize this report for your team with a pie chart. Here's how you do that.

- 1. Click the Reports tab.
- 2. Click New Dashboard.
- 3. Click the pie chart icon in the Components tab and drag it to one of the columns in the layout.
- 4. Add a header and a title for your pie chart.
- 5. Click the Data Sources tab and expand the Reports list.
- 6. Find your report and drag it over to the pie chart.
- 7. Save your changes.

The dashboard is now available on the Reports tab for anyone who has permissions to view the report data. If you click on the dashboard, the underlying report opens.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view and refresh dashboards:

 "Run Reports" AND access to dashboard folder

To create dashboards:

 "Run Reports" AND "Manage Dashboards"

To edit and delete dashboards you created:

 "Run Reports" AND "Manage Dashboards"

To edit and delete dashboards you didn't create:

 "Run Reports," "Manage Dashboards," AND "View All Data"

Note and Attachment Fields

There are a number of useful fields available for notes and attachments in Salesforce. There are different fields available for notes taken with Notes, our enhanced note-taking tool, and notes taken with the old note-taking tool.

Fields for Notes

Note: In Salesforce1 and Lightning Experience, there are additional fields for relating multiple records to the note.

	Field	Description
Body		Text of the note. Can hold up to 50 MB of data.
Title		Subject of note. Maximum of 200 characters.

EDITIONS

Available in: Salesforce1, Salesforce Classic, and Lightning Experience

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

Fields for the Old Note-Taking Tool

Field	Description
Body	Text of the note. Can hold up to 32 KB of data.
Private	Checkbox to indicate that note is only accessible to the owner and administrators. For administrators to view private notes, they need the "View All Data" permission; to edit them, they need the "Modify All Data" permission.
Title	Short description of note. Maximum of 80 characters.

Fields for Attachments

Attachment Fields		
Field	Description	
Description	Description of the uploaded file. Maximum of 500 characters.	
File Name	Name of the uploaded file.	
Private	Checkbox to indicate that the attachment is only accessible to the owner and administrators. For administrators to view private attachments, they need the "View All Data" permission; to edit them, they need the "Modify All Data" permission.	
Share With Connections	Checkbox to indicate that the attachment is shared with connections when the parent record is shared. This checkbox is only available if Salesforce to Salesforce is enabled, the parent record is shared, and the attachment is public.	
Size	Size of the uploaded file.	

Work on Mobile Devices

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

Salesforce Mobile Product Comparison

Salesforce1, SalesforceA, Salesforce Mobile Classic, Salesforce Authenticator, and Salesforce Wave Analytics are available on different mobile devices and in different editions, with different support options.

Salesforce1 Mobile App

The Salesforce1 mobile app is Salesforce on the go! This enterprise-class mobile experience gives you real-time access to the same information you see in the office, but organized for getting work done between customer meetings, while waiting for a flight, even when you're in line for coffee. The intuitive interface makes it easy to navigate and interact with data on a touchscreen, so you can review and update information with just a few taps. And Salesforce1 includes many of your org's customizations, so the app is tailored to your business needs.

Salesforce Mobile Classic

The Salesforce Mobile Classic app provides mobile access to your Salesforce data from Android[™] and iPhone[®] devices. You can view, create, edit, and delete records, keep track of your activities, view your dashboards, run simple reports, and log calls and emails. Your Salesforce admin must assign you a mobile license before you can use Salesforce Mobile Classic.

Salesforce Mobile Product Comparison

Salesforce1, SalesforceA, Salesforce Mobile Classic, Salesforce Authenticator, and Salesforce Wave Analytics are available on different mobile devices and in different editions, with different support options.

Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
Salesforce1	Access and update Salesforce data from an interface that's optimized for navigating and working on your touchscreen mobile device. You can view, edit, and create records, manage your activities, view your dashboards and reports, and use Chatter. Salesforce1 supports many standard objects and list views, all your organization's custom objects, the integration of other mobile apps, and many of your organization's Salesforce customizations (including Visualforce tabs and pages and Lightning Pages).	 Free for customers using: Personal Edition Group Edition Professional Edition Enterprise Edition Unlimited Edition Performance Edition Developer Edition Contact Manager Edition 	 Android phones Android tablets iPad models iPhone models Windows 8.1 and Windows 10 phones (mobile browser app only) 	Yes, for viewing data. Beta: Create and edit data (Salesforce1 for Android, v9.0 or later and Salesforce1 for iOS, v10.0 or later)
SalesforceA	Manage users and view information for Salesforce organizations from your smartphone.	Free for customers using:Group EditionProfessional Edition	Android phonesAndroid tabletsiPad models	No

Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
	Deactivate or freeze users, reset passwords, unlock users, edit user details, and assign permission sets. This app is restricted to users with the "Manage Users" permission.	 Enterprise Edition Unlimited Edition Performance Edition Developer Edition Contact Manager Edition 	iPhone modelsiPod Touch	
Salesforce Mobile Classic	You can view your dashboards, run simple reports, log calls and emails, track your activities, and create, edit, and delete records. Most standard Sales objects and some Service objects are available. Custom objects and configurations are also supported.	 App requires mobile licenses and is available for: Professional Edition Enterprise Edition Unlimited Edition Performance Edition Developer Edition 	Android phonesAndroid tabletsiPhone models	Yes
Salesforce Authenticator	Secure your account by using your mobile device for two-factor authentication. Verify your identity or block unrecognized activity with a one-tap response to a push notification. If you enable location services for the app, you can set trusted locations, such as your home or office. If automation is available, the app can verify your identity automatically when you're in a trusted location. Get a code to use as a backup identity verification method.	 Free for all customers using: Group Edition Professional Edition Enterprise Edition Performance Edition Unlimited Edition Developer Edition Contact Manager Edition 	 Android phones iPhone 5 or later models 	Yes, for generating verification codes
Salesforce Wave Analytics	Get important analytics information and make data-driven decisions from any configured mobile device. Explore dashboards, lenses, and datasets; filter, group, aggregate, and visualize data; drill in to the data of most interest; and share and take action.	 Available at additional cost for customers using: Enterprise Edition Performance Edition Unlimited Edition Developer Edition 	iPad modelsiPhone modelsAndroid models	No

SEE ALSO:

Salesforce1 Mobile App Salesforce Mobile Classic Salesforce Authenticator

Salesforce1 Mobile App

The Salesforce1 mobile app is Salesforce on the go! This enterprise-class mobile experience gives you real-time access to the same information you see in the office, but organized for getting work done between customer meetings, while waiting for a flight, even when you're in line for coffee. The intuitive interface makes it easy to navigate and interact with data on a touchscreen, so you can review and update information with just a few taps. And Salesforce1 includes many of your org's customizations, so the app is tailored to your business needs.

Note: Salesforce1 puts key data and features at your disposal, wherever you are. But there are business activities that are probably better done from your laptop or desktop. To see data or do actions that aren't available in Salesforce1, use Lightning Experience or Salesforce Classic instead.

EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

Get the Salesforce1 Mobile App

The way you access Salesforce1 depends on how you want to work: using an app installed on your device or using a mobile browser. It's possible that some of the Salesforce1 versions are disabled for your organization—ask your Salesforce administrator about your options.

Salesforce1 Mobile App Features: What's Available in Each Version

Salesforce1 is available as a downloadable app on iOS and Android devices and as a mobile browser app in supported mobile browsers. In most cases, all of the Salesforce1 "flavors" include the same features. But there are some differences between the experiences, often related to differences in the mobile platforms on which Salesforce1 is supported.

Requirements for the Salesforce1 Mobile App

Salesforce1 is available for most Salesforce editions and user license types. The app is supported on a variety of mobile platforms, with some minimum operating system and mobile browser requirements.

What Data Is Available in the Salesforce1 Mobile App?

Salesforce1 uses your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets to determine the data that's available to you. You see most of the objects, record types, fields, and page layouts that you do when working in the full Salesforce site. But not all Salesforce data is available in Salesforce1.

Why Can't I Log in to the Salesforce1 Mobile App?

You're certain that you're using your correct Salesforce credentials but you can't log in to Salesforce1? There are several common reasons why you might be having trouble.

Turn the Salesforce1 Mobile Browser App Off or On

When the Salesforce1 mobile browser app is enabled for your organization, you automatically redirect to this experience when you log in to Salesforce from a supported mobile browser. Using the full Salesforce site in a mobile browser isn't supported. But it is possible to turn off the mobile browser app if you need to access Salesforce Classic from your mobile device for awhile.

Find Help in the Salesforce1 Mobile App

Salesforce1 includes a **Help** link that you can use to learn about the mobile app.

Help Resources for the Salesforce1 Mobile App

These resources provide information about using the Salesforce1 mobile app, setting up your organization to use the app, and developing for the app.

SEE ALSO:

Help Resources for the Salesforce1 Mobile App

Get the Salesforce1 Mobile App

The way you access Salesforce1 depends on how you want to work: using an app installed on your device or using a mobile browser. It's possible that some of the Salesforce1 versions are disabled for your organization—ask your Salesforce administrator about your options.

Install a Downloadable App

The Salesforce1 downloadable apps are available for Android and iOS devices that meet minimum platform requirements. You can download and install Salesforce1 from Google Play or the App Store.

Once the app is installed, launch it from your home screen and log in to your Salesforce account. You may be prompted to create a security PIN. By default, you're connected to your production environment.

Note: If you're not able to log in, verify with your Salesforce admin that you're enabled to use the downloadable app.

Access the Mobile Browser App

The Salesforce1 mobile browser app runs in a mobile browser on Android, iOS, and Windows devices that meet minimum platform requirements. The mobile browser app is a great option if your organization prevents installing apps on your corporate-issued device.

If the mobile browser app is enabled for your organization, you're automatically redirected to Salesforce1 when you log in to Salesforce from a supported mobile browser. If Salesforce1 doesn't automatically start for you, make sure you didn't turn off the redirection to the mobile browser app and that you're using a supported browser.

