salesforce

Set Up and Maintain Sales Tools

Salesforce, Spring '17

'17

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SET UP AND MAINTAIN SALES TOOLS

Sales Cloud Einstein

Supercharge your team's sales productivity at every step of the sales process with key predictions, intelligent recommendations, and timely automation. Sales Cloud Einstein is your own data science department that learns from your team's sales activities and CRM data and helps you identify the best leads, convert opportunities more efficiently, and retain customers with ease.

📝 **Note:** For pricing details, contact your Salesforce account executive.

IN THIS SECTION:

Automated Activity Capture
Say goodbye to logging. Say hello to smarter selling. Connect your email and calendar to Salesforce. Then, your emails and events are automatically logged on related Salesforce records. Plus, emails sent from Salesforce go through your email account.

Predictive Lead Scoring
Predictive Lead Scoring shows you which of your leads best fit your company's successful conversion patterns.

Opportunity Insights
Provide your sales reps relevant updates about their opportunities to help them win more deals. They get predictions about which deals are likely to be won, reminders to follow up, and notifications when key moments in a deal take place.

Account Insights
Let artificial intelligence help your sales team maintain their relationships with customers. With Account Insights, your team stays informed about key business developments that affect their customers.

Considerations for Setting Up Sales Cloud Einstein
Before setting up Sales Cloud Einstein, review considerations about your org's default sharing settings and installed packages added to your org.

Set Up Sales Cloud Einstein
Follow the steps in the Sales Cloud Einstein Setup Assistant, including selecting who can use Einstein and enabling Einstein features. You also configure pages and list views so users can see insights.

EDITIONS
Available in: Lightning Experience
Available at an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

Automated Activity Capture

Say goodbye to logging. Say hello to smarter selling. Connect your email and calendar to Salesforce. Then, your emails and events are automatically logged on related Salesforce records. Plus, emails sent from Salesforce go through your email account.

IN THIS SECTION:

Connect Your Email and Calendar to Salesforce with Automated Activity Capture
After Automated Activity Capture is enabled, Salesforce asks you to connect your Google™ or Microsoft® Office 365® account to Salesforce.

EDITIONS
Available in: Lightning Experience
Available for an extra cost with Sales Cloud Einstein and Inbox in: **Enterprise**, **Performance**, and **Unlimited** Editions

Control How Activities Are Shared

From your personal settings, you can choose to share activities added by Automated Activity Capture. You can share with everyone, with Chatter groups, or with no one. Only Automated Activity Capture users can share their emails and events.

Control Which Activities Are Added to Salesforce

Add people's email addresses to your Excluded Addresses list. Then, emails and events with those people aren't added to Salesforce by Automated Activity Capture.

Review Activity Reports

Activities added to Salesforce with Automated Activity Capture don't show up in standard or custom Salesforce reports. However, Automated Activity Capture comes with activity reports that provide a summary of all activities, including those added with Automated Activity Capture.

Set Up a Group for Sharing Activities

The group's owner or manager canenable email and event sharing for the group. Only Automated Activity Capture users can share with groups.

Guidelines for Using Automated Activity Capture

Review how long it takes for emails and events to be added to Salesforce, platform encryption details, and more.

Give Users Access to Activity Reports

Automated Activity Capture comes with five Wave app permission set licenses. If a license and its related system permissions are assigned to users, they can access the activity reports from the Einstein Analytics tab.

Let Users Share Activities with Groups

Add the `Enable email and event sharing` field to group layouts. Then, when it's selected on a group, the group can be used to share activities from Automated Activity Capture.

Control Which Activities Are Added to Salesforce for All Users

Add email addresses or domains to the Excluded Addresses list for your org. Then, emails and events with those people or companies aren't added to Salesforce by any Automated Activity Capture users.

Automated Activity Capture Limitations

To better understand how Automated Activity Capture works and get the most out of it, review some email, calendar, and reporting limitations.

SEE ALSO:

Connect Your Email and Calendar to Salesforce with Automated Activity Capture

After Automated Activity Capture is enabled, Salesforce asks you to connect your Google™ or Microsoft® Office 365® account to Salesforce.
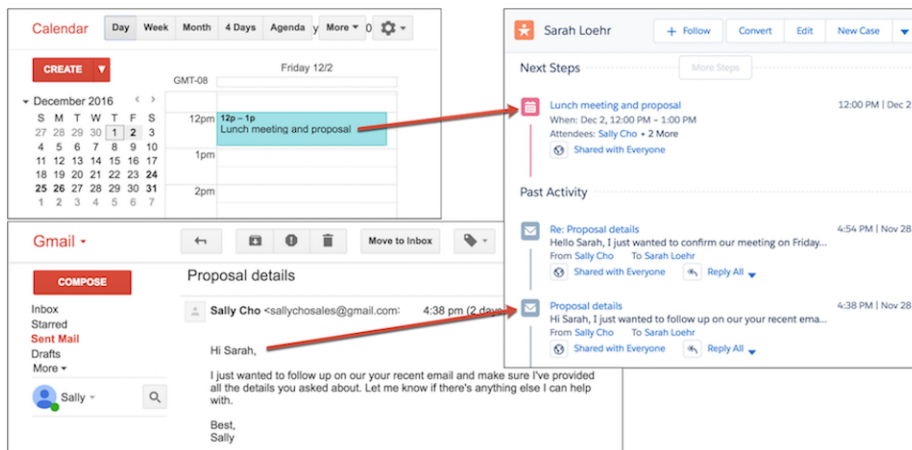
If Salesforce does not ask you to connect your account or you want to connect a new account, follow these steps. You can connect up to five Google™ and Microsoft® Office 365® email and calendar accounts.

1. From your personal settings, enter `Automated Activity Capture` in the `Quick Find` box, then select **Settings** under Automated Activity Capture.

2. Under Connected Accounts, click **New Account**.
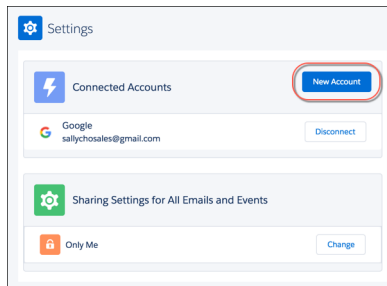
3. Follow the steps to connect an account.

After you connect an account, it takes up to 24 hours for Automated Activity Capture to add your emails and events to related Salesforce records. For Gmail accounts, emails and events from the past 6 months are added to Salesforce. For Office 365 accounts, emails and events from the past 2 years are added.

SEE ALSO:

Guidelines for Using Automated Activity Capture

Automated Activity Capture

Control How Activities Are Shared

From your personal settings, you can choose to share activities added by Automated Activity Capture. You can share with everyone, with Chatter groups, or with no one. Only Automated Activity Capture users can share their emails and events.

1. From your personal settings, enter `Automated Activity Capture` in the `Quick Find` box, then select **Settings** under Automated Activity Capture.

2. Under Sharing Settings for All Emails and Events, click **Change**.

3. Select who you want to share your emails and events with. If you share with groups, you can choose up to 20 groups.

Your sharing setting is applied to *all your emails and events*, except those that you've individually set sharing for. To set sharing setting for an individual email or event, find the email or event on the activity timeline and select a new sharing setting.
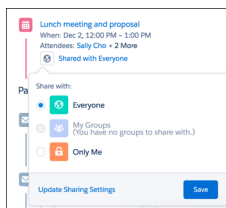
SEE ALSO:

[Automated Activity Capture](#)

Control Which Activities Are Added to Salesforce

Add people's email addresses to your Excluded Addresses list. Then, emails and events with those people aren't added to Salesforce by Automated Activity Capture.

1. From personal settings, enter **Excluded Addresses** in the `Quick Find` box, then click **Excluded Addresses**.

2. Update the Excluded Addresses list.

SEE ALSO:

[Control Which Activities Are Added to Salesforce for All Users](#)

[Automated Activity Capture](#)

Review Activity Reports

Activities added to Salesforce with Automated Activity Capture don't show up in standard or custom Salesforce reports. However, Automated Activity Capture comes with activity reports that provide a summary of all activities, including those added with Automated Activity Capture.

📝 **Note:** If you don't see the Einstein Analytics tab, ask your Salesforce admin to give you access.

1. Click the **Einstein Analytics** tab.
2. Review the Wave activity reports.
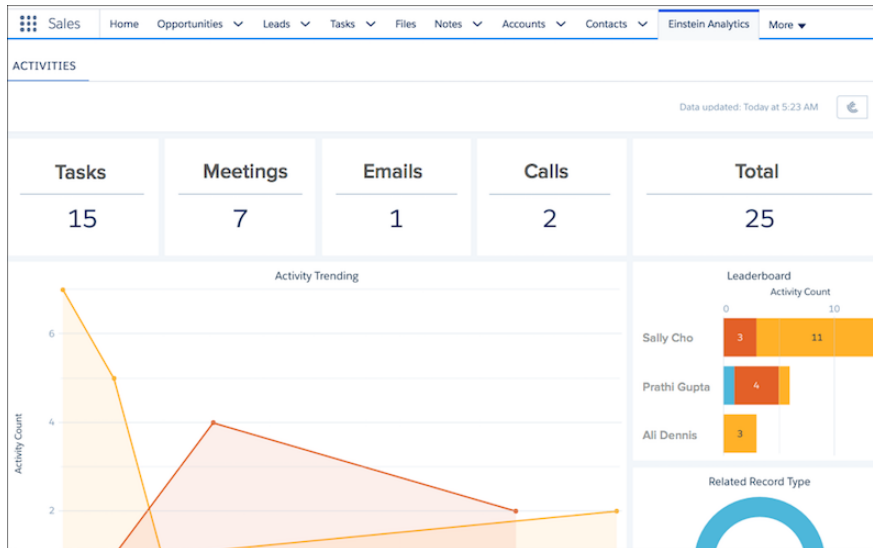
SEE ALSO:

Give Users Access to Activity Reports

Automated Activity Capture

Set Up a Group for Sharing Activities

The group's owner or manager can enable email and event sharing for the group. Only Automated Activity Capture users can share with groups.

1. Click the **Groups** tab.
2. Create or update a group.
3. Select `Enable email and event sharing`. If this option isn't available, ask your Salesforce administrator to add it to the group layout.

4. Save the group.

Members of this group who automatically add their emails and events to Salesforce with Automated Activity Capture can choose to share their emails and events with the group.

SEE ALSO:

Let Users Share Activities with Groups

Control How Activities Are Shared

Automated Activity Capture

Guidelines for Using Automated Activity Capture

Review how long it takes for emails and events to be added to Salesforce, platform encryption details, and more.

- Emails sent from Salesforce go through your connected email account, so they come from you and not from Salesforce.

- After you connect your account to Salesforce, it takes up to 24 hours for all your activities to be added to Salesforce.

- Only sales reps who have connected their email and calendar with Automated Activity Capture can see emails and events in Salesforce that were added with Automated Activity Capture.

- It takes up to 24 hours for all your emails and events to be added.

- If two (or more) contacts or leads have the same email address, Salesforce adds related emails or events to both records. If one of those records is related to an account or opportunity, only emails and events from the most recently updated record show up on the account or opportunity.

- When you share an individual email or event with a group and then delete that group, the setting for the individual email or event is removed.

- If you connect a Google account, Google events are added to your Salesforce calendar.

EDITIONS

Available in: Lightning Experience

Available for an extra cost with Sales Cloud Einstein and Inbox in: **Enterprise**, **Performance**, and **Unlimited** Editions

- For Google accounts, Salesforce adds emails and events from the last six months. For Office 365 accounts, Salesforce adds emails and events from the last two years. Email attachments aren't added to Salesforce.

- All senders and recipients own an email. All guests own an event. Only the owner of an email or event can control how its full contents are shared in Salesforce. If multiple people own an email or event, the most permissive settings win. For example, you share an email with three groups. Your colleague shares the email with two other groups. Then, the email is shared with all five groups.

- If Platform Encryption is enabled for your org, emails and events added to Salesforce don't show the names of encrypted contacts and leads.

- To disable Automated Activity Capture from Setup, Salesforce administrators can enter `Settings` in the `Quick Find` box, then select **Settings** under Automated Activity Capture.
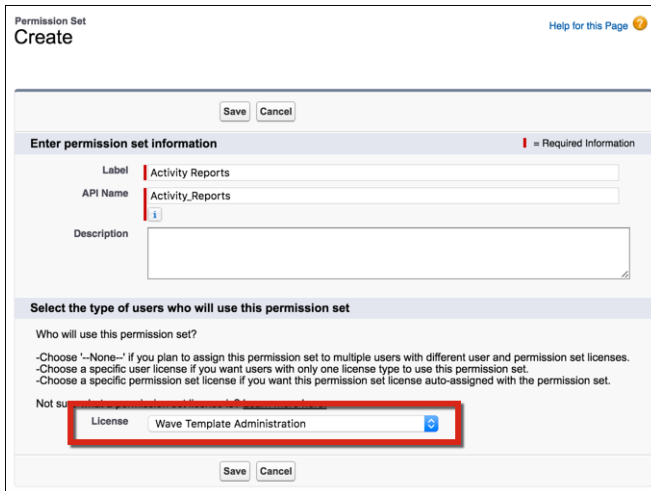
SEE ALSO:

Automated Activity Capture

Give Users Access to Activity Reports

Automated Activity Capture comes with five Wave app permission set licenses. If a license and its related system permissions are assigned to users, they can access the activity reports from the Einstein Analytics tab.

Warning: If you give sales reps access to activity reports, they may see data that's normally hidden from them by access settings or field-level security.

1. Make sure Automated Activity Capture is enabled.

2. Create a permission set.

3. From the `License` drop-down list, select the **Wave Template Administration** permission set license.

EDITIONS
Available in: Lightning Experience
Available for an extra cost with Sales Cloud Einstein and Inbox in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS
To give users access to activity reports:
• "Customize Application" and "Modify All Data"

4. Click **Save**.

5. Click **System Permissions**.

6. Click **Edit** and enable the Download Wave Analytics Data, Manage Wave Analytics Templated Apps, and Use Wave Analytics Templated apps system permissions.
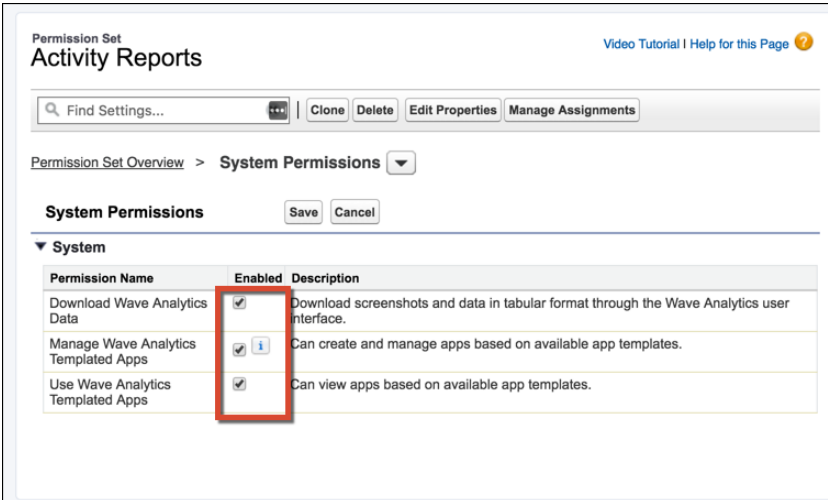
7. Click **Save**.

8. Assign the permission set to users.

Assigned users can view activity reports from the Einstein Analytics tab.

SEE ALSO:

Review Activity Reports

Enable Automated Activity Capture for Sales Cloud Einstein

Enable Automated Activity Capture for Inbox

Let Users Share Activities with Groups

Add the `Enable email and event sharing` field to group layouts. Then, when it's selected on a group, the group can be used to share activities from Automated Activity Capture.

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

2. Add the `Enable email and event sharing` field to group layouts.
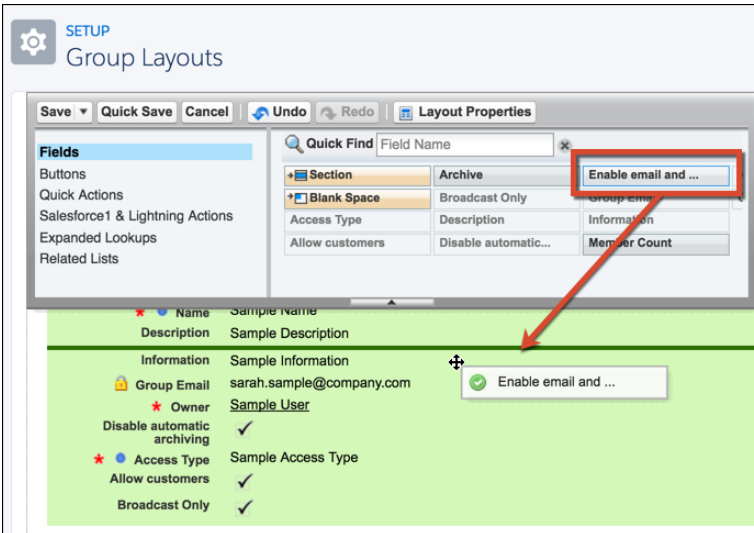
To use a group for sharing emails and events, the group's owner can select `Enable email and event sharing` on the group's settings. Then, members of the group can share their emails and events with the group.

SEE ALSO:

Control How Activities Are Shared

Control Which Activities Are Added to Salesforce for All Users

Add email addresses or domains to the Excluded Addresses list for your org. Then, emails and events with those people or companies aren't added to Salesforce by any Automated Activity Capture users.

> 💡 Tip: Make sure your company's domain is added to your org's Excluded Addresses list. Then, emails just between your users aren't added to Salesforce.

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

2. Update the Excluded Addresses list.

SEE ALSO:

Control Which Activities Are Added to Salesforce

EDITIONS

Available in: Lightning Experience

Available for an extra cost with Sales Cloud Einstein and Inbox in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To update the org's Excluded Addresses list:
- "Customize Application" and "Modify All Data"

Automated Activity Capture Limitations

To better understand how Automated Activity Capture works and get the most out of it, review some email, calendar, and reporting limitations.

General Limitations

- Automated Activity Capture is only available to customers with Sales Cloud Einstein or Inbox.
- Alerts in the Assistant don't reflect emails and events that were added to Salesforce with Automated Activity Capture.
- The `Last Activity Date` field on accounts, contacts, leads, opportunities, and person accounts doesn't reflect emails and events that were added to Salesforce with Automated Activity Capture.

Email Limitations

- If multiple contacts or leads have the same email address, Salesforce adds related emails or events to both records. If one of those records is related to an account or opportunity, only emails and events from the most recently updated record show up on the account or opportunity.
- After connecting your email and calendar to Salesforce with Automated Activity Capture, you can't send emails from Salesforce using an organization-wide email address. Emails sent from Salesforce go through your connected email account.

Calendar Limitations

- If you update a Google™ or Microsoft® Office 365® calendar event that started two or more days ago, the update isn't reflected in Salesforce.
- Changes to events in Salesforce are not reflected on Google or Office 365 calendars.
- Salesforce adds Google events to your Salesforce calendar but not Office 365 events.
- Your Salesforce calendar doesn't show Google events starting more than a month before and ending more than a month after the period that you're viewing.

Reporting Limitations

- Activities added to Salesforce with Automated Activity Capture don't show up in standard Salesforce reports. However, Automated Activity Capture includes activity reports that provide a summary of sales activities, including those added with Automated Activity Capture.
- Activity reports only include activities from the previous 90 days, and they don't include any future events.