(From most unsupported mobile browsers, you're redirected to Salesforce Classic instead. If you're using an iOS device, you can access the mobile browser from Google Chrome for iOS or when tapping a Salesforce link in Gmail for iOS, but working in either of these environments isn't supported by Salesforce.)

SEE ALSO:

Requirements for the Salesforce1 Mobile App Why Can't I Log in to the Salesforce1 Mobile App? Turn the Salesforce1 Mobile Browser App Off or On

Salesforce1 Mobile App Features: What's Available in Each Version

Salesforce1 is available as a downloadable app on iOS and Android devices and as a mobile browser app in supported mobile browsers. In most cases, all of the Salesforce1 "flavors" include the same features. But there are some differences between the experiences, often related to differences in the mobile platforms on which Salesforce1 is supported.

Feature	Android Downloadable Apps	iOS Downloadable App	Mobile Browser App
Navigation and Actions			
Access up to 200 list views per object	~	~	~
See visual snapshots of business data on list view charts			~
			(tablets only)
Sort and filter list views	~	~	~

EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

Get Started with Salesforce

(Phane calls supported on iPhones and Android phones only) • </th <th>Feature</th> <th>Android Downloadable Apps</th> <th>iOS Downloadable App</th> <th>Mobile Browser App</th>	Feature	Android Downloadable Apps	iOS Downloadable App	Mobile Browser App
Use quick actions created for your organization See Google Maps images in standard address fields See Google Maps images in standard address fields Search Search Search for Salesforce records Search for Salesforce records See matching search results for all records by object See matching search results for all records, not just those that have been recently viewed Sort search results Get more relevant results with dependent lookup filters Get more relevant results with dependent lookup filters Get more relevant results with dependent lookup filters Get automatic spell checking and correction on search keywords Get automatic spell checking and correction on search keywords Salesforce1 Relationship and Data Management Add new records and update existing records See company logos for accounts Convert qualified leads to contacts Add contacts to Salesforce from mobile device contact lists See lead scores Convert qualified leads to contacts Co	Do actions like make phone calls, log calls, and send emails	~	~	~
See Google Maps images in standard address fields Search Search Search for Salesforce records Scope global searches to find records by object See matching search results for all records, not just those that have been recently viewed Sort search results Get more relevant results with dependent lookup filters Get automatic spell checking and correction on search keywords Get automatic spell checking and correction on search keywords Use global search to find Chatter posts in the "All Company" feed Use Spotlight Search to find Salesforce data without opening Salesforce1 Relationship and Data Management Add new records and update existing records Prevent the creation of duplicate records Stay up to date about important companies and industries with News See company logos for accounts Locate, associate, and view Twitter profiles for Salesforce accounts, contacts, and leads Teckrelationships between accounts and contacts with Contacts Add contacts to Salesforce from mobile device contact lists See company compony time to follow sales processes and get deals Convert qualified leads to contacts	(Phone calls supported on iPhones and Android phones only)			
Search or Salesforce records Search for Salesforce records Search results for all records, not just those that have been recently viewed Sort search results Get more relevant results with dependent lookup filters Get automatic spell checking and correction on search keywords Get automatic spell checking and correction on search keywords Get automatic spell checking and correction on search keywords Get automatic spell checking and correction on search keywords Get automatic spell checking and correction on search keywords Get automatic spell checking and correction on search keywords Get automatic spell checking and correction on search keywords Get automatic spell checking and correction on search keywords Get automatic spell checking and correction on search keywords Get automatic spell checking and correction on search keywords Get automatic spell checking and correction on search keywords Get automatic spell checking and correction on search keywords Get automatic spell checking and contacts without opening Salesforce1 Get eation of duplicate records Get eation of duplicate	Use quick actions created for your organization	~	~	✓
Search for Salesforce records Search for Salesforce records Scope global searches to find records by object Search results for all records, not just those that have been recently viewed Sort search results Get more relevant results with dependent lookup filters Get automatic spell checking and correction on search keywords Get automatic spell checking and industries with Add new records and update existing records Get automatic spell checking and industries with Contacts Get automatic spell checking and contacts with Contacts Get automatic spell checking and contacts with Contacts Get automatic spell checking and contacts Get automatiche and polle devi	See Google Maps images in standard address fields	✓	~	~
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Use global search to find Chatter posts in the "All Company" feed Use Spotlight Search to find Salesforce data without opening Salesforce1 Relationship and Data Management Add new records and update existing records Add new records and update existing records Prevent the creation of duplicate records Prevent the creation of duplicate records Stay up to date about important companies and industries with News See company logos for accounts Locate, associate, and view Twitter profiles for Salesforce accounts, contacts, and leads Track relationships between accounts and contacts with Contacts Add contacts to Salesforce from mobile device contact lists See lead scores Convert qualified leads to contacts Use Path on opportunities to follow sales processes and get deals Convert qualified leads to contacts	Get more relevant results with dependent lookup filters	~	~	~
Use Spotlight Search to find Salesforce data without opening Salesforce 1 Relationship and Data Management Add new records and update existing records Add new records and update existing records Prevent the creation of duplicate records Stay up to date about important companies and industries with News See company logos for accounts Locate, associate, and view Twitter profiles for Salesforce accounts, contacts, and leads Track relationships between accounts and contacts with Contacts to Multiple Accounts Add contacts to Salesforce from mobile device contact lists See lead scores Convert qualified leads to contacts Use Path on opportunities to follow sales processes and get deals	Get automatic spell checking and correction on search keywords	~	~	~
Salesforce 1 Relationship and Data Management Add new records and update existing records Prevent the creation of duplicate records Stay up to date about important companies and industries with News See company logos for accounts Locate, associate, and view Twitter profiles for Salesforce accounts, contacts, and leads Track relationships between accounts and contacts with Contacts to Multiple Accounts Add contacts to Salesforce from mobile device contact lists See lead scores Convert qualified leads to contacts Use Path on opportunities to follow sales processes and get deals	Use global search to find Chatter posts in the "All Company" feed			~
Add new records and update existing records Add new records and update existing records Prevent the creation of duplicate records Stay up to date about important companies and industries with News See company logos for accounts Locate, associate, and view Twitter profiles for Salesforce accounts, contacts, and leads Track relationships between accounts and contacts with Contacts to Multiple Accounts Add contacts to Salesforce from mobile device contact lists Convert qualified leads to contacts Use Path on opportunities to follow sales processes and get deals Convert qualified leads to contacts	Use Spotlight Search to find Salesforce data without opening Salesforce1		*	
Prevent the creation of duplicate records Prevent the creation of duplicate records Stay up to date about important companies and industries with News See company logos for accounts Locate, associate, and view Twitter profiles for Salesforce accounts, contacts, and leads Track relationships between accounts and contacts with Contacts to Multiple Accounts Add contacts to Salesforce from mobile device contact lists See lead scores Convert qualified leads to contacts Use Path on opportunities to follow sales processes and get deals Convert qualified leads to contacts	Relationship and Data Management			
Stay up to date about important companies and industries with News See company logos for accounts Locate, associate, and view Twitter profiles for Salesforce accounts, contacts, and leads Track relationships between accounts and contacts with Contacts to Multiple Accounts Add contacts to Salesforce from mobile device contact lists See lead scores Convert qualified leads to contacts USe Path on opportunities to follow sales processes and get deals closed	Add new records and update existing records	<	~	~
News See company logos for accounts Locate, associate, and view Twitter profiles for Salesforce accounts, contacts, and leads Track relationships between accounts and contacts with Contacts to Multiple Accounts Add contacts to Salesforce from mobile device contact lists See lead scores Convert qualified leads to contacts USe Path on opportunities to follow sales processes and get deals closed	Prevent the creation of duplicate records	<	<	<
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See lead scores Convert qualified leads to contacts Use Path on opportunities to follow sales processes and get deals closed	Track relationships between accounts and contacts with Contacts to Multiple Accounts	~	*	~
Convert qualified leads to contacts Use Path on opportunities to follow sales processes and get deals closed	Add contacts to Salesforce from mobile device contact lists	v	~	
Use Path on opportunities to follow sales processes and get deals <	See lead scores	~	~	~
closed	Convert qualified leads to contacts	~	~	~
Work with account teams and opportunity teams \checkmark \checkmark \checkmark	Use Path on opportunities to follow sales processes and get deals closed	~	*	~
	Work with account teams and opportunity teams	~	~	~