SEE ALSO:

Automated Activity Capture

Predictive Lead Scoring

Predictive Lead Scoring shows you which of your leads best fit your company's successful conversion patterns.

IN THIS SECTION:

See Which Leads Are Most Likely to Convert with Predictive Lead Scoring
Use artificial intelligence to score your leads by how well they fit your company's successful conversion patterns. Let your sales team prioritize their leads by lead score. See which fields influence each lead score most.

SEE ALSO:

Enable Predictive Lead Scoring

Set Up Sales Cloud Einstein

Sales Cloud Einstein

See Which Leads Are Most Likely to Convert with Predictive Lead Scoring

Use artificial intelligence to score your leads by how well they fit your company's successful conversion patterns. Let your sales team prioritize their leads by lead score. See which fields influence each lead score most.

Einstein Predictive Lead Scoring uses a combination of data science and machine learning to discover the patterns of lead conversion in your business, and to predict which current leads to prioritize. By using machine learning, Predictive Lead Scoring provides a simpler, faster, and more accurate solution than traditional rules-based lead scoring approaches.

Predictive Lead Scoring analyzes your past leads, including any custom fields, to determine which of your current leads have the most in common with leads that have been successfully converted with opportunities in the past. Predictive Lead Scoring adds a Lead Score field to leads. The Lead Score lets sales reps prioritize their work by ranking leads according to their similarities to prior converted leads. Leads with higher scores have more in common with leads that have converted in the past.

The lead score appears in the Einstein component on lead detail pages. The component also shows sales reps which of the lead's fields had the greatest positive (1) or negative (2) influence on its score. Fields that aren't listed in the Einstein component still influence the score, but less than the fields listed.

When you or your users add the Score field to list views, hovering over a score (1) displays the insights (2) behind the score. When sales reps focus on leads with higher scores, they're likely to convert more of them to opportunities. The lock (3) indicates that the score is read-only.

Predictive Lead Scoring periodically reanalyzes your historical leads and updates the scores for your current leads accordingly.

Predictive Lead Scoring includes a dashboard with reports that show key lead score metrics for your org.

- Average Lead Score by Lead Source
- Conversion Rate by Lead Score
- Lead Score Distribution: Converted and Lost Opportunities

Opportunity Insights

Provide your sales reps relevant updates about their opportunities to help them win more deals. They get predictions about which deals are likely to be won, reminders to follow up, and notifications when key moments in a deal take place.

📝 **Note:** For now, account- and opportunity-related insights are available in English only.

EDITIONS

Available in: Lightning Experience

Available for an extra cost with Sales Cloud Einstein in: **Enterprise**, **Performance**, and **Unlimited** Editions

Opportunity Insights offers notifications about different opportunities precisely when they're needed on the Home page, opportunity records, and in list views.
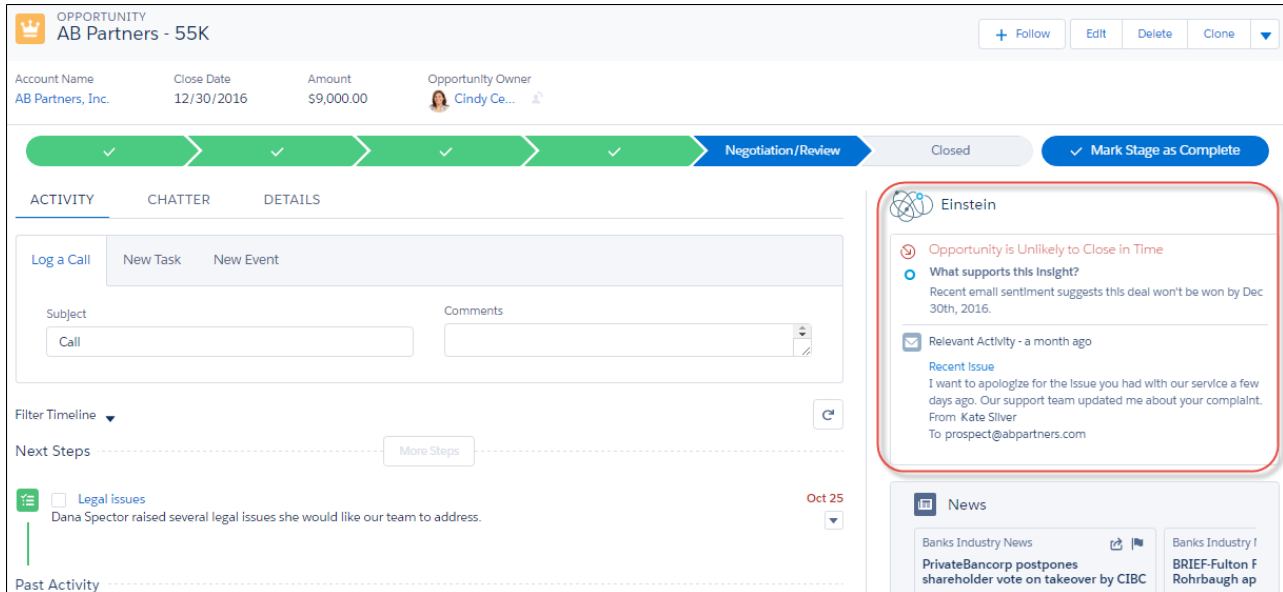
Sales reps can see all the insights related to their deals on the Home page. The Home page also features relevant actions related to different opportunities, such as the ability to edit an opportunity's close date or email a contact who hasn't responded to a request. Reps can also dismiss insights or leave feedback about the relevance of individual insights.

Note: To see the email action on insights, you must create an email global quick action. For more information, see "Create Global Quick Actions" in the Salesforce Help.
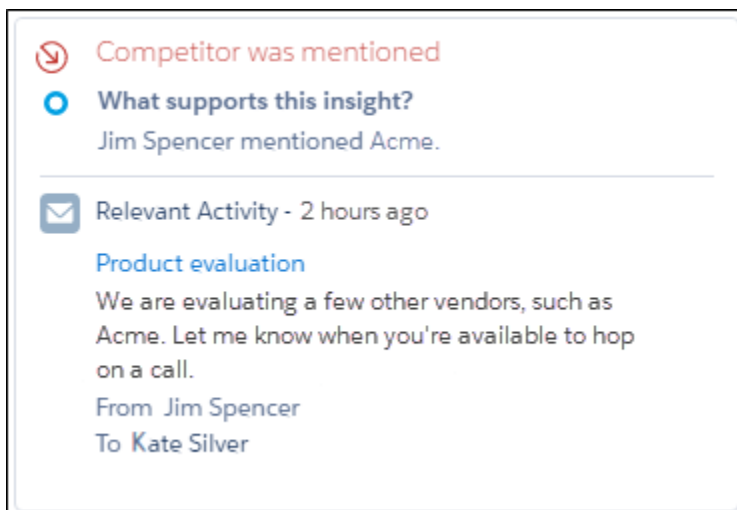
On an opportunity record, reps can see all insights related to an opportunity.

You can also customize list views to show insights.

Opportunity Insights is available with Lightning for Outlook and Lightning for Gmail.

Each insight offers details about why it's shown, tying it to relevant metrics.

Three different types of insights are available.

- Deal Predictions—See predictions based on recent activity and existing opportunity data, such as whether a deal is more or less likely to close, or if a deal seems unlikely to close in time.

- Follow-Up Reminders—Get reminders to follow up when a contact hasn't responded in a while, or if there hasn't been any communication related to an important opportunity for a significant period of time.
- Key Moments—Get notified when key moments related to a deal take place, such as if a contact mentions a competitor or is leaving their company.

Insights are visible to Einstein users with the proper record and activity access, which might include:

- Opportunity owners
- Opportunity team members
- Direct managers of opportunity owners and team members

If the opportunity owners or team members are changed, prior owners and team members can still access related insights. Additionally, all Einstein users that have permission to view an opportunity can see the related insights on the record's detail page.

> **Tip:** Many opportunity-related insights are derived from your reps' activities, such as emails and events. If an insight comes from a private email, then the insight is public, but the email content is not displayed. Privacy settings are determined by the activity owner, so to get the most out of Opportunity Insights, encourage your reps to set their **Sharing Setting for All Emails and Events** to Everyone.

SEE ALSO:

Enable Opportunity Insights

Set Up Sales Cloud Einstein

Sales Cloud Einstein

Account Insights

Let artificial intelligence help your sales team maintain their relationships with customers. With Account Insights, your team stays informed about key business developments that affect their customers.

> **Note:** For now, account- and opportunity-related insights are available in English only.

Knowing what's impacting your customers' companies gives your sales team an edge when deciding whether customers are open to sales. Is the company expanding? Changing executive leadership? Acquiring competitors? Account Insights provides news articles from reputable sources that give your sales team the complete picture.

Insights appear in the Einstein component, which is on account records and the Home page.

EDITIONS

Available in: Lightning Experience

Available for an extra cost with Sales Cloud Einstein in: **Enterprise**, **Performance**, and **Unlimited** Editions

On account records, the account's key fields (including `Account Name` and `Website`) determine what insights are returned. Each record shows up to three insights, and each insight shows up to three of the most relevant articles. All Einstein users with access to the record can see the insights.
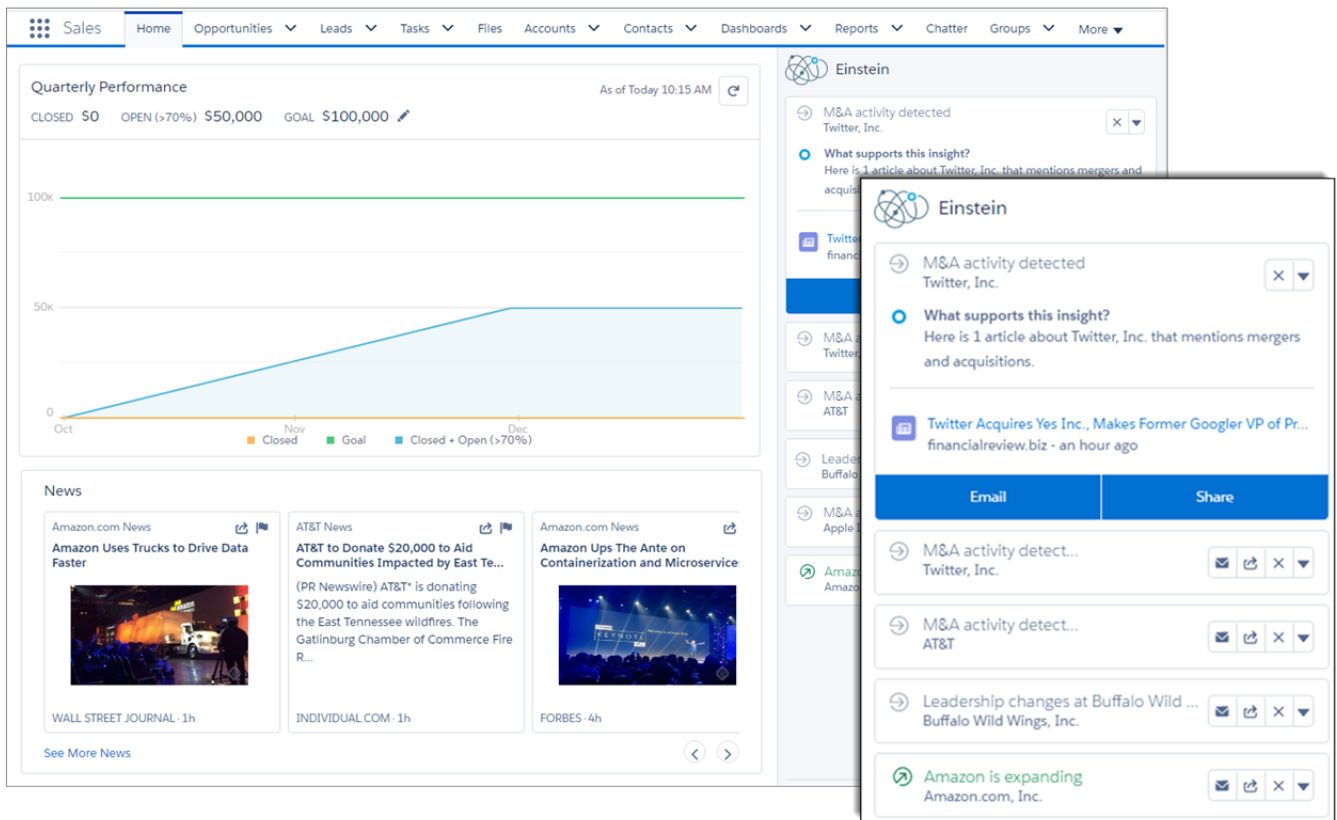
On the Home page, Einstein users see insights based on the accounts they own and the accounts that they're an account team member. Each insight shows up to three of the most relevant articles. A user's manager also has access to these insights. Users can email insights to others or share them with other users and groups through Chatter. Users can also dismiss insights or leave feedback about the relevance of individual insights.

If the Einstein component isn't on page layouts, the admin needs to add it.

Account Insights is available with Lightning for Outlook and Lightning for Gmail.

SEE ALSO:

Enable Account Insights

Set Up Sales Cloud Einstein

Sales Cloud Einstein

Considerations for Setting Up Sales Cloud Einstein

Before setting up Sales Cloud Einstein, review considerations about your org's default sharing settings and installed packages added to your org.

- Sales Cloud Einstein is only available to users with standard Salesforce licenses.

- When you purchase Sales Cloud Einstein, Salesforce installs two packages in your org, SalesforceIQ Cloud and Sales Insights. Each package adds an associated integration user and profile. Salesforce uses these entities to provide insights to your org. If you update these entities, it can affect your org's ability to get insights.

- If you enable Automated Activity Capture, the Assistant may not work as expected. Alerts in the Assistant don't reflect emails and events that were added to Salesforce with Automated Activity Capture. Also, emails that your users send from the Assistant don't go through their Automated Activity Capture email account.

- To use Predictive Lead Scoring:

  - There must be at least 1,000 leads created over the last six months in your Salesforce organization. Lead scores are not generated until you have enough data to make the scores reliable.

  - Your sales reps must be creating opportunities during lead conversion. Predictive Lead Scoring analyzes converted leads with associated opportunities.

  - Your sales reps must have converted at least 120 leads with opportunities over the last six months.

  - Your sales reps must be converting a total of at least 20 leads to opportunities each month, based on leads created in the last six months.

  - Your sales reps should be filling in their lead records thoroughly. If leads have more data, Predictive Lead Scoring generates better insights.

  - Try to eliminate duplicate leads from your org.

- Don't install APEX classes that reference the ScoreIntelligence field provided by Predictive Lead Scoring until after you have enabled Predictive Lead Scoring and received the email confirming that enablement is complete.

EDITIONS

Available in: Lightning Experience

Available for an extra cost with Sales Cloud Einstein in: **Enterprise**, **Performance**, and **Unlimited** Editions

SEE ALSO:

Set Up Sales Cloud Einstein

Sales Cloud Einstein

Set Up Sales Cloud Einstein

Follow the steps in the Sales Cloud Einstein Setup Assistant, including selecting who can use Einstein and enabling Einstein features. You also configure pages and list views so users can see insights.

IN THIS SECTION:

1. Access the Sales Cloud Einstein Setup Assistant

   The Setup Assistant is your guide to selecting Sales Cloud Einstein users and setting up features.

2. Select Who Can Use Sales Cloud Einstein

   Create a permission set with the Sales Cloud Einstein permission set license, enable app permissions for Sales Cloud Einstein features, and assign the permission set to users.

3. Enable Automated Activity Capture for Sales Cloud Einstein

   Access Automated Activity Capture Settings from the Sales Cloud Einstein Setup Assistant. From the Settings page, enable and configure Automated Activity Capture. Automated Activity Capture is required for Opportunity Insights and Account Insights.

4. Enable Predictive Lead Scoring

   Access Predictive Lead Scoring Settings from the Sales Cloud Einstein Setup Assistant. From the Settings page, enable and configure Predictive Lead Scoring.

5. Enable Opportunity Insights

   Access Opportunity Insights Settings from the Sales Cloud Einstein Setup Assistant. From the Settings page, enable and configure Opportunity Insights.

6. Enable Account Insights

   Access Account Insights Settings from the Sales Cloud Einstein Setup Assistant. From the Settings page, enable and configure Account Insights.

SEE ALSO:

Considerations for Setting Up Sales Cloud Einstein

Sales Cloud Einstein

EDITIONS

Available in: Lightning Experience

Available for an extra cost with Sales Cloud Einstein in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To set up Sales Cloud Einstein:
- "Customize Application" and "Modify All Data"

Access the Sales Cloud Einstein Setup Assistant

The Setup Assistant is your guide to selecting Sales Cloud Einstein users and setting up features.

1. From Setup, enter `Sales Cloud Einstein` in the `Quick Find` box, then select **Setup Assistant** under Sales Cloud Einstein.

2. Click **Get Started**, if it's your first time visiting the Setup Assistant.

The Sales Cloud Einstein Setup Assistant shows the tasks you need to complete to set up Sales Cloud Einstein.

Select Who Can Use Sales Cloud Einstein

Create a permission set with the Sales Cloud Einstein permission set license, enable app permissions for Sales Cloud Einstein features, and assign the permission set to users.

1. Create a permission set.

2. From the License drop-down list, select **Sales Cloud Einstein**.

3. Click **Save**.

4. Click **App Permissions**.

5. Enable app permissions for Einstein features.

EDITIONS

Available in: Lightning Experience

Available for an extra cost with Sales Cloud Einstein in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To access the Sales Cloud Einstein Setup Assistant:
- "Customize Application" and "Modify All Data"

EDITIONS

Available in: Lightning Experience

Available for an extra cost with Sales Cloud Einstein in: **Enterprise**, **Performance**, and **Unlimited** Editions
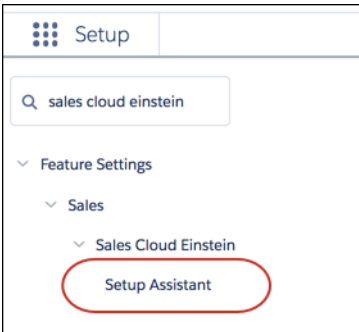
USER PERMISSIONS

To select who can use Sales Cloud Einstein:
- "Customize Application" and "Modify All Data"
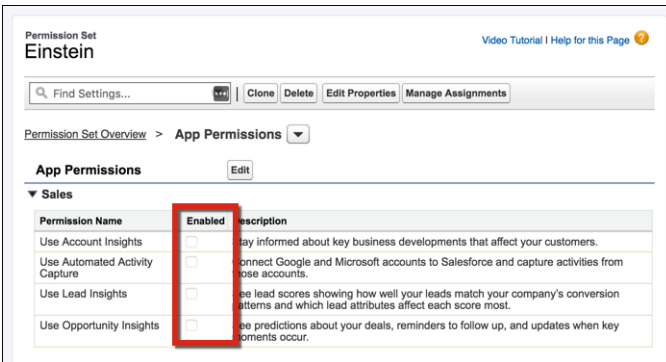
6. Assign the permission set to users.

SEE ALSO:

Sales Cloud Einstein

Enable Automated Activity Capture for Sales Cloud Einstein

Access Automated Activity Capture Settings from the Sales Cloud Einstein Setup Assistant. From the Settings page, enable and configure Automated Activity Capture. Automated Activity Capture is required for Opportunity Insights and Account Insights.

1. From Setup, enter `Sales Cloud Einstein` in the `Quick Find` box, then select **Setup Assistant** under Sales Cloud Einstein.