Feature	Android Downloadable Apps	iOS Downloadable App	Mobile Browser App
Add products, quotes, and multiple influential campaigns to opportunities	~	*	~
Manage campaign member statuses	~	~	~
View forecast data		~	
Work with data stored outside of Salesforce	~	~	~
Productivity (Salesforce Today, Notes, Events, Tasks, Email)		
Use Today to prepare for and manage the day's events, join conference calls, and log mobile calendar events in Salesforce	~	*	
Add contacts to Salesforce from events in Today	~	*	
Take rich text meeting notes and easily relate them to records	~	~	~
Add images to notes		~	
Create tasks from Notes	*	~	~
Create tasks from Chatter posts			~
Create recurring and follow-up tasks	~	~	~
Track, close, or reopen tasks	~	~	~
Do quick task updates with a tap: edit comments or change a due date, status, or priority	~	*	~
Create and view Salesforce events	~	~	~
Send email from Salesforce using SalesforcelQ Inbox	~	~	
Work.com			
Use Work.com Coaching, Goals, Rewards, and Skills	~	~	~
(Skills available in Android only)			
Customer Service Tools			
Work with cases and case emails	~	~	~
Use Social Customer Service to track cases and respond to Twitter Tweets in real time	~	*	~
View Salesforce Knowledge articles	~	~	<
Track purchased products with Assets	~	~	~
Streamline field service with Work Orders (including milestones, linked articles, and work order hierarchies)	~	*	~