2. If it's your first time visiting the Sales Cloud Einstein Setup Assistant, click **Get Started**.
The Sales Cloud Einstein Setup Assistant shows all the steps you need for Sales Cloud Einstein deployment, including how to select Einstein users. Only Einstein users can use Einstein features, including Automated Activity Capture.

3. Click **Set Up** next to Automated Activity Capture.

4. On the Settings page, click **Enable**.

5. Configure additional Automated Activity Capture settings.

After you enable Automated Activity Capture, Salesforce asks assigned Sales Cloud Einstein users to connect their Google™ or Microsoft® Office 365® account to Salesforce. It takes up to 24 hours for their emails and events to be initially added to Salesforce.

EDITIONS

Available in: Lightning Experience

Available for an extra cost with Sales Cloud Einstein and Inbox in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To enable Automated Activity Capture:
- Customize Application and Modify All Data

Remove the `Last Activity Date` field from page layouts for accounts, contacts, leads, opportunities, and person accounts. This field doesn't reflect emails and events added to Salesforce with Automated Activity Capture.

SEE ALSO:

Control Which Activities Are Added to Salesforce for All Users

Give Users Access to Activity Reports

Let Users Share Activities with Groups

Select Who Can Use Sales Cloud Einstein

Connect Your Email and Calendar to Salesforce with Automated Activity Capture

Automated Activity Capture

Enable Predictive Lead Scoring

Access Predictive Lead Scoring Settings from the Sales Cloud Einstein Setup Assistant. From the Settings page, enable and configure Predictive Lead Scoring.

1. From Setup, enter `Sales Cloud Einstein` in the `Quick Find` box, then select **Setup Assistant** under Sales Cloud Einstein.

EDITIONS
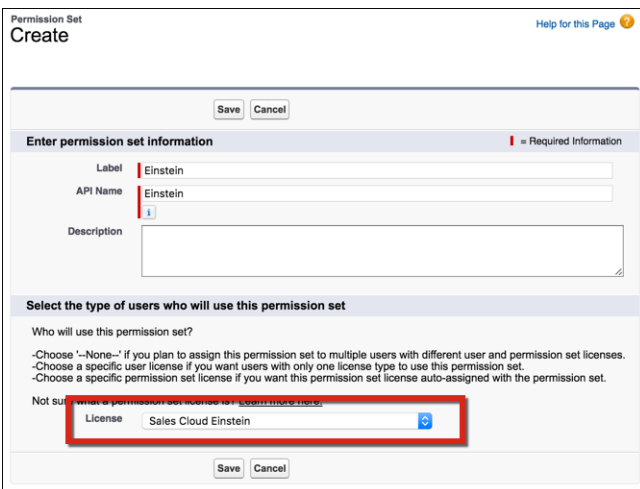
Available in: Lightning Experience

Available for an extra cost with Sales Cloud Einstein in: **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To enable Predictive Lead Scoring:
- Customize Application and Modify All Data
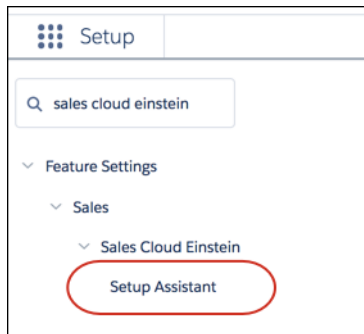
2. If it's your first time visiting the Sales Cloud Einstein Setup Assistant, click **Get Started**.
   The Sales Cloud Einstein Setup Assistant shows all the steps you need for Sales Cloud Einstein deployment, including how to select Einstein users. Only Einstein users can use Einstein features, including Predictive Lead Scoring.

3. Click **Set Up** next to Predictive Leading Scoring.

4. On the Settings page, click **Enable**.

5. Using the Lightning App Builder, make sure that the Einstein component was added to the Home page and to Lightning pages for leads.

6. After insights are available, add the `Score` field to public lead list views. Salesforce automatically adds this field to default list views.

Sales Cloud Einstein users see insights on the Einstein component. It takes up to 24 hours for insights to be available.

💡 Tip: To get the most out of Lead Insights, tell sales reps to add the `Score` field to their lead list views.

SEE ALSO:

Select Who Can Use Sales Cloud Einstein

Predictive Lead Scoring

Enable Opportunity Insights

Access Opportunity Insights Settings from the Sales Cloud Einstein Setup Assistant. From the Settings page, enable and configure Opportunity Insights.

📝 **Note:** To use Opportunity Insights, you must enable Automated Activity Capture.

1. From Setup, enter `Sales Cloud Einstein` in the `Quick Find` box, then select **Setup Assistant** under Sales Cloud Einstein.
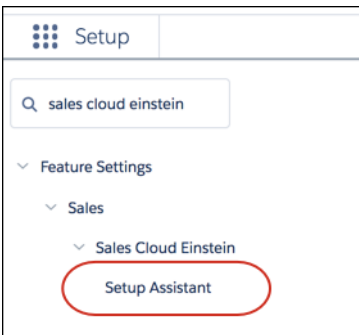
2. If it's your first time visiting the Sales Cloud Einstein Setup Assistant, click **Get Started**.
The Sales Cloud Einstein Setup Assistant shows all the steps you need for Sales Cloud Einstein deployment, including how to select Einstein users. Only Einstein users can use Einstein features, including Opportunity Insights.

3. Click **Set Up** next to Opportunity Insights.

4. On the Settings page, click **Enable**.

5. Using the Lightning App Builder, make sure that the Einstein component was added to the Home page and to Lightning pages for opportunities.

6. After insights are available, add the `Top Insight` field to opportunity list views. Salesforce automatically adds this field to default list views.

Sales Cloud Einstein users see insights on the Einstein component. It takes up to 24 hours for insights to be available.

💡 **Tip:** To get the most out of Opportunity Insights, tell sales reps to set their `Sharing Setting for All Emails and Events` to "Everyone" and add the `Top Insight` field to their opportunity list views.

SEE ALSO:

Enable Automated Activity Capture for Sales Cloud Einstein

Select Who Can Use Sales Cloud Einstein

Control How Activities Are Shared

Opportunity Insights

Enable Account Insights

Access Account Insights Settings from the Sales Cloud Einstein Setup Assistant. From the Settings page, enable and configure Account Insights.

> ✏️ **Note:** To use Account Insights, you must enable Automated Activity Capture.

1. From Setup, enter `Sales Cloud Einstein` in the `Quick Find` box, then select **Setup Assistant** under Sales Cloud Einstein.
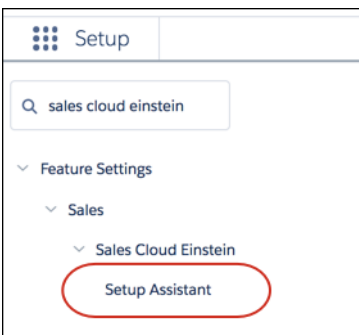
2. If it's your first time visiting the Sales Cloud Einstein Setup Assistant, click **Get Started**.
   The Sales Cloud Einstein Setup Assistant shows all the steps you need for Sales Cloud Einstein deployment, including how to select Einstein users. Only Einstein users can use Einstein features, including Account Insights.

3. Click **Set Up** next to Account Insights.

4. On the Settings page, click **Enable**.

5. Using the Lightning App Builder, make sure that the Einstein component was added to the Home page and to Lightning pages for accounts.

Sales Cloud Einstein users see insights on the Einstein component. It takes up to 24 hours for insights to be available.

SEE ALSO:

Enable Automated Activity Capture for Sales Cloud Einstein

Select Who Can Use Sales Cloud Einstein

Account Insights

Inbox

Integrate email and calendar with Salesforce with a suite of productivity features. Automated Activity Capture lets you automatically log emails and events. The Inbox clients lets you increase productivity from your inbox on every email.

> ✏️ **Note:** Some services and subscriptions include this feature for an extra cost. For pricing details, contact your Salesforce account executive.

EDITIONS

Available in: Lightning Experience

Available for an extra cost with Sales Cloud Einstein in: **Enterprise**, **Performance**, and **Unlimited** Editions

**USER PERMISSIONS**

To enable Account Insights:
- Customize Application and Modify All Data

EDITIONS

Available in various user experiences and Salesforce editions, depending on the Inbox feature. For more information, consult each feature.

IN THIS SECTION:

Automated Activity Capture for Inbox

Say goodbye to logging. Say hello to smarter selling. Connect your email and calendar to Salesforce. Then, your emails and events are automatically logged on related Salesforce records. Plus, emails sent from Salesforce go through your email account.

Inbox Clients

Boost productivity and work smarter right from your inbox. With the Inbox clients, on every email, see relevant Salesforce data, schedule meetings more quickly, and receive intelligent reminders to follow up.

Set Up Inbox

Follow the steps in the Inbox Setup Assistant, including installing the Inbox Control Panel, selecting who can use Inbox, and enabling Automated Activity Capture.

Automated Activity Capture for Inbox

Say goodbye to logging. Say hello to smarter selling. Connect your email and calendar to Salesforce. Then, your emails and events are automatically logged on related Salesforce records. Plus, emails sent from Salesforce go through your email account.

For more information on Automated Activity Capture, visit the main Automated Activity Capture article linked below.

SEE ALSO:

Automated Activity Capture

Enable Automated Activity Capture for Inbox

Inbox

EDITIONS
Available in: Lightning Experience
Available with Inbox in: **Enterprise**, **Performance**, and **Unlimited** Editions

Inbox Clients

Boost productivity and work smarter right from your inbox. With the Inbox clients, on every email, see relevant Salesforce data, schedule meetings more quickly, and receive intelligent reminders to follow up.

After Inbox is set up for your org, Inbox users can install any or all Inbox clients. During installation, users connect their email and calendar to Salesforce.

IN THIS SECTION:

List of Inbox Clients

To support common Google™ and Microsoft® email platforms for desktop and mobile devices, we offer several Inbox clients.

Install the Inbox Clients

To use the Inbox clients, you need to install the version that works with your platform and email account.

Work with Salesforce Data in Your Inbox

You don't need to leave your inbox to work with your Salesforce records.

EDITIONS
Available in: Lightning Experience and Salesforce Classic
Available for an extra cost with Inbox in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Boost Productivity on Every Email

You already use email to work smarter. Take it to the next level with the Inbox clients.

SEE ALSO:

Considerations for Setting Up Inbox

Set Up Inbox

Inbox

List of Inbox Clients

To support common Google™ and Microsoft® email platforms for desktop and mobile devices, we offer several Inbox clients.

Inbox Client	Supported Email Accounts
Gmail™ Extension for Chrome™	Gmail
Add-in for Outlook® (Works with Outlook web apps and Outlook 2013 and later)	Microsoft Office 365 Microsoft Exchange 2013 and later
Standalone Mobile Email App for iOS™ Devices	Gmail Microsoft Office 365® Microsoft Exchange 2010 and later
Standalone Mobile Email App for Android™ Devices	Gmail Microsoft Office 365 Microsoft Exchange 2010 and later

SEE ALSO:

Install the Inbox Clients

Inbox Clients

Install the Inbox Clients

To use the Inbox clients, you need to install the version that works with your platform and email account.

1. Download and install the Inbox client for your platform.

   - iOS™ app
   - Android™ app
   - Chrome™ extension
   - Add-in for Outlook®

2. When prompted during installation, log in to Salesforce.

SEE ALSO:

   List of Inbox Clients

   Inbox Clients

Work with Salesforce Data in Your Inbox

You don't need to leave your inbox to work with your Salesforce records.

IN THIS SECTION:

Access Salesforce Data from Your Inbox

Work better with Salesforce. Inbox seamlessly connects Salesforce data to your email, providing context for all your customer interactions.

Create Salesforce Data from Your Inbox

If you don't see the record you're looking for, you can create new leads, contacts, or opportunities directly. Creating data can only be done with the standalone mobile email apps and the Gmail Extension for Chrome.

See the Tasks for Every Email

Inbox intelligently surfaces relevant Salesforce tasks on every email.

Save Time and Create Salesforce Tasks From Your Email

It's such a time-saver to create Salesforce tasks without leaving your email app.

Share or Hide an Email or Event in Salesforce from Your Inbox

Share or hide the full contents of an individual email or event that's been added to related Salesforce records with Automated Activity Capture.

Keep Track of More by Manually Logging Events

From the standalone mobile email apps, you can easily create events and log them in Salesforce.

Keep Track of More by Manually Logging Emails

From the add-in for Outlook, you can easily log emails to cases, tasks, and other favorite objects in Salesforce.

Get a Quick Overview with Contact Cards

At a glance, you can see all the information about a contact. A contact card is a quick summary of contact information for email participants.

SEE ALSO:

Inbox Clients

Access Salesforce Data from Your Inbox

Work better with Salesforce. Inbox seamlessly connects Salesforce data to your email, providing context for all your customer interactions.

There's no need to open a new tab or switch between apps on your mobile device.

To view CRM records, just open an email and click the Salesforce cloud icon. If you have the Salesforce1 app installed on your mobile device, you can click an existing record to jump into the details in Salesforce!

1. Open an email.

2. Click ![icon] .
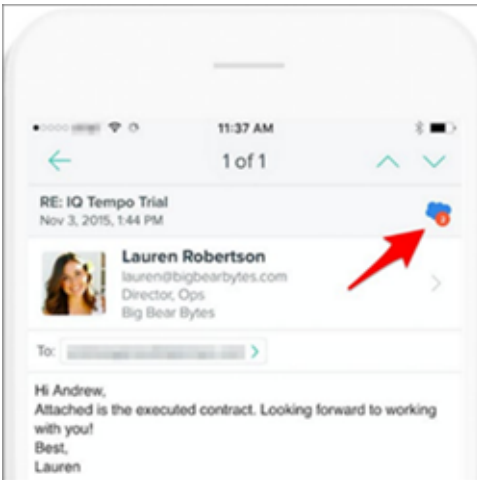
3. Click an existing record to see the details of the Salesforce record.

SEE ALSO:

Create Salesforce Data from Your Inbox

Work with Salesforce Data in Your Inbox

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available for an extra cost with Inbox in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Create Salesforce Data from Your Inbox

If you don't see the record you're looking for, you can create new leads, contacts, or opportunities directly. Creating data can only be done with the standalone mobile email apps and the Gmail Extension for Chrome.

From the Standalone Mobile Email Apps

To create a record, click [icon].

👁 **Example:** For new prospects that reach out to you, create a lead as soon as you receive their message.
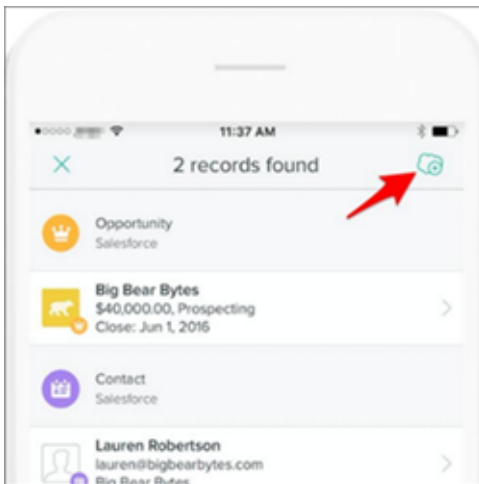
From the Gmail Extension for Chrome

1. In your Inbox, either open an email from the person for whom you want to create the record, or hover over the person's name so it appears in the Chrome extension.
2. If the Records tab isn't displayed, click the Salesforce cloud icon to open it.
3. Click **Create Record**. The button location depends on whether any records exist for the person.
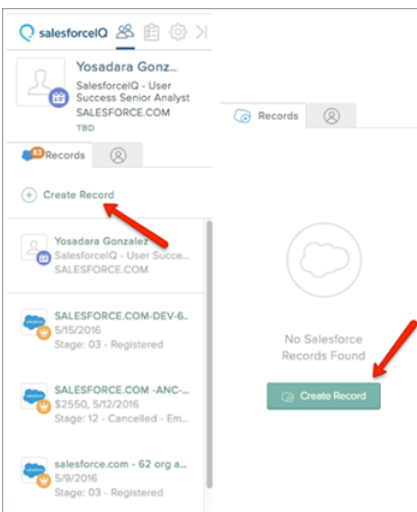
4. Select the type of record you want to create: lead, contact, or opportunity.
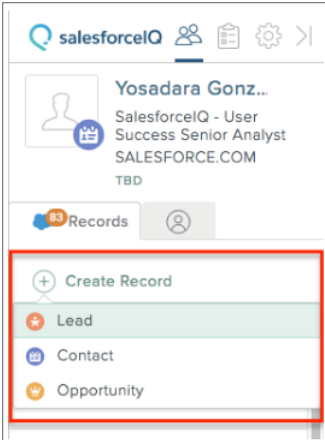
5. Fill out the appropriate information when prompted. The information you enter depends on the record type.
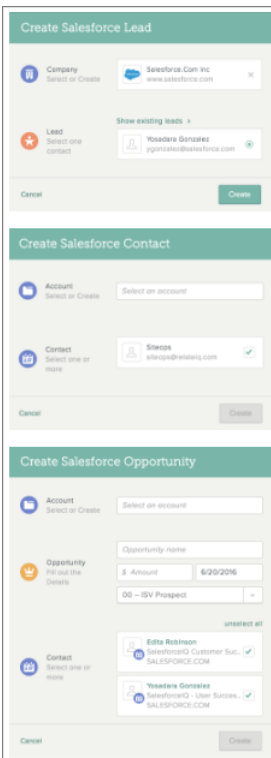
6. Click **Create**. The record you just created now appears on the records tab in the Chrome extension.

SEE ALSO:

Access Salesforce Data from Your Inbox

Work with Salesforce Data in Your Inbox

See the Tasks for Every Email

Inbox intelligently surfaces relevant Salesforce tasks on every email.

From the Standalone Mobile Email Apps

1. Open an email.

2. Click the **Task** button in the upper-right corner.

3. Scroll down to find all the tasks associated with the customers on the email thread.
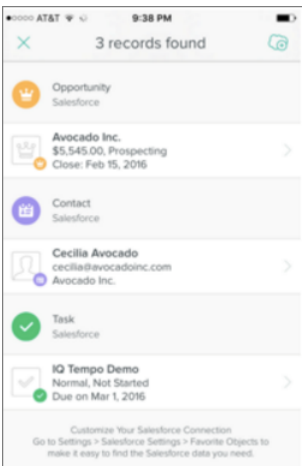
4. Click a task to see more details about the task in the Salesforce1 Mobile App and to update the task status.
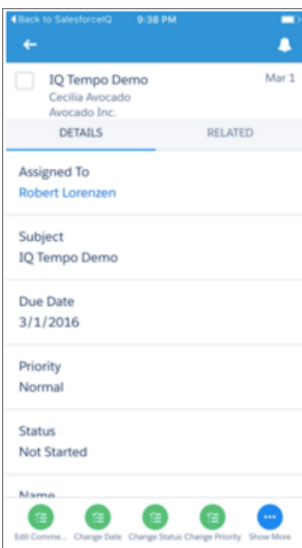
Note: If you do not see Salesforce Tasks on any of your emails, confirm that Tasks is one of your Favorite Objects. Click the **menu** icon in the upper-left corner. Click **Settings** > **Salesforce Settings** > **Favorite Objects**. Click in the upper-right corner, scroll through the list of favorite objects, and make sure Tasks is selected.

From the Gmail Extension for Chrome

Viewing Salesforce tasks associated with a particular email thread is not supported. However, you can see all your Salesforce tasks from your inbox.

1. Click the **Notebook** button in the upper-right corner.

2. Click **Salesforce Tasks** in the upper-right corner.

SEE ALSO:

Save Time and Create Salesforce Tasks From Your Email

Work with Salesforce Data in Your Inbox

Save Time and Create Salesforce Tasks From Your Email

It's such a time-saver to create Salesforce tasks without leaving your email app.

From the Standalone Mobile Email Apps

1. Open an email.

2. Click the **Tasks** icon in the upper-right corner.

3. Click the **Outline** icon in the upper-right corner.
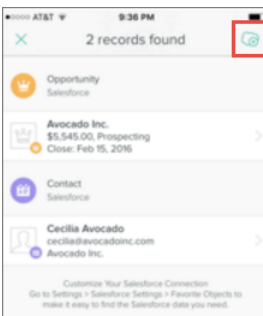
4. Under **Create a new**, click **Task**.
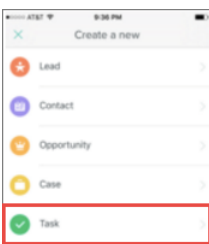
5. Fill in all the details: subject, description, associated contact, related record, and due date.
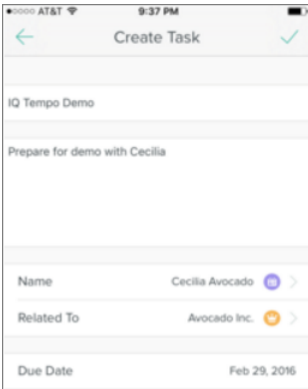
From the Gmail Extension for Chrome

Creating Salesforce tasks from an email is not supported in the Salesforce Inbox desktop app right now.

SEE ALSO:

  See the Tasks for Every Email

  Work with Salesforce Data in Your Inbox

Share or Hide an Email or Event in Salesforce from Your Inbox

Share or hide the full contents of an individual email or event that's been added to related Salesforce records with Automated Activity Capture.

> 💡 **Tip:** Using your "Sharing Setting for All Emails and Events," you can choose how to share *all of your emails and events*.

1. Open the email.

2. Click the existing sharing setting for the email or event.
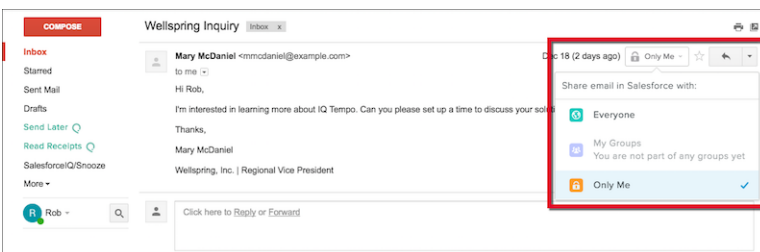
3. Select your new sharing setting.

SEE ALSO:

  Control How Activities Are Shared

  Work with Salesforce Data in Your Inbox

Keep Track of More by Manually Logging Events

From the standalone mobile email apps, you can easily create events and log them in Salesforce.

For the Standalone Mobile Email App for Android Devices

1. Open Inbox.

2. Tap the **Calendar** icon at the bottom of the screen.

3. Tap an event.

4. Tap **Log Event to Salesforce**.
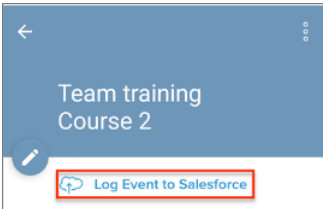
5. Enter the event details.

    *   Subject
    *   Event type
    *   People to relate the event to
    *   Records to relate the event to
    *   Invitees (Optional)
    *   Additional notes (Optional)
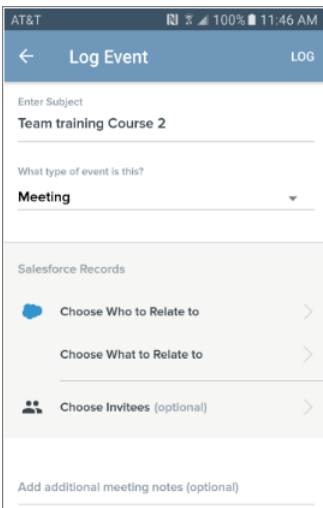
6. Tap **Log**.

For the Standalone Mobile Email App for iOS Devices

1. Open Inbox.

2. Tap the **Calendar** icon at the bottom of the screen.

3. Tap an event.

4. Tap **Log Event to Salesforce**.
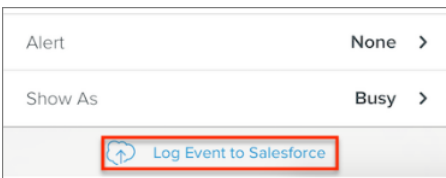
5. Enter the event details.

- Subject
- Event type
- People to relate the event to
- Records to relate the event to
- Invitees (Optional)
- Additional notes (Optional)
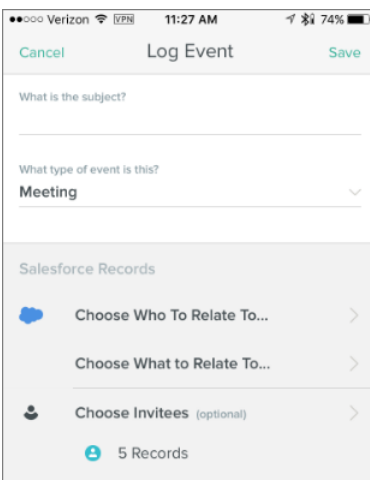
6. Tap **Log**.

SEE ALSO:

Work with Salesforce Data in Your Inbox

Keep Track of More by Manually Logging Emails

From the add-in for Outlook, you can easily log emails to cases, tasks, and other favorite objects in Salesforce.

1. Open Inbox.

2. Create a new message.

3. Enter a message recipient and body text.

   📝 **Note:** This information is required to log the message to Salesforce.

4. Click **Launch Inbox** in the top toolbar.
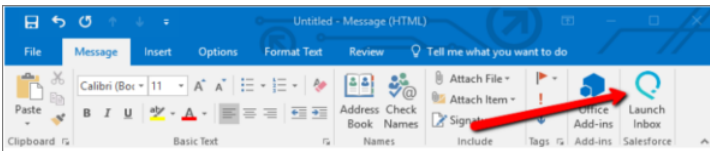
5. To the right of the compose screen, switch **Log to Salesforce** to On.
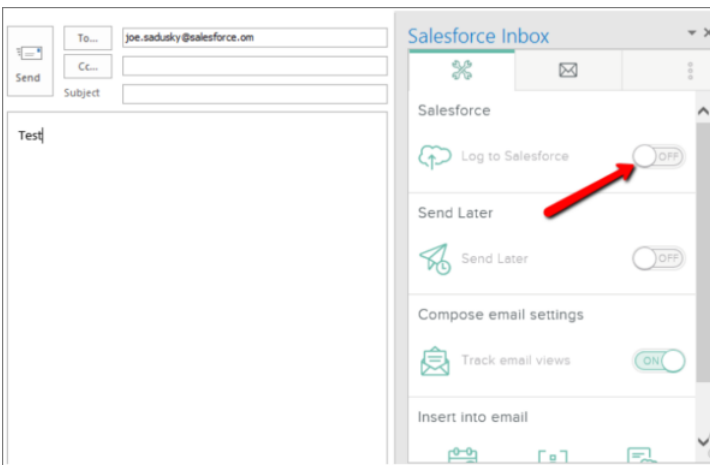
6. Check the boxes for the records (Opportunities, Contacts) to which you want to log the email.
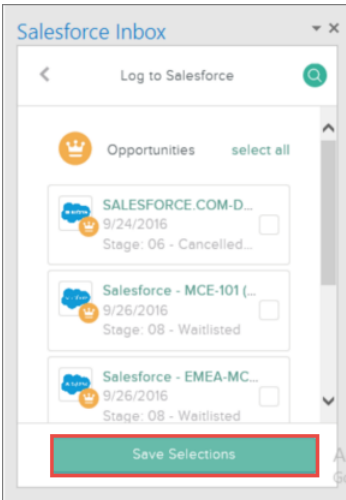
7. Click **Save Selections**.

Get a Quick Overview with Contact Cards

At a glance, you can see all the information about a contact. A contact card is a quick summary of contact information for email participants.

If a contact record doesn't exist in Salesforce, information for the Contact card doesn't generate. Instead, create a contact.

From the Add-in for Outlook

View contact cards on the **Profile** tab.

- Select **View All Contact Sources** to expand the view to see all the data sources.
- Open and view a contact's card from your Inbox or Calendar.

    1. Hover over an email address.

    This opens the sidebar, which defaults to the **Record** tab.

    2. Click to open the **Profile** tab.
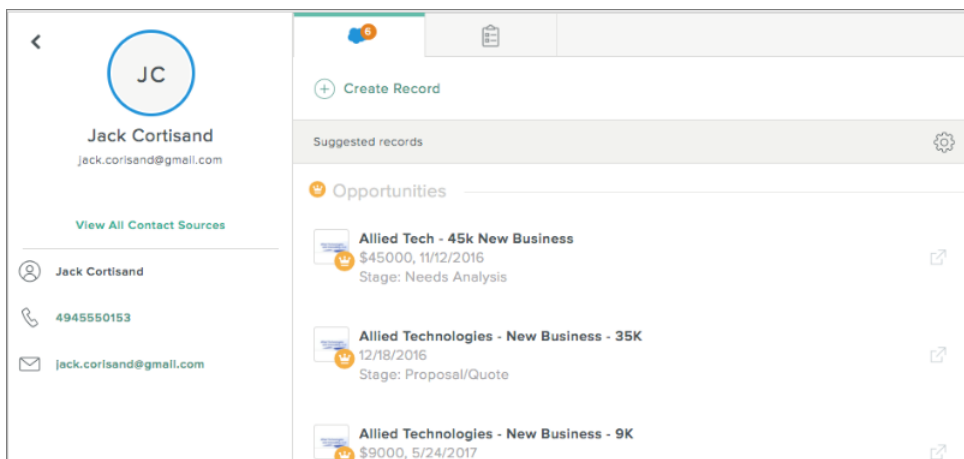
From the Standalone Mobile Email Apps

You can open and view a Contact card from any of the following places:

- Inbox—Open an email and click any of the names or addresses in the From, To, or cc lines.
- Calendar—Open an event and click any of the attendees.
- Contact Gallery—On the **Contact** tab, select any attendees that are visible in the agenda view.

    Alternatively, search for a specific contact and select the contact.

Select **Show All Contact Sources** to expand the view to see all the data sources.

In Android
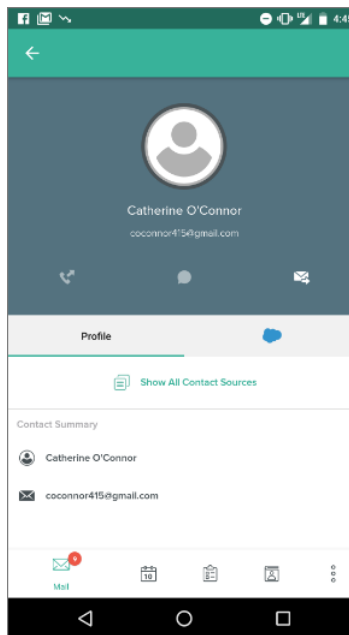
In iOS
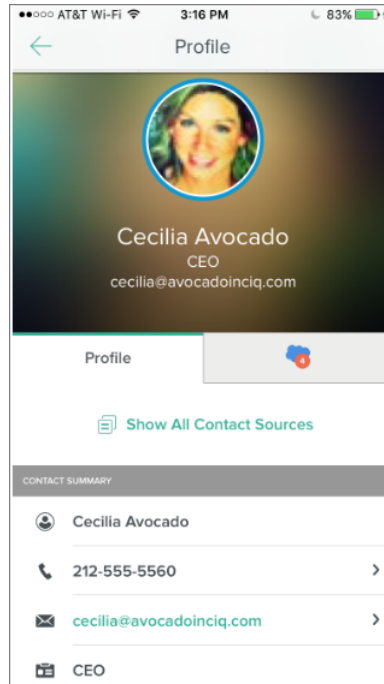
From the Gmail Extension for Chrome

View contact cards on the **Profile** tab.

You can:

- Select **View All Contact Sources** to expand the view to see all the data sources.
- Open and view a Contacts card from any of the following places:
  - Inbox or Calendar—Hover over an email address. This opens the sidebar, which defaults to the **Record** tab. Click to open the **Profile** tab.
  - Google Contacts—From the list of contacts, hover over an email address. This opens the sidebar, which defaults to the **Record** tab. Click to open the **Profile** tab.

Note: Contact card data comes from various sources.

- Images are obtained from Gravatar. To change the image, update it in Gravatar. SalesforceIQ caches data, so it could take some time before the image is refreshed.
- Structured data is obtained from Salesforce, Google or Exchange contacts, parsed signatures, or third-party data. To turn off third-party data, use the Salesforce Inbox Admin Setup screen in Lightning Experience.

SEE ALSO:

Work with Salesforce Data in Your Inbox

Boost Productivity on Every Email

You already use email to work smarter. Take it to the next level with the Inbox clients.

IN THIS SECTION:

Use Insert Availability to Optimize Scheduling

Finally got a response from that prospect you've been hunting down for weeks? Avoid the back and forth of scheduling a meeting with the Insert Availability feature.

Prioritize Your Inbox with Intelligent Notifications

Inbox analyzes your email correspondence to help you stay on top of every deal. Receive an intelligent reminder if you need to follow up on an important email, or get notified when someone opens your email.

Never Lose Touch with Smart Follow-Up Reminders

For an important email, configure a Smart Follow-Up Reminder so you can proactively reach back out to a customer who hasn't responded to your email.

Time Your Emails with Send Later

Working late at night? Use Send Later so your prospect receives your email first thing in the morning or during their lunch break.

Take a Shortcut to Typing Faster Emails

Using the Chrome extension, you can use text shortcuts in any email message you compose in Gmail. Shortcuts same time while improving accuracy, because they give you an easy way to insert text you commonly use into a message.

SEE ALSO:

Inbox Clients

Use Insert Availability to Optimize Scheduling

Finally got a response from that prospect you've been hunting down for weeks? Avoid the back and forth of scheduling a meeting with the Insert Availability feature.

1. Start an email.

2. Click **Insert Availability**.
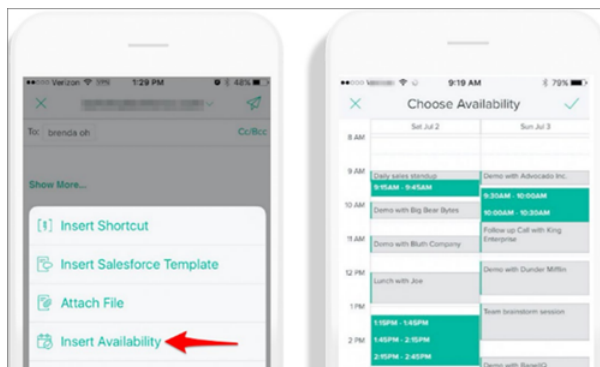
3. Select open times from your calendar.

Your prospect can click one of your options to immediately book a slot. If your calendar fills up in the meantime, your prospect only sees the times still available.

Prioritize Your Inbox with Intelligent Notifications

Inbox analyzes your email correspondence to help you stay on top of every deal. Receive an intelligent reminder if you need to follow up on an important email, or get notified when someone opens your email.

Inbox scans your unread messages and proactively suggests Salesforce tasks for engaged customers. Using natural language processing, Inbox identifies messages from customers that require a response but have not been replied to yet.

> **Note:** Inbox only suggests tasks for customer emails that you have not responded to in a couple of days. If you don't see any suggested tasks, you're up to speed on your email.

From the Standalone Mobile Email Apps

1. Open the Feed.

2. Scroll down to find a suggested task. The text snippet in the card shows the body of the email that Salesforce Inbox clued in on.
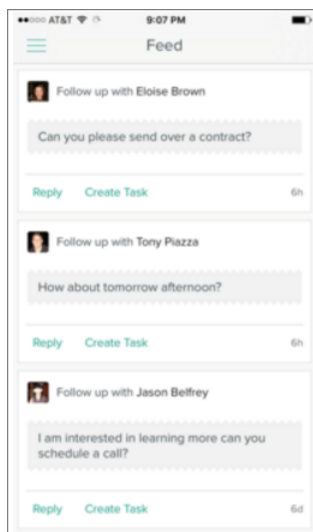
3. Do one of the following:

   - Click **Reply** to respond to the email immediately.
   - Click **Create Task** to save the suggestion as a Salesforce task.

From the Gmail Extension for Chrome

1. Click the **task list** icon in the upper-right corner.

2. Scroll down to find a suggested task. The text snippet in the card shows the body of the email that Salesforce Inbox clued in on.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available for an extra cost with Inbox in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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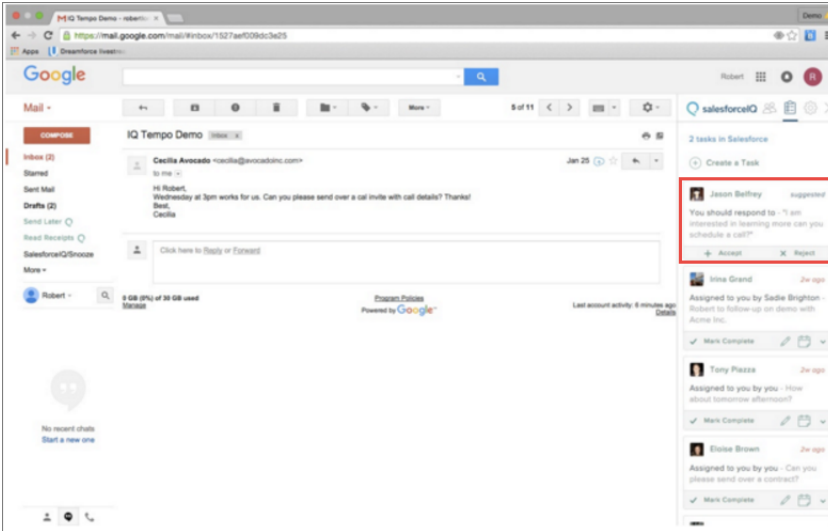
3. Do one of the following:

- Click **Accept** to save the suggestion as a Salesforce task.
- Click **Reject** to dismiss the suggestion.

SEE ALSO:

Boost Productivity on Every Email

Never Lose Touch with Smart Follow-Up Reminders

For an important email, configure a Smart Follow-Up Reminder so you can proactively reach back out to a customer who hasn't responded to your email.

From the Standalone Mobile Email Apps

1. When composing an email, click the **Email** button.
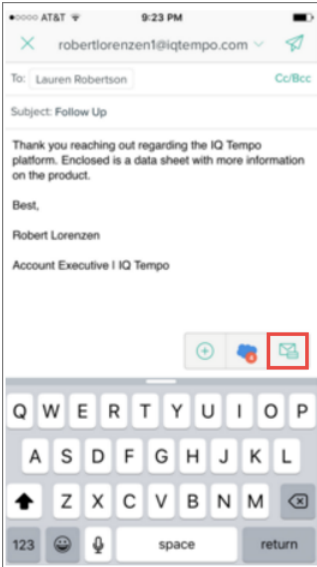
2. Click the **Remind me** toggle.
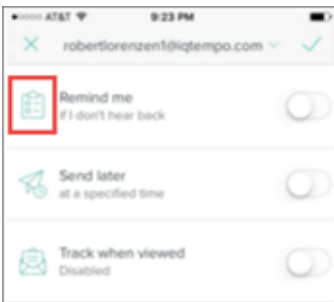
3. Select the **Smart Reminder** interval. This is the amount of time Inbox waits before creating a Salesforce task, if you don't get a reply.
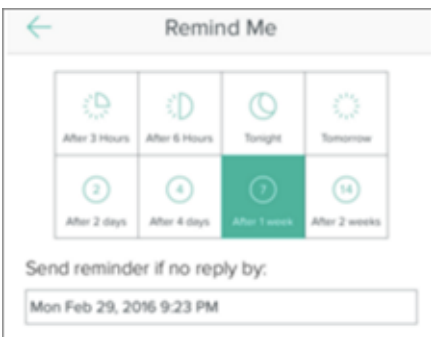
4. Send the email. Inbox automatically creates a Salesforce task if you don't hear back from the person on the email thread.