Feature	Android Downloadable Apps	iOS Downloadable App	Mobile Browser App
View scheduled services and navigate to service locations with Field Service Lightning	~	*	~
Reports and Dashboards			
View dashboards, dashboard components (including Visualforce dashboard components), and reports	~	*	~
View Lightning Experience reports, dashboards, and charts	~	~	~
Sort data in reports	v	~	✓
Apply dashboard filters	~	~	✓
Share snapshots of Enhanced Charts in the Chatter feed			~
Salesforce Files			
Use Salesforce Files	~	~	<
Use Salesforce Files if Chatter is turned off			~
Browse and share files from external data sources, such as SharePoint, OneDrive for Business, Google Drive, and Box (<i>Requires</i> <i>Files Connect</i>)	~	*	~
Edit Microsoft Office 365 files	~	~	
Access Content Libraries		~	
Chatter (Feeds, Topics, Profiles, Groups)			
Use Chatter feeds, people, and groups	~	~	~
Search in the main Chatter feed	~	~	~
Mute Chatter posts			~
View, edit, and follow feed entries organized by topic; add multiple topics to posts			~
Bundle multiple record updates into a single post			~
Attach photos or files to posts or comments, or use quick actions to post photos or files	~	*	~
Share Chatter posts	~	~	
See previews of files posted to posts and comments	~	~	~
Double-tap to add or remove bookmarks for Chatter posts		~	
Ask questions and get answers in the feed			✓
Escalate questions in Chatter to cases			~

Feature	Android Downloadable Apps	iOS Downloadable App	Mobile Browser App
Edit user profile details	✓		<
Change the user profile picture	~	<	✓
Add group photos	<	<	<
Add records to groups	<	~	<
Collaborate with more privacy in unlisted Chatter groups	<	~	<
Post announcements in group feeds	~	~	~
Manage groups, including add group members	~	~	~
Use Salesforce1 if Chatter is turned off	~	~	~
Use quick actions in Salesforce1 if Chatter is turned off	~	~	~
Launch Salesforce1 from Chatter email notifications and digest links	*	*	~
Salesforce Communities			
Access communities created using the Salesforce Tabs + Visualforce template	*	*	~
Business Logic and Process Automation			
Submit records for approval	~	~	<
View the status of pending approvals and approve or reject approval requests		*	~
Resume or delete paused flow interviews	~	~	~
Notifications			
Receive in-app notifications	~	~	~
Receive push notifications	~	~	
Configure the push notifications that are sent	~	~	
Offline			
View cached data when working offline	~	~	
Create, edit, and delete records for recently accessed objects when offline (Beta)	*	*	
Access and Security			
Log in faster using password manager apps right from the Salesforce1 login page		*	
Configure connections to multiple instances from the login page	*	~	

Feature	Android Downloadable Apps	iOS Downloadable App	Mobile Browser App
Switch between multiple Salesforce accounts or communities without leaving the app	~	~	
Open most Salesforce URLs directly in Salesforce1	~	~	
Control app access with a security passcode	~	~	
Use Connected App security settings to meet industry compliance regulations	~	*	
Get enhanced security with Mobile Device Management (MDM)	~	~	
Customizations and User/App Settings			
View Visualforce pages	<	<	*
Access Lightning pages, and custom and third-party apps	<	<	*
See a customized selection and arrangement of actions in the action bar and list item actions	~	~	*
See custom branding	~	~	~
See field-level help	~	~	~

SEE ALSO:

Help Resources for the Salesforce1 Mobile App

Requirements for the Salesforce1 Mobile App

Salesforce1 is available for most Salesforce editions and user license types. The app is supported on a variety of mobile platforms, with some minimum operating system and mobile browser requirements.

Mobile Platform Requirements

Salesforce1 is available on phones and tablets that meet these mobile platform requirements.

Operating System and Version Requirements	Mobile Browser Requirements*
Android 4.4 or later	Google Chrome on Android Good Browser on Android
iOS 10.0 or later	Apple Safari on iOS Good Browser on iOS
Windows 10 (Mobile browser app only)	Microsoft Edge on Windows 10 phones only

EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

Operating System and Version Requirements	Mobile Browser Requirements*
Windows 8.1 (Mobile browser app only)	Microsoft Internet Explorer 11 on Windows 8.1 phones only (Support ends December 17, 2017)

* Mobile browser requirements apply to the Salesforce1 mobile browser app only.

- The latest mobile browser version is required.
- When using the mobile browser app, we recommend turning off Incognito Mode in Chrome, Private Browsing in Safari, or InPrivate Browsing in Edge or Internet Explorer.

Mobile Devices Used for Salesforce1 Testing

Salesforce performs automated and manual testing of the Salesforce1 downloadable and mobile browser apps on a select set of mobile devices. This is the current list of devices used for Salesforce1 testing.