From the Gmail Extension for Chrome

1. When composing an email, click the **Email** button.

2. Set **Create a task if no reply** to On.
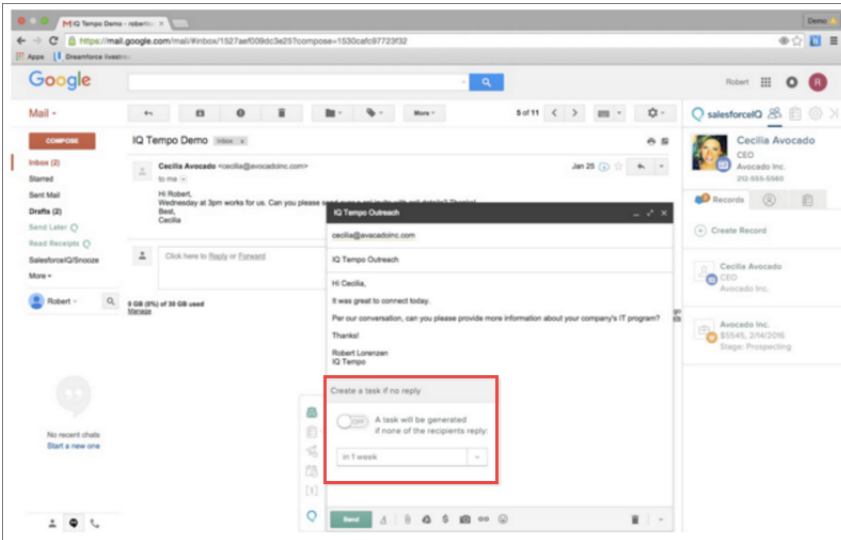
3. From the drop-down list, select the **Smart Reminder** interval. This is the amount of time Inbox waits before creating a Salesforce task, if you don't get a reply.
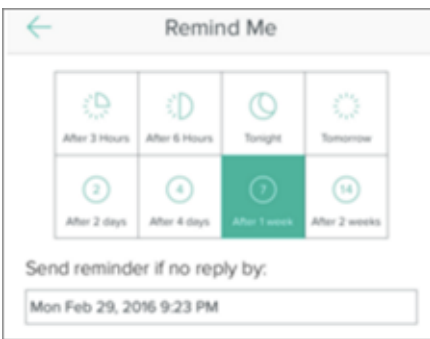
4. Send the email. Inbox automatically creates a Salesforce task if you don't hear back from the person on the email thread.

SEE ALSO:

Boost Productivity on Every Email

Time Your Emails with Send Later

Working late at night? Use Send Later so your prospect receives your email first thing in the morning or during their lunch break.
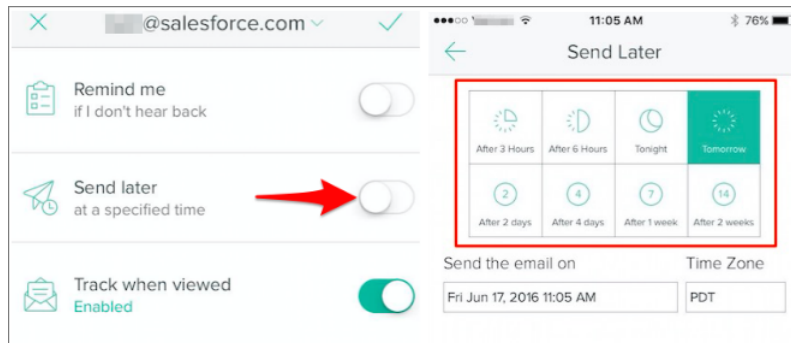
SEE ALSO:

Boost Productivity on Every Email

Take a Shortcut to Typing Faster Emails

Using the Chrome extension, you can use text shortcuts in any email message you compose in Gmail. Shortcuts same time while improving accuracy, because they give you an easy way to insert text you commonly use into a message.

A few default Shortcuts have been created for you, but you can also create your own.

👁 **Example:** If your email messages frequently include wording that you will follow up with a prospect by phone, you can use a shortcut to quickly enter that wording in any message. A sales rep might frequently end emails with the phrase "I look forward to our phone call." With a shortcut, it's easy to add the phrase every time.

1. In Gmail, click **Compose**.

2. Click the **semicolon** icon to the left of the compose screen.

3. Click **Manage your shortcuts.**

4. On the left side of the screen that appears, click **Create New** if it isn't already highlighted.

5. In the Content field, enter the text you want to appear when you enter the Shortcut. As you enter the text, the proposed Shortcut characters appear in the Shortcut field. After you save the Shortcut, you can edit these characters.

6. Click **Save**, and then click **Close**.

SEE ALSO:

Boost Productivity on Every Email

Set Up Inbox

Follow the steps in the Inbox Setup Assistant, including installing the Inbox Control Panel, selecting who can use Inbox, and enabling Automated Activity Capture.

🛑 **Important:** After setting up Inbox, tell Inbox users to install the Inbox clients.

IN THIS SECTION:

1. Considerations for Setting Up Inbox

   Before setting up Inbox, review how it affects the Assistant, triggers, and validation rules.

2. Install the Inbox Control Panel

   Manage your sales team's deployment of Inbox clients with the Inbox Control Panel from the AppExchange.

3. Select Who Can Use Inbox

   Create a permission set with the Inbox permission set license, enable app permissions for Inbox features, and assign the permission set to users.

4. Enable Automated Activity Capture for Inbox

   Use the Inbox Setup Assistant as your guide for setting up Automated Activity Capture.

SEE ALSO:

   List of Inbox Clients

   Install the Inbox Clients

   Inbox

Considerations for Setting Up Inbox

Before setting up Inbox, review how it affects the Assistant, triggers, and validation rules.

- When creating Salesforce records with the Inbox clients, the validation rules, triggers, and required fields from Salesforce are applied.

- It can take up to 24 hours for changes in Salesforce to show up in the Inbox clients.

- If you enable Automated Activity Capture, the Assistant may not work as expected. Alerts in the Assistant don't reflect emails and events that were added to Salesforce with Automated Activity Capture. Also, emails that your users send from the Assistant don't go through their Automated Activity Capture email account.

SEE ALSO:

   Set Up Inbox

EDITIONS

Available in various user experiences and Salesforce editions, depending on the Inbox feature. For more information, consult each feature.

Install the Inbox Control Panel

Manage your sales team's deployment of Inbox clients with the Inbox Control Panel from the AppExchange.

1. From Setup, enter `Inbox` in the `Quick Find` box, then select **Setup Assistant** under Inbox.

2. If it's your first time visiting the Inbox Setup Assistant, click **Get Started**.
   The Inbox Setup Assistant shows all the steps you need for Inbox deployment.

3. To install the Inbox Control Panel, click **Get Package**. (Alternatively, you can directly install the Inbox Control Panel from the AppExchange.)

4. During installation, select **Install for All Users**.

EDITIONS

Available in various user experiences and Salesforce editions, depending on the Inbox feature. For more information, consult each feature.

USER PERMISSIONS

To install the Inbox Control Panel:
- "Customize Application" and "Modify All Data"

Select Who Can Use Inbox

Create a permission set with the Inbox permission set license, enable app permissions for Inbox features, and assign the permission set to users.

1. Create a permission set.

2. From the License dropdown list, select **Inbox**.

3. Click **Save**.

4. Click **App Permissions**.

5. Click **Edit** and enable app permissions for Use Automated Activity Capture and Use Inbox.

6. Click **Save**.

7. Assign the permission set to users.

Enable Automated Activity Capture for Inbox

Use the Inbox Setup Assistant as your guide for setting up Automated Activity Capture.

1. From Setup, enter `Inbox` in the `Quick Find` box, then select **Setup Assistant** under Inbox.

2. If it's your first time visiting the Inbox Setup Assistant, click **Get Started**.
The Inbox Setup Assistant shows all the steps you need for Inbox deployment, including how to select Inbox users. Only Inbox users can use Inbox features, including Automated Activity Capture.

3. Click **Set Up** next to Automated Activity Capture.

4. On the Settings page, click **Enable**.

5. Configure additional Automated Activity Capture settings.

After you enable Automated Activity Capture, Salesforce asks assigned Inbox users to connect their Google™ or Microsoft® Office 365® account to Salesforce. It takes up to 24 hours for their emails and events to be initially added to Salesforce.

Remove the `Last Activity Date` field from page layouts for accounts, contacts, leads, opportunities, and person accounts. This field doesn't reflect emails and events added to Salesforce with Automated Activity Capture.

Set Up and Maintain Sales Features

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

Core Sales Features

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

Accounts, Contacts, and Leads

- Enable news, logos, and account autofill (Lightning Experience only)
- Set Up Contacts to Multiple Accounts
- Enable Person Accounts
- Enable Social Accounts, Contacts, and Leads

Leads and Campaigns

- Define Default Settings for Lead Creation
- Set Up Lead Assignment Rules
- Set Up Auto-Response Rules
- Set Up Campaign Influence

Quotes and Orders

- Enable Quotes
- Set Up Orders

Products and Price Books

- Enable Product Schedules
- Set Up Automatic Price Activation

Forecasts

- Set Up Collaborative Forecasting

Territory Management 2.0

- Implement and Manage Your Organization's Sales Territories

Duplicate Management

- Set Up Duplicate Management in Salesforce

Data.com

- Implement Data.com Clean
- Implement Data.com Prospector

Work.com

- Enable Work.com Features
- Set Up Performance Summaries
- Set Up Performance Ratings
- Customize the Skill and Endorsement Feature

Sales Rep Productivity Features

Sales rep productivity features enhance core features by letting sales reps schedule events, communicate via email, and more.

Notes

- Set Up Notes

Activities

- Set Up Events, Calendars, and Tasks
- Set Up Shared Calendars in Salesforce Classic

Salesforce Email

- Set Up and Manage Email Templates

Microsoft Email Integration

Experience Salesforce directly in Microsoft email applications, relate important emails to Salesforce records, and sync data between the two systems.

- Lightning for Outlook
- Lightning Sync
- Salesforce for Outlook

Administering People and Organizations That Users Sell To

Administering Accounts

Enable Person Accounts

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

Before you begin, make sure to:

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

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

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

2. Assign person account record types to profiles that require person accounts.

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

SEE ALSO:

Person Accounts Implementation Guide

Account Settings

Enhance account records with company hierarchy information, news, logos, autofill, and more.

To find all these settings, from Setup, go to the Accounts Settings page.

Setting	Description
Show Link to Hierarchy	Provide a link to the account hierarchy on account details. Let sales reps view relationships among parent and child accounts.
	Account hierarchies are available in Lightning Experience and Salesforce Classic. In Lightning Experience, add the View Account Hierarchy action to the account page layout. In Salesforce Classic, account detail pages include a **View Hierarchy** link whenever an account is related to a parent or child account via the `Parent Account` field.
Customize Hierarchy Columns	Customize the columns in account hierarchies to show the information that's most useful to your sales teams. Available in Lightning Experience only.

Setting	Description
Enable News	Provide sales reps with a customized list of timely, relevant news from US sources. News appears on accounts, contacts, leads, opportunities, and the Home page in Lightning Experience and Salesforce1. Confirm that the News component appears on your page layouts.
Enable Automated Account Fields	Display US-based companies in the `Account Name` field as sales reps enter information. Reps can select a suggested company from the list, making it easier to create business accounts. Automated Account Fields is available in Lightning Experience.
Enable Account Logos	Display company logos, when available, on US-based accounts. Some new logos replace logos from social profiles. Logos also appear with account suggestions. Account Logos is available in Lightning Experience and Salesforce1.
Contacts to Multiple Accounts	Let users relate a contact to multiple accounts. After enabling this feature, complete the additional setup steps. Contacts to Multiple Accounts is available in Lightning Experience, Salesforce Classic, and Salesforce1

SEE ALSO:

    Set Up Account Hierarchy in Lightning Experience

Set Up Account Hierarchy in Lightning Experience

Account hierarchy gives your sales team a bird's-eye view of the relationships between parent and subsidiary accounts. You can customize hierarchy columns to show the information that's most useful to your sales teams.

1. In Setup, add the View Account Hierarchy action to the Salesforce1 and Lightning Experience Actions section of your account page layout.

   The Actions dropdown menu includes the View Account Hierarchy action, unless you customized the account page layout before Spring '17.
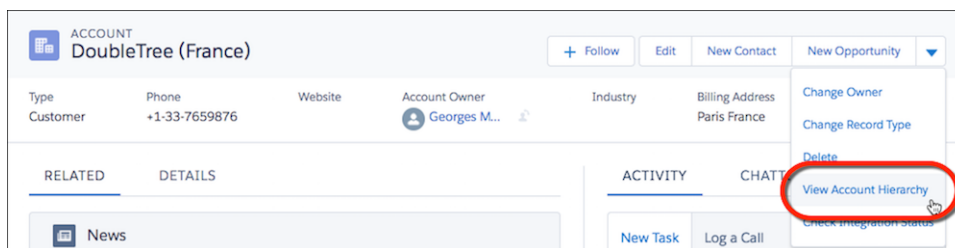
You can expand or collapse parts of a hierarchy as you navigate it. You can view up to 2,000 accounts from each point where you enter a hierarchy. To view accounts in a different part of the hierarchy, enter the hierarchy from a different account.

2. If you want, edit the columns in account hierarchies.

   a. In Setup, in the `Quick Find` box, enter `Object Manager` and then click **Object Manager**.

   b. In Account, click **Hierarchy Columns** and then edit the columns.

   By default, account hierarchies display the same columns as the Recently Viewed Accounts standard list view. However, customizing the hierarchy columns doesn't change the list view columns.

> **Note:** After you customize hierarchy columns, the item Org_Account_Hierarchy is added to the Accounts list view menu. Deleting this item resets the columns to the defaults.

SEE ALSO:

Account Settings

Managing Account Teams

Your users can add account team members to accounts. Similar to opportunity teams on opportunities, account teams are teams of users who work together on accounts by defining each user's role and granting specialized levels of access to the account and its related records.

IN THIS SECTION:

Enable Account Teams

To make it easy for your sales reps to collaborate on accounts, enable account teams in Salesforce.

Customize Account Team Roles

Every account team member has a role in working with that account, such as Account Manager or Sales Rep. To track the roles that team members play in your company, customize your account team roles in Salesforce.

Considerations for Disabling Account Teams

Before you disable account teams, review these key considerations.

SEE ALSO:

Enable Account Teams

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable account teams:
- "Customize Application"

To set up team roles:
- "Customize Application"

Enable Account Teams

To make it easy for your sales reps to collaborate on accounts, enable account teams in Salesforce.

1. From Setup, enter `Account Teams` in the `Quick Find` box, then select **Account Team Settings**.
2. Define the settings as needed.
3. Save your changes.

SEE ALSO:

Managing Account Teams

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable account teams:
- "Customize Application"

To set up team roles:
- "Customize Application"

Customize Account Team Roles

Every account team member has a role in working with that account, such as Account Manager or Sales Rep. To track the roles that team members play in your company, customize your account team roles in Salesforce.

⚠️ **Warning:**

- Account teams share roles with opportunity teams. If you remove an account team role, that role is no longer listed as an opportunity team role.

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

2. Edit the picklist values for team roles as needed.

3. Save your changes.

4. To update a changed picklist value in all your files, enter `Replace Team Roles` in the `Quick Find` box, then select **Replace Team Role**.

SEE ALSO:

Managing Account Teams

Considerations for Disabling Account Teams

Before you disable account teams, review these key considerations.

- Disabling account teams irreversibly removes existing teams from all accounts and delete users' default account teams, and removes the Account Team related list from all page layouts.

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

SEE ALSO:

Managing Account Teams

Administering Relationship Groups

Install and Implement Relationship Groups

Obtaining the Relationship Groups Custom App

The relationship groups custom app comes preinstalled in most Salesforce for Wealth Management organizations. If your Salesforce for Wealth Management organization does not have the relationship groups custom app, contact Salesforce to request it.

Verifying the Installation of the Relationship Groups Custom App

If the relationship groups custom app has been installed in your organization, the Relationship Groups option displays in the Force.com app menu.

In addition, administrators can use the following procedure to verify that the relationship groups custom app was successfully installed:

1. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps** and verify that the relationship groups custom app is present and has the ⬇ Managed - Installed icon.
2. From your management settings for custom objects, verify that the relationship group and relationship group member objects are present and that each has the ⬇ Managed - Installed icon.

Configuring the Relationship Groups Custom App

Perform the following implementation tasks to configure the custom app. If the relationship groups custom app came pre-installed with Salesforce for Wealth Management, some of these configurations may already be set in your organization.

Customizing Account Page Layouts

From the object management settings for accounts, go to Page Layouts, then remove the following related lists from the appropriate account page layouts.

- Relationship Groups (Primary Account)
- Relationship Groups (Secondary Account)

Customizing Person Account Page Layouts

From the object management settings for person accounts, go to Page Layouts, then edit the appropriate person account page layouts.

1. In the Related List Section, drag and drop to edit the following related lists:

   - Add **Relationship Group Members**
   - Remove **Relationship Groups (Primary Account)**
   - Remove **Relationship Groups (Secondary Account)**

2. Edit the Relationship Group Members related list as follows:

   - At minimum, include the following fields: `Relationship Group Member: Role`, `Relationship Group Member: Priority`, `Relationship Group Member: Include in Roll-Up`
   - Remove the standard **New** button
   - Add the custom **New** button

Setting Context-Sensitive Help for Relationship Groups

By default, the **Help for this Page** links on relationship group pages open help content about custom objects in general. To redirect those links to help topics that specifically describe relationship groups:

1. Go to the management settings for custom objects.

2. Click **Relationship Group** to open its custom object definition.

3. In the Custom Object Definition Detail section, click **Edit**.

4. For `Context-Sensitive Help Setting`, choose `Open a window using a custom s-control`.

5. For `Custom S-Control`, choose `Relationship Groups Help`.

6. Click **Save**.

> 📝 Note: Repeat this procedure for the Relationship Group Member custom object. This sets an appropriate context-sensitive destination for the help links on the Relationship Group Member related lists.

Overriding Standard Relationship Group Buttons

To customize the buttons on the relationship group detail page:

1. Go to the management settings for custom objects.

2. Click **Relationship Group** to open its custom object definition.

3. In the Buttons, Links, and Actions section, click **Edit** next to **New** and replace that button with the `NewHousehold` s-control.

Customizing Relationship Group Search Layouts

To customize the search layouts for relationship groups:

1. Go to the management settings for custom objects.

2. Click **Relationship Group** to open its custom object definition.

3. In the Search layouts section, click **Edit** to modify the appropriate search layout. At minimum, we recommend setting the following columns for search results:

   - Relationship Group Name
   - Primary Account
   - Secondary Account
   - Last Modified By

Customizing Relationship Group Page Layouts

To customize the layout of the relationship group detail page, from the object management settings for relationship groups, go to Page Layouts, then click **Edit** next to the appropriate page layout name. Edit the page layout as follows:

1. Remove the **Clone** button from the detail page.

2. Edit the Open Activities related list as follows:

   - Remove the standard **New Task** and **New Event** buttons
   - Add the custom **New Task** and **New Event** buttons

3. Edit the Activity History related list as follows:

   - Remove the standard **Log a Call**. **Mail Merge**. **Send an Email**, **Request Update**. and **View All** buttons
   - Add the custom **Log a Call**, **Mail Merge**, and **Send an Email** buttons

4. In the Relationship Group Members related list, include the following fields, at minimum:

   - `Relationship Group`

- `Role`
- `Priority`
- `Include in Roll-Up`

Overriding Standard Relationship Group Member Buttons

To customize the buttons on the relationship group member detail page:

1. Go to the management settings for custom objects.

2. Click **Relationship Group Member** to open its custom object definition.

3. In the Buttons, Links, and Actions section, click **Edit** next to **New** and replace that button with the `Edit Household Members` s-control.

After configuring the relationship groups custom app, verify that a Relationship Groups option displays in the Force.com app menu.

📝 Note:

- In some cases, the custom app and its custom objects may have the label "Households" instead of "Relationship Groups" throughout. Whatever the labels are, they cannot be changed because the app is a managed package.

- Installing the Relationship Groups custom app may cause an error if your organization has fewer than 21 account records. You may ignore this error and continue the installation process.

- For all installations, the API names of the custom objects begin with the namespace prefix `household__`.

- The Relationship Group Member object is only supported in API version 11.0 and later.

Testing the Relationship Groups Package

The relationship groups managed package provides unit tests that run when you install the package in your sandbox or production organization. In some cases, a component like an Apex trigger, validation rule, workflow rule, or custom field prevents the unit tests from completing successfully.

If the unit tests fail, do the following before running the tests again:

- Install the latest version of the relationship groups managed package. The functionality of the new version is the same as the older version except the unit tests have been enhanced. Contact Salesforce and request the latest version of the package (not available on the AppExchange).

- Deactivate components that prevent account, household, or household member objects from being edited or deleted. Apex triggers are a common cause of failed unit tests.

  To ensure the relationship groups package runs successfully in your organization, the unit tests attempt to edit and delete some account, household, and household member objects. These tests do not permanently modify your organization's data. If a platform element prevents these objects from being edited or deleted, the unit tests fail.

EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

USER PERMISSIONS

To install apps:
- "Download AppExchange Packages"

To configure and deploy installed apps:
- "Customize Application"

Configuring Contacts and Contact Roles

Creating Contact Sharing Rules

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

1. If you plan to include public groups in your sharing rule, confirm that the appropriate groups have been created.

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

3. In the Contact Sharing Rules related list, click **New**.

4. Enter the **Label Name** and **Rule Name**. The Label is the sharing rule label as it appears on the user interface. The Rule Name is a unique name used by the API and managed packages.

5. Enter the **Description**. This field describes the sharing rule. It is optional and can contain up to 1000 characters.

6. Select a rule type.

7. Depending on the rule type you selected, do the following:

    - `Based on record owner`—In the `owned by members of` line, specify the users whose records will be shared: select a category from the first drop-down list and a set of users from the second drop-down list (or lookup field, if your organization has over 200 queues, groups, roles, or territories).

    - `Based on criteria`—Specify the Field, Operator, and Value criteria that records must match to be included in the sharing rule. The fields available depend on the object selected, and the value is always a literal number or string. Click **Add Filter Logic...** to change the default AND relationship between each filter.

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

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

9. Select the sharing access setting for users.

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

10. Click **Save**.

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.

If you disable Contacts to Multiple Accounts, keep in mind that doing so deletes all indirect account-contact relationships. Associations between a contact and its primary account remain.

▶ Watch a Demo (3:58 minutes)

1. If you're already using Account Contact Roles or a custom-built solution with a junction object, review how those solutions compare with Contacts to Multiple Accounts.

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

3. Select **Allow users to relate a contact to multiple accounts**.

4. If you want to use custom fields to capture unique information about relationships—for example, the best time to call a contact—now's a good time to set that up. From the object management settings for Account Contact Relationship:

   - In Lightning Experience, go to **Fields & Relationships**.
   - In Salesforce Classic, go to **Fields**.

5. Make sure that you have the most relevant fields on your Account Contact Relationship page layout. From the object management settings for Account Contact Relationship, go to **Page Layouts**.

6. Add the Related Contacts related list to the account page layouts your reps use.

   Because the Related Contacts related list automatically includes all direct contacts, you can remove the Contacts related list on your account page layouts.

   💡 **Tip:** Easily see who's a direct contact for the account when you add the Direct field to the Related Contacts related list.

7. Add the Related Accounts related list to the contact page layouts your reps use.

   💡 **Tip:** Easily see which account is the contact's primary account when you add the Direct field to the Related Accounts related list.

8. If you use person accounts, from Salesforce Classic, add the Related Accounts and Related Contacts related lists to the person account page layouts your reps use.

9. Decide whether you want to prevent activities from automatically rolling up to a contact's primary account. If so, from Setup, go to the Activities Settings page and deselect **Roll up activities to a contact's primary account**.

10. If you want to look at the relationships between contacts and accounts, create custom report types.

SEE ALSO:

Create Custom Report Types for Account Contact Relationships

Validation Rules for Account Contact Relationships

Validation Rules for Account Contact Relationships

If your org uses Contacts to Multiple Accounts and you've created validation rules for the Account Contact Relationship object, you must bypass those validation rules in some cases.

When a contact with a related account is created, a direct Account Contact Relationship record is also created. Similarly, when a contact gets a new primary account, the current direct Account Contact Relationship record is modified. Validation rules for the Account Contact Relationship are run immediately after the contact is saved to the database.

Because the Account Contact Relationship records are created behind the scenes and users can't access the Account Contact Relationship fields when creating or editing a contact, validation rules can block the contact from being saved.

For example, the following Account Contact Relationship validation rule requires a value for the Roles field.

```
ISNULL(Roles)
```

However, a user can't access the Roles field on the Account Contact Relationship object when creating or editing the contact. Therefore, the criteria in the validation rule can't be met, and the contact can't be saved.

To bypass the validation rule when a direct Account Contact Relationship is created, add the following syntax to your Account Contact Relationship validation rule.

```
(NOT (ISNEW() && IsDirect)) && (NOT ISCHANGED(IsDirect))
```

Now, the Account Contact Relationship validation rule states that the Roles field is required only if the Account Contact Relationship isn't a direct relationship.

```
(NOT (ISNEW() && IsDirect)) && (NOT ISCHANGED(IsDirect))
&&
ISNULL(Roles)
```

SEE ALSO:

Set Up Contacts to Multiple Accounts

Comparing Contacts to Multiple Accounts to Other Options

Allowing your users to relate a contact to multiple accounts makes it easier for them to track the relationships between the people and businesses they work with. However, if you're already using Account Contact Roles or a custom-built solution with a junction object, here's a summary of how those solutions compare with Contacts to Multiple Accounts.

Feature or Functionality	Contacts to Multiple Accounts	Account Contact Roles	Custom Junction Object
Standard objects	✔	✔	
Custom fields	✔		✔
Custom layouts	✔		✔
Record types			✔
Field history			✔

Feature or Functionality	Contacts to Multiple Accounts	Account Contact Roles	Custom Junction Object
Validation rules	✔		✔
Workflow	✔		✔
Process builder	✔		✔
Flow	✔		✔
Triggers	✔		✔
Custom actions	✔		✔
API accessible	✔	✔	✔
Single related list	✔		
Multiple relationship rows in database		✔	✔
Applies to storage limits			✔
Sharing and object permissions	Derived from Account and Contact	Derived from Account	Configured independently
Reporting	Custom report types	Standard report types Custom report types	Custom report types
User interface	Salesforce Classic Lightning Experience Salesforce1	Salesforce Classic Salesforce1 (However, records in the Contact Roles related list are read only, and the Role field isn't available.)	Salesforce Classic Lightning Experience Salesforce1

SEE ALSO:

Set Up Contacts to Multiple Accounts

Create Custom Report Types for Account Contact Relationships

If you've enabled Contacts to Multiple Accounts, run reports that show the relationships between contacts and accounts. First, set up custom report types so that sales managers and other teammates can create the reports they need.

1. Make sure you're familiar with custom report types and the general steps for creating and maintaining them.

2. Create custom report types with the appropriate object relationships, and configure them as necessary.

   Check out these examples of custom report types to get you started.

Report type	Lets teammates run reports that show	A (Primary Object)	B	C	Make sure you also
Related Contacts	All the contacts, both direct and indirect, that are related to accounts.	Accounts	Contact Relationships		Add the `Direct` and `Full Name` fields to the Contact Relationships page layout.
Related Accounts	All the accounts, both direct and indirect, that are related to contacts.	Contacts	Account Relationships		
Related Contacts with or without Activities	All the contacts, both direct and indirect, that are related to accounts, and whether there's recent activity.	Accounts	Contact Relationships	Activities	

3. Deploy the report types you want to make available.

4. Let your sales teams know that they can create reports using these custom report types.

SEE ALSO:

Enable Social Accounts, Contacts, and Leads

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

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

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

1. From Setup, enter `Social Accounts` in the `Quick Find` box, then select **Social Accounts and Contacts Settings**.

2. Select **Enable Social Accounts and Contacts**.

3. Select the social networks that users in your organization can access. By default, all social networks are selected.

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

4. Click **Save**.

5. To make Twitter accessible in the Salesforce1 mobile app, add the Twitter card to the Mobile Cards section of the accounts, contacts, and leads page layouts.

6. Let your users know that they can configure Social Accounts, Contacts, and Leads for their individual use.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

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

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

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USER PERMISSIONS

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

Considerations for Enabling and Managing the Customer Portal for Contacts

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

Enabling the Customer Portal for Contacts

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

EDITIONS

Available in: Salesforce Classic

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

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

- Any data that's created or owned by a Self-Service user can be visible to a partner user or customer user who's associated with the same contact.

- The user's `Nickname` defaults to the user's email alias unless you specify otherwise. For example, if the user's `Email` is "jsmith@company.com," the user's `Nickname` defaults to "jsmith" when you click **Save**.

- The first time you enable a contact for the customer portal on an account, the contact is assigned to the customer user role, which includes the name of the contact's account. You can update the contact's portal role later. (This behavior doesn't apply to high-volume customer users, because they don't have roles and aren't included in the role hierarchy.)

Managing the Customer Portal for Contacts

- Edit an enabled contact's access to your customer portal. Click **Manage External User**, and then choose **View Customer User**.

- Merge contacts that are enabled to use a customer portal.

- Change the account on the contact.

- Make sure that you keep your contacts' access to your customer portal up-to-date by deactivating and disabling access as needed.

- You can delete contacts only if they're disabled from the portal. Inactive portal users can't be deleted.

Enable the Customer Portal for Contacts and Person Accounts

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

1. From a contact or person account detail page, click **Manage External User**, and then select **Enable Customer User**.

2. Verify the general information and locale settings, and enter any missing information. The customer's `Username` defaults to the customer's `Email`.

3. Select a portal user license. The user license that you choose determines the permission sets, user profile, and role hierarchy options that you can select for the customer user. See Customer Portal User Licenses.

4. Select `Generate new password and notify user immediately` to email a customer portal username and password to the customer.

   If your Salesforce org uses multiple customer portals, customer users can access all customer portals that are assigned to their profiles with a single username and password. See Creating Multiple Customer Portals.

5. Click **Save**.

6. To troubleshoot or confirm the portal configuration, on the contact detail page, click **Manage External User**, and then choose **Log in to Portal as User**. A new browser window opens and logs you in to the portal as the partner user.

You can deactivate customer users as needed.

SEE ALSO:

Enable Social Accounts, Contacts, and Leads

Enable Self-Service for Contacts and Person Accounts

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

> ![note icon] **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.

1. From the contact or person account detail page, click **Enable Self-Service**.

2. Verify the general information and locale settings, and enter any missing information. The customer's Self-Service `Username` defaults to the customer's `Email`.

3. To enable the customer as a Self-Service super user, select the `Super User` checkbox. Super users can view case information, add comments, and upload attachments for all cases that anyone in their company submits.

4. Select `Generate new password and notify user immediately` to email a Self-Service username and password to the customer.

5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

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

Set Up Contact Roles

Contact roles specify the part that each contact plays in an account, case, contract, or opportunity. When you use contact roles, your sales team always knows who to contact and when. Set up contact roles for each available object you want to use them with. You can define which roles to use and how they appear to your sales reps.

> ![important icon] **Important:** In Salesforce Classic, contact roles are available for accounts, opportunities, cases, and contracts. In Lightning Experience, contact roles are available for opportunities and contracts. Although contact roles work more or less the same for each available object, they work independently. Therefore, you need to set them up and use them separately for each object.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

1. From Setup, enter `Contact Roles` in the `Quick Find` box, then select the contact roles you want to set up.

2. Modify the picklist values as needed. You can even create new values and add color to the values whenever they appear in charts.

3. Save your changes.

4. Add the Contact Roles related list to the appropriate page layout.
   For example, if you're creating contact roles for opportunities, add the Contact Roles related list to the opportunity page layouts that your sales reps use.

Allow Users to Create Private Contacts

Private contacts are contacts that aren't associated with an account. To give your users the ability to create private contacts, adjust your contact page layouts so the `Account Name` field isn't required.

Contacts that aren't associated with an account are always private, regardless of your organization's sharing model. Before allowing private contacts, consider the downside: they're easy to forget because they're hidden from all users except their owner and the system administrator.

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

2. Select the layout you want to edit.

3. Find the `Account Name` field on the layout and hover over it. Then, click the wrench icon to show the field properties.

4. Deselect the `Required` checkbox.

5. Confirm your changes.

Improve Your Organization's Data Quality

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

IN THIS SECTION:

Set Up Data.com Prospector

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

Set Up Data Integration

Set up Data Integration to continually update your org with the latest data.

Set Up Data.com Clean

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

Get an Assessment of Your Account Data

Start making informed decisions about the quality of your account data—request a Data.com data assessment. The assessment summarizes overall data quality for your accounts and provides an analysis of key account fields. It doesn't change data in your org. Data assessments are available for orgs in the United States and Canada. For current Data.com Clean customers, we recommend using the AppExchange package Data.com Clean Reports instead.

Set Up Data.com Prospector

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

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

IN THIS SECTION:

1. Enable Data.com Clean for Data.com Prospector

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

2. Configure Data.com Prospector

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

3. Configure Data.com Prospector

   With Data.com Prospector, you get Dunn & Bradstreet fields for accounts and leads you add to Salesforce from Data.com.

4. Manage Access to Data.com Search Results and Related Features

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

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

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

6. Enable or Disable Data.com API Functionality

   Data.com API functionality is enabled by default.

SEE ALSO:

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

Set Up Data.com Users

Give users access to Data.com and set their record addition limits so they can start taking advantage of Data.com's rich database of accounts, contacts, and leads. The number of Data.com users you can set up—within Salesforce or via the Data Loader—depends on the number of Data.com licenses you purchased.

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

Walk Through It: Set Up Data.com Users

1. From Setup, enter `Manage Users` in the `Quick Find` box, then select **Users**.
2. Click **Edit** for a user.
3. Select a `Data.com User Type`. (You can review the types of Data.com users on page 71.)
4. Select the `Data.com Monthly Addition Limit` for the user.
5. Save the user.

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

SEE ALSO:

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

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

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

IN THIS SECTION:

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

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

How Do Licenses Work for Data.com Prospector?

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

How Do Licenses Work for Data.com Clean?

If your org uses Data.com Prospector, users with those licenses can manually update the account, contact, and lead records they have access to. With a Data.com Clean license, you can use Data.com Clean jobs to update records. You can also use Data Integration to update records as they are added or saved. Users who have a Data.com Clean license can manually update records, even if they don't have a Data.com Prospector license.

SEE ALSO:

Set Up Data.com Users

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

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

⛔ **Important:** The Data.com API Limits section has information on calls to the Data.com Match API and calls to the Data.com Search API. You can only see the information on Match calls if your organization has Data.com Clean. You can only see the information on Search calls if you are assigned a Data.com Prospector user license.

Walk Through It: Check Data.com License Information

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

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

SEE ALSO:

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

How Do Licenses Work for Data.com Prospector?

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

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

Data.com User

Data.com Users get a limited number of account, contact, and lead records to add or export per month. The default number of records per licensed user is 300. The record addition limit for each licensed user refreshes at midnight on the first of the month (based on the time zone of the organization) regardless of your contract start date. Unused record additions expire at the end of

each month, *do not* rollover to the next month, and are not refundable. You can select the `Data.com Monthly Addition Limit` for each user. This is the number of account, contact, and lead records the user can add each month. You can select up to the organization limit for any user or all users, but once the organization's monthly limit is reached, users won't be able to add more records.

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

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

Data.com List User

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

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

SEE ALSO:

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

How Do Licenses Work for Data.com Clean?

If your org uses Data.com Prospector, users with those licenses can manually update the account, contact, and lead records they have access to. With a Data.com Clean license, you can use Data.com Clean jobs to update records. You can also use Data Integration to update records as they are added or saved. Users who have a Data.com Clean license can manually update records, even if they don't have a Data.com Prospector license.

The Data.com Licenses & Limits page in Setup describes the options available for each type of license.

📝 **Note:** If your org purchased only Data.com Prospector, only users with licenses can update records.

SEE ALSO:

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

Enable Data.com Clean for Data.com Prospector

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

📝 **Note:** This information applies to Data.com Clean and not to Data Integration.

📝 **Note:**

- If you've purchased Data.com Clean, you can clean account, contact, and lead records manually *and with automated jobs*. You can also use automated jobs to clean D&B Company records that are linked to account or lead records. For complete details, see Set Up Data.com Clean.

- Enabling Clean does not clean your records immediately. You can click **Disable** to turn off the feature.

- Data Integration is not automatically available with Data.com Prospector.

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

2. Confirm that Data.com Clean is enabled.

IN THIS SECTION:

Considerations for Custom Mapping of Data.com Clean and Salesforce Fields

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

Considerations for Allowing Duplicate Data.com Records in Salesforce

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

SEE ALSO:

Set Up Data.com Clean

Set Up Data Integration

Considerations for Custom Mapping of Data.com Clean and Salesforce Fields

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

📝 **Note:** This information applies to Data.com Clean and not to Data Integration.

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

Data.com Clean custom field mappings apply when:

- You add records to Salesforce using Data.com Prospector.

- You clean a single record, clean records in a list, or clean records with automated jobs.

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

- Mapping fields or updating mappings forces a full sync with Data.com: all records of enabled CRM objects (accounts, contacts, and leads) are updated, even if no records have changed.

- Data.com field mappings may conflict with any Salesforce field customizations (such as approvals, workflow rules, or Apex triggers) you use for accounts, contacts, leads, or D&B Company records. Review and edit your customizations as needed so they will work with the values supplied by your mappings.

- You can skip mapping individual Data.com fields, but values for skipped fields won't be added, exported, or considered when we calculate a record's clean status.

- Skipping or changing mappings for fields used to match Salesforce and Data.com records may change some records' clean status to `Not Found`.

- For account records, skipping or changing the mapping for the `D-U-N-S Number` field will cause all account jobs to use the Data.com matching service, rather than the `D-U-N-S Number` field, to rematch account records.

- If you map fields and also set Clean job preferences to flag, auto-fill, or overwrite Salesforce fields, you'll see any *custom-mapped* fields when you set those preferences. Default mappings (such as from the Data.com `Phone` field to the Salesforce `Phone` field) do not appear.

- If you export Data.com search results, the column headers in your Excel file will show the mapped field names. For example, if you map the Data.com `Phone` field to the Contact object's `Mobile` field, you'll see a header called "Mobile" for contacts, not "Phone".