Platform	Phones	Tablets
Android	 Google Nexus 5X Google Nexus 6P Samsung Galaxy S7 Samsung Galaxy S6 Samsung Galaxy S5 Samsung Galaxy S4 Samsung Galaxy Note 4 	 Samsung Galaxy Tab S2 Samsung Galaxy Tab A 8.0
iOS	 iPhone 7 / 7 Plus iPhone 6S / 6S Plus iPhone 6 / 6 Plus iPhone 5S iPhone SE 	 iPad Pro (9.7" and 12.9") iPad Air 2 iPad Mini 4
Windows (Mobile browser app only)	Nokia 1020 (with Windows 8.1)Lumia 950 (with Windows 10)	• n/a

Customers aren't blocked from using Salesforce1 on untested devices as long as they meet current platform requirements. The list of Salesforce1-tested devices is subject to change, with or without advance notice.

Note: Salesforce treats touch-enabled laptops, including Microsoft Surface and Surface Pro devices, as laptops instead of tablets. It's not possible to access Salesforce1 on these devices. Users are always redirected to the full site experience that's enabled for them—Lightning Experience or Salesforce Classic. Only standard keyboard and mouse inputs are supported on these types of devices.

On most devices, Salesforce1 is supported in portrait orientation only. The one exception is when using the Salesforce1 downloadable app on iPad tablets, where both portrait and landscape orientation are supported.

Salesforce Editions and Licenses

See which Salesforce editions and user license types support using Salesforce1.

Salesforce Editions

Salesforce1 is available in these editions:

- Personal Edition
- Group Edition
- Professional Edition
- Enterprise Edition
- Performance Edition
- Unlimited Edition
- Developer Edition
- Contact Manager Edition

User License Types

These user license types can access Salesforce1. A special Salesforce1 or mobile license isn't required.

- Salesforce users
- Salesforce Platform and Force.com users
- Chatter Plus users (also known as Chatter Only), Chatter Free users, and Chatter External users^{*}
- Customer Community, Customer Community Plus, and Partner Community external users
- Portal users who are a member of a Salesforce community

These user license types don't have access to the mobile app:

- Portal users (unless a member of a Salesforce community)
- Database.com users

But not in these editions:

•

Database.com Edition

- Sites and Site.com users
- Data.com users
- Work.com users

Note: You can access the same data and functionality that's available to you in the full site, as determined by your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets.

*Chatter Plus, Chatter Free, and Chatter External users must have the "API Enabled" profile permission turned on to use any of the Salesforce1 downloadable apps. Chatter External users who have API access can't access Groups or People list views when using a downloadable app.

Wireless Connection

A Wi-Fi[®] or cellular network connection is needed to communicate with Salesforce. For cellular connections, a 3G network or faster is required. For the best performance, we recommend using Wi-Fi or LTE.

If you're using one of the Salesforce1 downloadable apps, you can view your most recently accessed records, and create and edit records, when your device is offline.

SEE ALSO:

Locale and Language Support for the Salesforce1 App Salesforce1 Mobile App Accessibility Considerations What Data Is Available in the Salesforce1 Mobile App?

What Data Is Available in the Salesforce1 Mobile App?

Salesforce1 uses your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets to determine the data that's available to you. You see most of the objects, record types, fields, and page layouts that you do when working in the full Salesforce site. But not all Salesforce data is available in Salesforce1.

These objects are available as items in the Salesforce1 navigation menu. You can create, view, and edit records for these objects unless noted otherwise.

- Accounts
- Assets
- Campaigns
- Cases
- Contacts
- Content Libraries (iOS downloadable app only)
- Contracts
- D&B Company (view only, for Data.com Prospector and Data.com Clean customers)
- Dashboards (view only)
- Events
- Files
- Field Service Lightning (Operating Hours, Service Appointments, Service Resources, Service Territories, Work Types) (mobile browser app only)
- Forecasts (iOS downloadable app only)
- Knowledge Articles (view only)
- Leads
- Live Chat Transcripts
- Opportunities
- Orders
- Quotes (create from opportunities only)
- Reports (*view only*)
- Social Personas and Social Posts
- Tasks
- Work.com Coaching, Goals, Thanks, Rewards, and Skills (Skills not available in the iOS downloadable app)
- Work Orders
- Custom objects that have a tab you can access
- Salesforce Connect external objects that are searchable and have a tab you can access

With some exceptions, all the standard and custom fields are available on these records. And you can work with most of the related lists for these objects.

If Chatter is enabled, you can access feeds, groups, people (user profiles), and topics. (Topics is available in the mobile browser app only.) You can access user profiles even if Chatter is disabled.

If you're using a Salesforce1 downloadable app, you can use Salesforce Today to prepare for meetings, stay in touch with customers, quickly join conference calls, and generally manage your day.

EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

Salesforce1 Navigation Menu

You can access all these objects from the Salesforce1 navigation menu. The navigation menu helps you focus on the objects you work with most frequently. Tap **More** at the bottom of the Recent section to see the full list of all objects available to you in Salesforce1.



Tip: If you're new to Salesforce and don't yet have a history of recent items, you initially see these objects in the Recent section of the Salesforce1 navigation menu: Accounts, Cases, Contacts, Files, Groups (unless added directly to the navigation menu), Leads, Opportunities, and People (unless added directly to the navigation menu).

As you spend time working in Salesforce1 and the full Salesforce site, the objects that you use the most eventually replace the default ones in the Recent section and become the objects that are available for global searches in Salesforce1.

It can take up to 15 days for the objects that you work with regularly to appear in the Recent section. To make objects appear under Recent immediately, pin them from your search results in the full site.

When doing a global search in Salesforce1, you can find records for the objects that appear in the Recent section only. To find records for the other objects that are in the full object list when the Recent section is expanded, search from the object's home page.

Why Can't I Log in to the Salesforce1 Mobile App?

You're certain that you're using your correct Salesforce credentials but you can't log in to Salesforce 1? There are several common reasons why you might be having trouble.

• Make sure that you actually have permission to use Salesforce 1. Salesforce admins can control who's able to use the Salesforce 1 downloadable apps and can also disable access to the mobile browser app, for you or your entire company. If you're not sure that you have access, check with your admin.

EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

If you're using a downloadable app, make sure you're logging in to the correct instance—production, sandbox, or a custom domain. By default, Salesforce1 connects to your production environment. If your organization uses single sign-on, configure the app to point to a different page during login. The same is true to connect Salesforce1 to a sandbox environment for testing purposes or to log in using a Community URL.

A custom domain is in the form of https://universalcontainers.my.salesforce.com, where universalcontainers is a name selected by your admin. Your admin can provide you with the domain name to use.

- To connect the downloadable app for iOS to a different instance, use these steps.
- To connect the downloadable app for Android to a different instance, use these steps.
- Make sure that your username and password are stored correctly if you're using a password manager app such as 1Password[™] or LastPass[™]. (Your Salesforce admin must first set up password management for your org. Using a password manager app to log in is available with the Salesforce1 downloadable app for iOS, version 11.0 or later).

If you're still unable to log in, ask your admin for help.

SEE ALSO:

Get the Salesforce1 Mobile App Requirements for the Salesforce1 Mobile App

Turn the Salesforce1 Mobile Browser App Off or On

When the Salesforce1 mobile browser app is enabled for your organization, you automatically redirect to this experience when you log in to Salesforce from a supported mobile browser. Using the full Salesforce site in a mobile browser isn't supported. But it is possible to turn off the mobile browser app if you need to access Salesforce Classic from your mobile device for awhile.



Note: If you disable automatic redirection to the Salesforce1 mobile browser app, you're turning off automatic access for any supported browser, on any of your mobile devices. For example, if you turn off the mobile browser app from your tablet, you won't be able to use the mobile browser app on your smartphone either.

These steps don't affect the Salesforce1 downloadable apps which always display the Salesforce1 interface.

To turn off the mobile browser app from within the app:

- **1.** Tap **=**.
- 2. Tap Full Site.

You switch immediately to the Salesforce Classic full site. It's not possible to access Lightning Experience from any mobile browser.

The full site is now your default environment whenever you log in from a mobile browser. You can switch back to the Salesforce1 mobile browser app using the **Go to Salesforce1** link in the full site footer, after which Salesforce1 returns to being your default environment.

To turn off the mobile browser app from the full site:

- 1. From your personal settings, enter *Advanced User Details* in the Quick Find box, then select **Advanced User Details**. No results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**.
- 2. Deselect Salesforce1 User.
- 3. Save your changes.

To turn the Salesforce1 mobile browser app back on from the full site, repeat the previous steps and select the Salesforce1 User checkbox.

SEE ALSO: Get the Salesforce1 Mobile App

Find Help in the Salesforce1 Mobile App

Salesforce1 includes a **Help** link that you can use to learn about the mobile app.

The **Help** link is located at the bottom of the Salesforce1 navigation menu. Tap \equiv to open the navigation menu.

And there are a lot of other resources that can help you get started with Salesforce1. Check out Help Resources for the Salesforce1 Mobile App on page 134.

EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

EDITIONS

Salesforce1 mobile app available in: **All** editions except Database.com

Help Resources for the Salesforce1 Mobile App

These resources provide information about using the Salesforce1 mobile app, setting up your organization to use the app, and developing for the app.

Getting Started with Salesforce1

Trailhead	
Salesforce1 Basics for Users	HTML
Guides	
Using the Salesforce1 App	PDF
Help Topics	
Introduction to the Salesforce1 Mobile App	HTML
Salesforce1 Mobile App Features: What's Available in Each Version	HTML
Requirements for the Salesforce1 Mobile App	HTML
What Data Is Available in the Salesforce1 Mobile App?	HTML
Get the Salesforce1 Mobile App	HTML
What's Different or Not Available in the Salesforce1 Mobile App	HTML
Help in the App	
Salesforce1 Help	HTML
Salesforce1 Videos	
Take Your Tasks from Desktop to Mobile (Salesforce Classic)	Video
Accounts and Contacts on the Go (Salesforce Classic)	Video
How to Use Notes	Video

Setting Up and Customizing Salesforce1

Release Notes

Salesforce1 Section in the Salesforce Spring '17 Release Notes	PDF	HTML
Trailhead		
Salesforce1 Rollout		HTML
Salesforce1 Mobile Basics		HTML
Salesforce1 Security and Compliance		HTML
Guides		