- If you map Data.com fields that do not have values, some Salesforce records might revert to `Not Found` clean status.

- If you map a Data.com field to a custom Salesforce field, the custom field's label will appear on the Clean comparison page.

- If you want to track changes to field mappings, you'll find them in the Setup Audit Trail. From Setup, enter *View Setup Audit Trail* in the `Quick Find` box, then select **View Setup Audit Trail**.

IN THIS SECTION:

Default Data.com-to-Salesforce Field Mappings

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

Customize Data.com-to-Salesforce Field Mappings

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

SEE ALSO:

Considerations for Custom Mapping of Data Integration Rules

Default Data.com-to-Salesforce Field Mappings

Customize Data.com-to-Salesforce Field Mappings

Review Triggers and Workflow Rules for Data.com Compatibility

Default Data.com-to-Salesforce Field Mappings

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

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

📝 **Note:** This information applies to Data.com Clean and not to Data Integration.

Accounts

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

💡 **Tip:** Not all Data.com fields are mapped by default to the Account page. To map more Data.com fields to Account fields, see and check out the latest release notes to find new mappable fields.

Contacts

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

Leads

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

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

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

SEE ALSO:

Customize Data.com-to-Salesforce Field Mappings

Default Data.com-to-Salesforce Field Mappings

Customize Data.com-to-Salesforce Field Mappings

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

 Walk Through It: Customize Data.com-to-Salesforce Field Mapping

Data.com Clean custom field mappings apply when:

- You add records to Salesforce using Data.com Prospector.
- You clean a single record, clean records in a list, or clean records with automated jobs.

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

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

1. From Setup, enter the name of the object you want to map the Data.com fields to, for example, **Accounts**, then select **Fields**.

2. Click **New** next to Custom Fields & Relationships for the object you want to map the fields to, for example, **Accounts Custom Fields & Relationships**.

3. Tip: It's best to create all the fields in the object that you are adding fields to before mapping them from **Data.com Administration**.

   Follow the steps in the New Custom Field wizard. When your finished, be sure to click **Save**.

4. From Setup, enter **Data.com Administration**, then click **Field Mapping**.

5. Find the field you want to map, and select the custom mapping from the list box next to the field.

6. Click **Save**.

SEE ALSO:

Considerations for Allowing Duplicate Data.com Records in Salesforce

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

Keep these considerations in mind when setting your duplicate preferences.

- Records are considered duplicates when they have the same Data.com ID number in the `Data.com Key` field. This includes records that were added from Data.com as both contacts and leads.
- You can allow duplicates by object for the entire organization—not for individual users. If, however, you want to prevent a user or profile from being able to add duplicates, you can create a trigger.

EDITIONS

Available in: Salesforce Classic

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

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

USER PERMISSIONS

To implement Data.com:
- "Customize Application"

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

To install AppExchange packages:
- "Download AppExchange Packages"

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

- A green dot ( ) appears in the search results next to Salesforce records that have a value in the `Data.com Key` field (records that were imported or cleaned by Data.com). These records can be re-added by any Data.com user if your organization allows duplicates for the object.

- Records that have been added to Salesforce from Data.com are marked with a blue checkmark ( ) in search results. These records can be re-added by any Data.com user if your organization allows duplicates for the object. Adding a record affects the record balance only the first time that record is added to Salesforce: adding duplicates *does not* affect the record balance.

- If your Data.com preferences are set to allow duplicates but your organization also uses duplicate rules to prevent the creation of duplicate records, the duplicate rule will determine if the duplicate record is allowed or blocked.

Configure Data.com Prospector

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

> **Note:** To find out more about the Data.com Prospector product your organization has, from Setup, enter `Licenses & Limits` in the `Quick Find` box, then select **Licenses & Limits**. On the Licenses & Limits page, check the Data.com Prospector Licenses section.

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

Best Practices for Your Configuration

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

Configure Data.com Prospector

With Data.com Prospector, you get Dunn & Bradstreet fields for accounts and leads you add to Salesforce from Data.com.

> **Note:** To find out more about the Data.com Prospector product your organization has, from Setup, enter *Licenses & Limits* in the Quick Find box, then select **Licenses & Limits**. On the Licenses & Limits page, check the Data.com Prospector Licenses section.

Here's how to configure Data.com Prospector.

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

Best Practices for Your Configuration

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

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

  For custom profiles, assign both of the permissions `Read D&B Company records` and `Delete D&B Company records`.

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

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

Manage Access to Data.com Search Results and Related Features

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

The checkboxes under **Button Preferences** settings control whether specific Data.com Prospector features are visible to users in your org.

> ⚠ **Warning:** Changing button preferences impacts all features associated with `Find Contacts` and `Find Accounts` for both Classic and Lightning features.

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

2. In the **Button Preferences** section of the page, deselect what you want to hide or select what you want to show.

3. Click **Save**.

IN THIS SECTION:

Make Sure You Can See Data.com Prospecting Insights

Do you already have a Data.com Prospector license, but you don't see the See More Insights button on account details pages? Make sure you've enabled the News feature.

Enable Get More Contacts Button in Lightning Experience for an Existing Org

The Get More Contacts button shows up on the account details page only when the Button Preferences in Data.com Prospector Preferences are selected.

Make Sure You Can See Data.com Prospecting Insights

Do you already have a Data.com Prospector license, but you don't see the See More Insights button on account details pages? Make sure you've enabled the News feature.

1. From Setup, in the Quick Find box, enter `Account Settings` and then click **Account Settings**.

2. Click **Edit**.

3. Select **Enable News**.

4. Save your changes.

Enable Get More Contacts Button in Lightning Experience for an Existing Org

The Get More Contacts button shows up on the account details page only when the Button Preferences in Data.com Prospector Preferences are selected.

Already have a Data.com Prospector license, but don't see the Get More Contacts button on account detail pages? Make sure to select **Button Preferences** under Data.com Prospector Preferences.

Here is what to do to make the Get More Contacts button show up on your org's account details pages.

1. From Setup, in the Quick Find box, enter `Prospector Preferences` and then scroll to the Button Preferences section.

2. Select **Add to Salesforce** for both Find Contacts and Find Accounts.

3. Click **Save**.

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

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

In particular, you can mask out or remove:

- Email and phone values for contact and lead records already in Salesforce that have `Do Not Call` or `Email Opt Out` selected; and

- Email values for all contact and lead records with Canada addresses (to support Canada's privacy requirements)

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

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

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

Enable or Disable Data.com API Functionality

Data.com API functionality is enabled by default.

1. From Setup, in the Quick Find box, enter `Data.com Administration` and then select **Prospector Preferences**.

2. Select or deselect **Allow Data.com API Access**.

3. Save the page.

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

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

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

- If you add more than 200 leads to Salesforce at one time, any lead assignment rules your organization uses don't run. To make sure your lead assignment rules run, instruct your users to limit their additions to fewer than 200 leads at any time.

- If your organization uses validation rules on fields that are mapped to Data.com, either deactivate the rules or make sure that they match Data.com field names to avoid errors when adding records.

Resolve Data.com Record Addition Errors

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

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

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

1. Open the record addition error log and review the errors, then take one of these actions.

    - If you see errors regarding duplicate records, you don't need to do anything. *Duplicate* errors mean that the records are already in Salesforce, so you don't need to add them again. If your Data.com preferences are set to allow duplicates, the error log will not include any *duplicate* errors. If your Data.com preferences are set to allow duplicates but your organization also uses duplicate rules to prevent the creation of duplicate records, the duplicate rule will determine if the duplicate record is allowed or blocked. Records that are blocked by the duplicate rule will appear in the error log.

    - If you see errors regarding your organization's custom configurations, such as triggers, validation rules, or workflow, let your administrator know because they may need to correct these configurations.

    - If your organization uses state and country picklists and you see errors regarding available states or countries, notify your administrator, who will need to add the particular state or country to the picklist.

    - For all other errors, contact your administrator, who may need to contact Salesforce Customer Support.

2. After your administrator resolves the errors, try again to add the Data.com records to Salesforce.

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

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

📝 **Note:** This information applies to Data.com Clean and not to Data Integration.

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

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

SEE ALSO:

Report on Records with a Specific Data.com Clean Status

How Does Data.com Clean Match Your Records?

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

📝 **Note:** This information applies to Data.com Clean and not to Data Integration.

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

Watch a Demo: ▶ Understanding Matching Rules

Using Data.com Clean, your records and Data.com records can be compared and matched in two ways.

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

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

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

> **Note:**
> - If you prefer to rematch account records with the matching service, regardless of whether a D-U-N-S Number is present, contact Salesforce Customer Support. Doing so, however, can cause some account records to have their Data.com Clean status set to Not Found.
> - If you've remapped or skipped mapping for the `D-U-N-S Number` field, or if you purchased Data.com before December 16, 2011, the matching service is used to rematch account records.

For contacts and leads, the important fields are:

- `Name`
- `Email`

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

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

For accounts, the important fields are:

- `Account Name`
  - Make sure that the account name doesn't contain any unrelated artifacts, such as numbers (1002), special characters (!#@#), or unrelated words. (These symbols are acceptable if they are part of the company's name.)
  - Try to avoid country and state names as values unless they are part of the company's name.
  - If the account name contains more than one word, like DSGI Business (PC World Business), try both.
  - If an account name is also a Website (like `salesforce.com`), try leaving off the subdomain (for example, `.com`).

- `Billing Address`
  - Use a full address, if possible.
  - To optimize match rates, specify a value for the `Country` field.
  - Try to specify a value for the `State` or `ZIP code` field.
  - If you know the account's street name but not its street number, use the street name only. A street name without a street number is better than no value.

- `Website`
- `Phone`

Guidelines for Using D&B Company Records

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

- If your company has Data.com Prospector or Data.com Clean, you have access to the DandBCompany object, which provides Dun & Bradstreet data for accounts and leads that you add to Salesforce.

  📝 **Note:** The DandBCompany object is also available when you use the Company Info for Accounts or Company Info for Leads data integration rules.

- Make sure you add the D&B Companies tab to user profiles. That's how users access a list of all D&B Company records. The D&B Companies tab lists all the D&B Company records you have in Salesforce.

- To let your users delete D&B Company records, create a permission set with the "Delete D&B Company records" and "Read D&B Company records" permissions and assign the permission set to users. Also, make sure to add the Delete button to page layouts.

- If your company also uses Data.com Clean, you can use automated jobs to update your D&B Company records.

- Add the Refresh button to your D&B Company page layouts, so you can manually update D&B Company records to get the latest data from Dun & Bradstreet. You can also use automated jobs to update D&B Company records.

- D&B Company records linked to account records are not cleaned along with linked account records.

- For accounts or leads not added from Data.com (for example, created manually), if a corresponding D&B Company record exists, it is added to Salesforce and linked to the account or lead record the first time that record is cleaned.

- SIC8 code fields (for example, `Primary SIC8 Code`) are not updated when existing D&B Company records are refreshed—either manually or as part of a job. These fields are only populated when the D&B Company record is created. To get SIC8 code values for an existing D&B Company record, you can delete the record and then clean its corresponding account. This recreates the D&B Company record, and it now includes values for the SIC8 code fields. Alternatively, you can get SIC8 values from the Data.com Search API, and add them to the D&B Company record.

SEE ALSO:

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

D&B Company Fields

When you add or update an account or lead, a D&B Company record is created and linked to that account or lead via the `D&B Company` field. Click the link in the `D&B Company` field to access the associated D&B Company record, which has over 100 fields of industry, financial, and competitive information from Dun & Bradstreet.

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

👁 **Example:** If you update an account record for Google, when you open its record, the `D&B Company` field value is `Google`. The value is underlined to identify it as a link. Click it to open the Google D&B Company record.

> 📝 **Note:** Some D&B field labels are different from the object field labels they are mapped to. For example, the `Account Site` field on account records maps to the `Location Type` field on the linked D&B Company record. For a list of default mappings, see Default Data.com-to-Salesforce Field Mappings. on page 75

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

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

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

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

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

Field	Description
Primary SIC Code	The four-digit Standard Industrial Classification (SIC) code is used to categorize business establishments by industry. The full list of values can be found at the Optimizer Resources page maintained by Dun & Bradstreet.
Primary SIC Description	A brief description of an organization's line of business, based on its SIC code.
Primary Tradestyle	A name, different from its legal name, that an organization may use for conducting business. Similar to "Doing business as" or "DBA".
Prior Year Employees	The total number of employees for the prior year.
Prior Year Revenue	The annual revenue for the prior year.
Second SIC8 Code[*]	An additional SIC code used to further classify an organization by industry. Maximum size is 8 characters.
Second SIC8 Code Description	A brief description of an organization's line of business, based on the corresponding SIC code. Maximum size is 80 characters.
Second NAICS Code	An additional NAICS code used to further classify an organization by industry. See Primary NAICS Code.
Second NAICS Description	A brief description of an organization's line of business, based on the corresponding NAICS code. See Primary NAICS Description.
Second SIC Code	An additional SIC code used to further classify an organization by industry. See Primary SIC Code.
Second SIC Description	A brief description of an organization's line of business, based on the corresponding SIC code. See Primary SIC Description.
Second Tradestyle	An additional tradestyle used by the organization. See Primary Tradestyle.
Sixth NAICS Code	An additional NAICS code used to further classify an organization by industry. See Primary NAICS Code.
Sixth NAICS Description	A brief description of an organization's line of business, based on the corresponding NAICS code. See Primary NAICS Description.
Sixth SIC8 Code[*]	An additional SIC code used to further classify an organization by industry. Maximum size is 8 characters.
Sixth SIC8 Description	A brief description of an organization's line of business, based on the corresponding SIC code. Maximum size is 80 characters.
Sixth SIC Code	An additional SIC code used to further classify an organization by industry. See Primary SIC Code.
Sixth SIC Description	A brief description of an organization's line of business, based on the corresponding SIC code. See Primary SIC Description.

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

Field	Description
	the year the Dun & Bradstreet record was created will be used. Dun & Bradstreet does not supply this data for branch locations.

[*]Available with Data.com Prospector license only.

Administering Data.com FAQ

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

IN THIS SECTION:

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

Which Fields Are Affected by Data Integration Rules and Data.com Clean?
When you use Data.com to update a record, the record's fields are updated with Data.com data.

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

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

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

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

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

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

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

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

Which Fields Are Affected by Data Integration Rules and Data.com Clean?

When you use Data.com to update a record, the record's fields are updated with Data.com data.

📝 Note:

- If you use customized field mappings in your data integration rules, the fields affected by Data.com can differ from the ones that are listed.
- If you receive one of the following messages, contact your Salesforce admin. `You have limited access to data, so you cannot completely update this record` or `You have limited access to account fields, so you cannot update all the fields shown here.`

Account Fields

The following fields are available with Data.com Clean and with the Company Info for Accounts data integration rule. An asterisk (*) indicates fields that **aren't** available with the Company Info for Accounts data integration rule.

Account Name	Industry
Account Site	NAICS Code
Annual Revenue	NAICS Description
Billing Address	Ownership
Clean Status*	Phone
D&B Company	SIC Code
Data.com Key	SIC Description
D-U-N-S Number	Ticker Symbol
Description	Tradestyle
Employees	Website
Fax	Year Started

Contact Fields

The following fields are available with Data.com Clean.

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

Lead Fields

The following fields are available with Data.com Clean. An asterisk (*) indicates fields that are available with the Company Info for Leads data integration rule.

Address	Email
Annual Revenue*	Industry*
Clean Status	Name
Company	No. of Employees*
Company D-U-N-S Number*	Phone
D&B Company*	Title
Data.com Key	

Geocodes for Account Billing Address Fields

The following fields are available with the Geocodes for Account Billing Address data integration rule.

BillingLatitude	BillingLongitude
BillingGeocodeAccuracy	

> **Note:** These fields are not visible on records.

Geocodes for Account Shipping Address Fields

The following fields are available with the Geocodes for Account Shipping data integration rule.

ShippingLatitude	ShippingLongitude
ShippingGeocodeAccuracy	

> **Note:** These fields are not visible on records.

Geocodes for Contact Mailing Address Fields

The following fields are available with the Geocodes for Contact Mailing Address data integration rule.

MailingLatitude	MailingLongitude
MailingGeocodeAccuracy	

> **Note:** These fields are not visible on records.

Geocodes for Geocodes for Lead Address Fields

The following fields are available with the Geocodes for Lead Address data integration rule.

Latitude	Longitude
GeocodeAccuracy	

> **Note:** These fields are not visible on records.

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

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

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

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

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

SEE ALSO:

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

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

You sure can. Just follow these guidelines.

SEE ALSO:

Prevent Data.com Clean Jobs from Updating Records

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

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

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

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

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

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

Full Sync Job

All records are cleaned, regardless of their clean status.

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

Incremental Sync Job

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

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

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

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

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

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

SEE ALSO:

Schedule Data.com Clean Jobs

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

Set Up Data Integration

Set up Data Integration to continually update your org with the latest data.

Note: This information applies to Data Integration and not to Data.com Clean.

IN THIS SECTION:

1. Activate a Data Integration Rule

   To enable Data Integration for accounts, contacts, or leads, activate data integration rules. After you activate a rule, Data.com updates all records in the object. Data.com then continually updates records when you add or change them.

2. Configure Page Layouts for Data Integration

   When you activate data integration rules, make Data Integration features available to your users by adding buttons and fields to your account, contact, and lead page layouts.

3. Guidelines for Setting Up Company Info Data Integration Rules

   Follow important guidelines when using Data.com data integration rules to automatically update your accounts and leads.

4. Create a Custom Report Type for Account, Contact, or Lead Data Integration Info

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

5. Considerations for Custom Mapping of Data Integration Rules

   Data integration rules have an update field mapping that controls how Data.com updates your records. Rules provide a customizable default field mapping. Before you change an update mapping, make sure that you understand how mapping works, what preparations to make, and what kind of results to expect.

6. What Is Data Refresh?

   Data services can automatically perform a full sync of your records on a regular schedule. The services also report when data they had previously is no longer available.

SEE ALSO:

Activate a Data Integration Rule

Configure Page Layouts for Data Integration

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

Activate a Data Integration Rule

To enable Data Integration for accounts, contacts, or leads, activate data integration rules. After you activate a rule, Data.com updates all records in the object. Data.com then continually updates records when you add or change them.

> **Note:** This information applies to Data Integration and not to Data.com Clean.

Enable Data Integration for accounts, contacts, or leads by activating the data integration rule you want to use.

1. From Setup, enter `Data Integration Rules` in the `Quick Find` box.

2. From the View dropdown, select **All Data Integration Rules**.

3. Look at the Current Status column. If the status for the rule contains the word Active, you're done. You can activate other data integration rules.

   a. If the status for the rule is Inactive, click the name of the rule.

   b. In the detail page for the rule, click **Activate** to activate the rule.

   c. In the dialog that appears, click **OK** to activate the rule.

   d. To return to the list of data integration rules, click **Back to List: Data Integration Rules**.

The data integration rule is active, so Data Integration is enabled for this particular rule.

<div style="border-left: 2px solid #666; padding-left: 1em;">

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Company Info for Accounts and Company Info for Leads rules require a Data.com Premium Clean license.

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

USER PERMISSIONS

To enable or disable Data Integration:
- "Customize Application"

</div>

Configure Page Layouts for Data Integration

When you activate data integration rules, make Data Integration features available to your users by adding buttons and fields to your account, contact, and lead page layouts.

> **Note:** This information applies to Data Integration and not to Data.com Clean.

> **Note:** If you use Professional Edition, add *all* available Data.com fields and buttons to your page layout for each object (accounts, contacts, leads, and D&B Companies). Custom page layouts aren't available in Professional Edition.