Salesforce1 mobile app available in: **All** editions except Database.com

Salesforce1 Mobile App Admin Guide	PDF	HTML
Salesforce1 App Admin Rollout Guide		HTML
Help Topics		
Put Salesforce1 In Your Users' Hands		HTML
Salesforce1 Mobile App Setup Options		HTML
How Actions Are Ordered in the Salesforce1 Action Bar		HTML
Your Org's Branding in the Salesforce1 Mobile App		HTML
Enable Visualforce Pages for the Salesforce1 Mobile App		HTML
Work Offline with the Salesforce1 Mobile App		HTML

Developing for Salesforce1

Trailhead

Visualforce Mobile		HTML
Guides		
Salesforce1 App Developer Guide	PDF	HTML
Salesforce1 Mobile URL Schemes for Android and iOS	PDF	
Salesforce1 Mobile Security Guide	PDF	

Salesforce Mobile Classic

The Salesforce Mobile Classic app provides mobile access to your Salesforce data from Android[™] and iPhone® devices. You can view, create, edit, and delete records, keep track of your activities, view your dashboards, run simple reports, and log calls and emails. Your Salesforce admin must assign you a mobile license before you can use Salesforce Mobile Classic.

Note: Supported features may vary depending on your mobile operating system and device model.

Salesforce Mobile Classic stores your Salesforce records in a local database on your mobile device, which means you can use the Salesforce Mobile Classic app even when a data connection is unavailable. Salesforce Mobile Classic periodically polls Salesforce for new and updated records, saving you from the hassle of manually synchronizing your data.

Check the list of supported mobile devices to see if you can use the Salesforce Mobile Classic app on your smartphone.

Installing the Salesforce Mobile Classic App

Installing the Salesforce Mobile Classic App

You can install the Salesforce Mobile Classic app on any supported Android or iPhone device.

The easiest way to install Salesforce Mobile Classic is to visit

http://mobile.salesforce.com from your mobile device and follow the on-screen instructions.

Or, you can use the installation steps for your type of device.

Android Installation

Salesforce Mobile Classic is available for download from Google Play. To access Google Play, your Android device must be connected to the network. You also need a Google account to download applications. If you don't already have a Google account, go to

https://accounts.google.com and select Sign up to set one up.

To install Salesforce Mobile Classic from Google Play:

- 1. From the Apps screen of your Android device, select the Google Play Store.
- 2. Select the Search field, and type salesforce.
- 3. Select Salesforce Mobile Classic from the search results.
- 4. Select Download.
- 5. Tap Accept and Download if you agree to the terms.
- 6. Select **Open** to launch the application.

EDITIONS

Salesforce Mobile Classic setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: Performance, Unlimited, and **Developer** Editions for orgs created prior to Winter '17

Mobile app available for an extra cost in: Professional and Enterprise Editions for orgs created prior to May 1, 2016

Mobile app not available for orgs created in Winter '17 or later

EDITIONS

Salesforce Mobile Classic setup available in: both Salesforce Classic and **Lightning Experience**

Mobile app available in: Performance, Unlimited, and **Developer** Editions for orgs created prior to Winter '17

Mobile app available for an extra cost in: Professional and Enterprise Editions for orgs created prior to May 1, 2016

Mobile app not available for oras created in Winter '17 or later

- 7. The first time you launch the Salesforce Mobile Classic app on your device, you must activate the app for your device by logging in and downloading data. Verify that your phone is connected to a network.
 - a. Select I Accept.
 - **b.** On the activation screen, enter your Salesforce username and password.
 - c. Select Activate.

Depending on your organization's setup, you might need to set up a passcode before accessing the app.

iPhone Installation

Salesforce Mobile Classic is available for download from Apple's App Store. To use the App Store, your iPhone or iPod touch must be connected to the network. You also need an iTunes[™] Store account to download applications. If you don't already have an iTunes Store account, open iTunes on your computer and select **Store** > **Account** to set one up.

To install Salesforce Mobile Classic from the App Store:

- 1. From the Home screen of your iPhone or iPod touch, select the App Store icon.
- 2. Tap Search.
- 3. Tap within the Search field to open the keyboard. Type *salesforce*.
- 4. Select Salesforce Mobile Classic in the list of search results to view information about the application.
- 5. Tap Free, and then tap Install.

Note: There's no charge to download the app from the App Store. But only users in Enterprise, Professional, Unlimited, Performance, or Developer Editions who've been assigned a mobile license can run Salesforce Mobile Classic.

- 6. Enter your iTunes Store account and password and tap OK.
- 7. The first time you launch Salesforce Mobile Classic, you must activate the app for your device by logging in and downloading data. Verify that your device is connected to a network.
 - a. Tap the Salesforce icon on the Home screen.
 - b. Tap I Accept.
 - c. On the activation screen, enter your Salesforce username and password.
 - d. Tap Activate.

Warning: If the application closes or the device locks during the activation process, the iPhone operating system pauses the download process but it will resume the next time you open the app.

Depending on your organization's setup, you might need to set up a passcode before accessing the app.

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