> **Note:** This task is necessary only in Salesforce Classic.

1. From Setup, `Accounts` in the **Quick Find** box.

2. Select **Page Layouts**, then click **Edit** next to the page layout you want to update.

3. On the **Account Layout** page, from the list of page element categories, click **Related Fields**.

4. Drag the **Data Integration Rules** related list into place on the page where you want it to appear.
   The **Data Integration Rules** related list appears.

5. To save the layout, click **Save**.

6. Repeat the previous steps for the **Contacts** and **Leads** page layouts.

<div style="border-left: 2px solid #666; padding-left: 1em;">

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Company Info for Accounts and Company Info for Leads rules require a Data.com Premium Clean license.

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

USER PERMISSIONS

To customize page layouts:
- "Customize Application"

To view page layouts:
- "View Setup and Configuration"

</div>

Guidelines for Setting Up Company Info Data Integration Rules

Follow important guidelines when using Data.com data integration rules to automatically update your accounts and leads.

Adjustments for Salesforce Classic Users

To allow Salesforce Classic users to check a record's update status and update it manually, adjust the lead or account page layout. Add the Data Integration Rules related list to the layout.

Access for Users Who Update Records Manually

Access to D&B Company Object

Make sure that users have "Read" and "Create" access to the D&B Company object. When a user updates a record, the rule creates an associated D&B Company record (if the record doesn't exist).

Access to Account Fields

For the Company Info for Accounts rule, adjust field-level security to give users access to the account fields containing data provided by the rule.

Account Name	Description	Phone
Account Site	Employees	SIC Code
Annual Revenue	Fax	SIC Description
Billing Address	Industry	Ticker Symbol
Company D-U-N-S Number	NAICS Code	Tradestyle
D&B Company	NAICS Description	Year Started
Data.com Key	Ownership	Website

Access to Lead Fields

For the Company Info for Leads rule, adjust field-level security to give users access to the following fields on leads.

- Annual Revenue
- D&B Company
- Company D-U-N-S Number
- Industry
- No. of Employees

Note: In Professional Edition, you control field-level security using page layouts.

SEE ALSO:

Set Up Company Info Data Integration Rules

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

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

> **Note:** This information applies to Data Integration and not to Data.com Clean.

> **Note:** You can't create custom reports for geocode data integration rules. To view geocode update status, use the Salesforce API.

Use custom reports to see the update status of records updated with data integration rules. Before you create the report itself, you have to create a custom report type that brings together the data you need to report on.

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

   If you see the page entitled **What is a Custom Report Type?**, click **Continue**.

2. Click **New Custom Report Type** to go to the page **Step 1. Define the Custom Report Type**.

3. Enter information for the custom report type:

   a. For **Primary Object**, select the object type you want to report on.
   For example, to report on update status for accounts, select **Accounts**.

   b. Enter a label and description for the report type.
   For the report name, accept the name that Salesforce inserts .
   For example:

      - **Report Type Label**: AccountDataIntegrationReportType
      - Custom report type for reporting Data Integration update status for accounts

   c. From the **Store in Category** dropdown, select a category for the report type.

      - For a report type for accounts or contacts, select **Accounts & Contacts**.
      - For a report type for leads, select **Leads**.

   d. Until you're ready to give the custom report to users, select a deployment status of **In Development**.

4. Click Next to go to **Step 2. Define Report Records Set**.

5. To connect the data integration status object to an accounts, contacts, or leads object, click the box labeled **(Click to relate another object)**.

    a. From the dropdown, select **Integration Rule Info**.

    b. For A to B relationship, click **Each "A" record must have at least one related "B" record**.

6. Click **Save**.

Now you can create custom reports based on your new custom report types. Add `Data Integration Status` to the report layout, along with any other fields you want to report on.

> **Note:** By default, the report contains all the active data integration rules for the object you're reporting on. To filter the report for a specific rule, use the `Description` field in the `Integration Rule Info` object. For example, use the filter `IntegrationRuleInfo.Description` contains "Company Info for Accounts".

Considerations for Custom Mapping of Data Integration Rules

Data integration rules have an update field mapping that controls how Data.com updates your records. Rules provide a customizable default field mapping. Before you change an update mapping, make sure that you understand how mapping works, what preparations to make, and what kind of results to expect.

> **Note:** This information applies to Data Integration and not to Data.com Clean.

Each data integration rule has a default update field mapping that controls how Data.com data is put into fields in your account, contact, or lead records. Whenever you add an account, contact, or lead, Data.com updates the record according to the active rules. You can customize the update field mappings so that Data.com puts data into different fields, including custom fields.

Before you activate a rule or modify its update mapping, make sure that you understand these considerations.

- When you activate a rule or modify its match or update mappings, Data.com does a *bulk* update of *all* the records affected by the rule. You can control this behavior by editing the rule's settings.

- Rule-based updates are independent of field customizations (such as approvals, workflow rules, or Apex triggers) you use for accounts, contacts, or leads. Review and edit your customizations to ensure they work with updated values.

- Data integration rules automatically fill fields in your records that are blank. Otherwise, rules don't overwrite your data.

- You can create custom fields for your records, and then map them to Data.com fields.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Company Info for Accounts and Company Info for Leads rules require a Data.com Premium Clean license.

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

What Is Data Refresh?

Data services can automatically perform a full sync of your records on a regular schedule. The services also report when data they had previously is no longer available.

> **Note:** This information applies to Data Integration and not to Data.com Clean.

Data services keep your data current by doing an update of your records at regular intervals. The process is automatic, and you can't change or view the interval.

As part of the refresh process, a data service detects if data it provided before is no longer current. The data service doesn't delete the data from your records. Instead, it marks the data as **Inactive**.

> **Example:** When you use a data service to update account records, the service displays the data on the account detail page, as either a related list or a link. From the account detail page, you can see all the data the service has added to your org and linked to your account. If the updated data is no longer available, the service marks it as inactive.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Company Info for Accounts and Company Info for Leads rules require a Data.com Premium Clean license.

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

Set Up Data.com Clean

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

> **Note:** This information applies to Data.com Clean and not to Data Integration.

> **Note:** If you're using Data.com Prospector together with Data.com Clean, see Set Up Data.com Prospector on page 69.

IN THIS SECTION:

1. Confirm That Data.com Clean Is Enabled

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

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

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

3. Set Field-Level Security for Data.com Clean

   If you use Data.com Prospector or Data.com Clean, you can view various D&B fields on account records. Those fields are included when users manually clean records. To make sure that your users can read and edit the fields and their values and that the fields appear on the Account Card, set field-level security.

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

   Data.com Clean preferences control the records you want to update and how you want to update them. The preferences include selecting the matching service used to update accounts.

5. Set Up Data.com Clean Jobs

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

6. Review Triggers and Workflow Rules for Data.com Compatibility

   If your orgs uses triggers or workflow rules on objects that you update with Data.com, review the triggers and workflows and consider adjusting them or bypassing them so users don't encounter unexpected results when records are updated.

7. Configure List Views for Data.com Clean

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

8. Set Up Data Integration Rules

   Up-to-date information helps your users maintain customer relationships and pursue promising leads. Give your users the latest account, contact, and lead information by setting up data integration rules.

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

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

Confirm That Data.com Clean Is Enabled

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

📝 **Note:** This information applies to Data.com Clean and not to Data Integration.

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

After you enable Clean, you can set preferences and control Clean jobs. The Preferences and Jobs links appear in Setup in the Clean section.

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

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

2. Confirm that Data.com Clean is enabled.

SEE ALSO:

Set Up Data.com Clean

Set Up Data Integration

EDITIONS

Available in: Salesforce Classic

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

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

USER PERMISSIONS

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

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

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

> **Note:** This information applies to Data.com Clean and not to Data Integration.

> **Note:** If you use Professional Edition, add *all* available Data.com fields and buttons to your page layout for each object (accounts, contacts, leads, and D&B Companies). Custom page layouts aren't available in Professional Edition.

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

2. From the list of page layouts, edit each layout to be used by your Data.com Prospector or Data.com Clean users.

3. On the Account Layout page, from the list of page element categories, click **Fields**.

4. Drag the `Clean Status` field into place on the page where you want it to appear.

5. If you use Data.com Prospector, add the D&B fields you want users to see. These include `Account Site`, `D-U-N-S Number`, `NAICS Code`, `Tradestyle`, and more. For a complete list of the D&B fields available on account records, see Account Fields.

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

6. If you want your users to be able to refresh D&B Company records, add the **Refresh** button to D&B Company page layouts.

7. If you use the Do Not Auto-Update validation rule provided in the Data.com Reports AppExchange package, add the `Data.com Does Not Auto-Update` field.

8. From the list of page element categories, click **Buttons**. Drag the **Clean**, **Get Contacts**, **Prospecting Insights**, and **Company Hierarchy**[*] buttons into place on the page.

   [*]Available only with a Data.com Prospector license

9. Click **Save**.

10. From the object management settings for leads, go to Page Layouts.

11. Repeat the steps to add the `Clean Status` field and the **Clean** button to your Lead page layouts.

12. If you use Data.com Prospector, add the `Company D-U-N-S Number` and `D&B Company` fields.

13. If you use the Do Not Auto-Update validation rule provided in the Data.com Reports AppExchange package, add the `Data.com Does Not Auto-Update` field.

14. From the object management settings for contacts, go to Page Layouts.

15. Repeat the steps to add the `Clean Status` field and **Clean** button to your Contact page layouts. (Contacts don't include any D&B fields.)

16. If you use the Do Not Auto-Update validation rule provided in the Data.com Reports AppExchange package, add the `Data.com Does Not Auto-Update` field.

17. If you use Data.com Prospector, from the object management settings for D&B Companies, go to Page Layouts.

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

SEE ALSO:

Set Field-Level Security for Data.com Clean

If you use Data.com Prospector or Data.com Clean, you can view various D&B fields on account records. Those fields are included when users manually clean records. To make sure that your users can read and edit the fields and their values and that the fields appear on the Account Card, set field-level security.

> **Note:** This information applies to Data.com Clean and not to Data Integration.

Set field-level security for these fields.

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

There are multiple ways to set field-level security (such as by profile or permission set). However, in this case, field-level security is needed for only 10 fields. We therefore recommend starting from the fields and choosing the user profiles for users who use Data.com.

1. From the management settings for accounts, go to the fields section.

2. Click the field label to open the detail page for each of the fields.

3. On each field's detail page, click `Set Field-Level Security`. For each profile whose users read and edit the fields, select **Visible**. For example, if you want users in the Standard User profile to use Data.com Clean, select **Visible** for that profile.

> **Note:** These fields are maintained by Data.com Clean. For that reason, making them editable by setting the field-level security to **Visible** can create mismatched data when a Clean job is run.

SEE ALSO:

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

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

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

Data.com Clean preferences control the records you want to update and how you want to update them. The preferences include selecting the matching service used to update accounts.

> 📝 **Note:** This information applies to Data.com Clean and not to Data Integration.

If you don't have a Data.com Clean license for your Salesforce org, you can't select preferences for jobs.

1. Review the guidelines for selecting a matching service used to update accounts.

2. From Setup, enter `Preferences` in the `Quick Find` box, then select **Preferences** under the Clean section.

3. Select the matching service for updating accounts. If you select D&B DUNSRight™ matching service, adjust your confidence code if needed.
   D&B's Confidence Code ranks Data.com match candidates based on their similarity to your record, from 1 (not similar) to 10 (identical or highly similar). Data.com doesn't automatically match its records if the similarity score is less than the code you select here. If multiple records match with a similarity score at or above your selection, Data.com returns the best match. When you manually update some records, you can select a match between the preset confidence code (5) and the code you select here.

4. Review the guidelines for selecting job preferences.

5. Make sure that the **Enable Clean jobs** option is selected for each object that you want to update. If you have a Data.com Clean license and you want to update D&B Company records, select the **Enable Clean jobs for D&B Companies** checkbox.

6. For each object you've enabled, select your Clean preference.

7. Click **Save** to save your preferences.

IN THIS SECTION:

Guidelines for Selecting an Account Matching Service

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

Guidelines for Selecting Data.com Clean Job Preferences

Review the preferences you can set before you define your Data.com Clean jobs.

SEE ALSO:

Set Up Data.com Clean

Set Up Data.com Clean Jobs

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

USER PERMISSIONS

To implement Data.com:
- "Customize Application"

Guidelines for Selecting an Account Matching Service

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

📝 **Note:** This information applies to Data.com Clean and not to Data Integration.

The available matching services are:

Data.com matching

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

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

D&B DUNSRight™ matching

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

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

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

SEE ALSO:

Set Up Data.com Clean

Considerations for Scheduling Data.com Clean Jobs

Guidelines for Selecting Data.com Clean Job Preferences

Set Up Data.com Clean Jobs

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

Guidelines for Selecting Data.com Clean Job Preferences

Review the preferences you can set before you define your Data.com Clean jobs.

> 📝 **Note:** This information applies to Data.com Clean and not to Data Integration.

- Data.com Clean offers three options for cleaning your data with jobs. Jobs can do the following:
  - `Flag all differences per record` to *only identify* fields whose values are different from Data.com values
  - `Flag differences and auto-fill blank fields` to identify fields whose values are different *and fill blank fields* with values from Data.com.
  - `Customize settings field by field.`

- If you select the `Customize` option for any object, you can do the following:
  - Flag fields on your Salesforce records that have different values from matched Data.com records.
  - Flag different field values on your Salesforce records and automatically fill blank fields with Data.com values.
  - Overwrite different field values on your Salesforce records with Data.com values. If you overwrite Salesforce record values, set history tracking for those fields.

- You can set flag-only and flag and auto-fill preferences for entire records or by field. You set overwrite preferences by field.

- If you use Data.com Clean, you can also clean D&B Company records that are linked to accounts and leads. D&B Company Clean jobs automatically fill or overwrite field values on D&B company records, but do not change data on linked account or lead records.

- Your preferences take effect when the next scheduled Clean job runs, and users see the flags, as appropriate, when they clean records manually.

- If, after changing matching services, you want to do a one-time rematch using the new matching service, you can manually remove the `D-U-N-S Number` on account records to force the matching service to rematch the records. Be aware that this can affect your match rates.

- We don't recommend mapping a custom field or skipping mapping for either matching service.

- Converted leads are excluded from Lead Clean jobs.

- If you select a field to be overwritten by Clean jobs, and a user marks that field as *wrong* on a record, jobs don't overwrite that field on that record.

- Person accounts are excluded from Account and Contact Clean jobs.

SEE ALSO:

Set Up Data.com Clean

Set Up Data.com Clean Jobs

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

Guidelines for Selecting an Account Matching Service

Set Up Data.com Clean Jobs

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

📝 **Note:** This information applies to Data.com Clean and not to Data Integration.

IN THIS SECTION:

Considerations for Scheduling Data.com Clean Jobs

Review considerations for scheduling your records to be updated automatically using Data.com Clean jobs.

Schedule Data.com Clean Jobs

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

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

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

Prevent Data.com Clean Jobs from Updating Records

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

Review Data.com Clean Job History

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

<table>
<tr><td>**EDITIONS**</td></tr>
<tr><td>Available in: Salesforce Classic and Lightning Experience</td></tr>
<tr><td>Available with a Data.com Clean license</td></tr>
<tr><td>Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions</td></tr>
</table>

Considerations for Scheduling Data.com Clean Jobs

Review considerations for scheduling your records to be updated automatically using Data.com Clean jobs.

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

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

<table>
<tr><td>**EDITIONS**</td></tr>
<tr><td>Available in: Salesforce Classic and Lightning Experience</td></tr>
<tr><td>Available with a Data.com Clean license in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions</td></tr>
</table>

- Use your sandbox environment to try out automated Clean jobs before running them in your production org with live data. After Data.com Clean is provisioned in your production org, refresh your sandbox so it has the same permissions and data. Then follow the steps in Implementing Data.com Clean to set up Data.com Clean in your sandbox. If everything runs smoothly in your sandbox environment, follow the same implementation steps in your production org.

- Jobs scheduled in a sandbox environment expire after 30 days.

- For best results, include a valid value for the `Country` and `State/Province` fields.

- Before scheduling jobs, schedule regular backups of your account, contact, and lead data. It's always a good practice, and if your Salesforce records are ever matched inappropriately, you can revert to previous versions.

- Set up field history tracking for accounts, contacts, and leads. Field history tracking helps you identify changes to field values, and tracks who made changes and when. If you use field history tracking, make sure you add the Account History, Contact History, and Lead History related lists to those objects' respective page layouts.

- Jobs do not process person account records.

- The Company Info for Accounts data integration rule conflicts with Clean jobs. To avoid conflicts, see Considerations for Setting Up Company Info Data Integration Rules.

SEE ALSO:

    Set Up Data.com Clean

    Set Up Data.com Clean Jobs

    Guidelines for Selecting an Account Matching Service

Schedule Data.com Clean Jobs

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

1. Review the considerations before scheduling jobs.

2. From Setup, enter *Jobs* in the `Quick Find` box, then select **Jobs** under the Clean section.

3. Select the days of the week when you want jobs to run.

4. Select your preferred start time.

   📝 Note: Jobs run independently, so their exact start times may vary.

5. Click **Save**.

SEE ALSO:

    Set Up Data.com Clean

    Set Up Data.com Clean Jobs

    Considerations for Scheduling Data.com Clean Jobs

    Review Data.com Clean Job History

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

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

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

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

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

1. From Setup, enter *Jobs* in the `Quick Find` box, then select **Jobs** under Data.com.

2. Click the button next to **Full Sync With Next Job** to turn full sync **On**.
   After the requested full sync runs, the button changes to **Off**.

SEE ALSO:

  Set Up Data.com Clean

  Set Up Data.com Clean Jobs

Prevent Data.com Clean Jobs from Updating Records

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

IN THIS SECTION:

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

  Use Custom Fields and Validation Rules to Prevent Data.com Clean Jobs from Updating Records
  Use a custom field to identify the records you don't want auto-updated. Then, create a validation rule that tells jobs to skip these records.

SEE ALSO:

  Set Up Data.com Clean Jobs

  Set Up Data.com Clean

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

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

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

1. From Setup, enter *Preferences* in the `Quick Find` box, then select **Preferences** under the Clean section.

2. Select `Skipped records` from the Job Bypass Preferences for Accounts, Contacts, and Leads jobs.

3. Save your preferences.

4. Set the `Clean Status` to *Skipped* for records that you don't want jobs to update.

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

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

SEE ALSO:
Use Custom Fields and Validation Rules to Prevent Data.com Clean Jobs from Updating Records
Writing Your First Apex Class and Trigger

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

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

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

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

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

Field	Value or Selection
Field Type	Checkbox
Field Label	*Data.com Does Not Auto-Update*
Default Value	Unchecked

Field	Value or Selection
Description	*Prevents automated Clean jobs from updating fields with the matched Data.com record's values.*
Help Text	*Exclude this record from automated field updates from Data.com Clean jobs*

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

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

Field	Value or Selection
Rule Name	*Block_autoupdate_from_Data_com*
Description	*Record-level prevention of automated Clean jobs from automatically updating field values.*
Error Condition Formula (for Accounts)	(***YOUR CUSTOM FIELD API NAME***) && ($User.Alias = "autocln") && (ISCHANGED(DunsNumber) || ISCHANGED(NumberOfEmployees) || ISCHANGED(AnnualRevenue) || ISCHANGED(TickerSymbol) || ISCHANGED(Website) || ISCHANGED(Industry) || ISCHANGED(Ownership) || ISCHANGED(BillingCity) || ISCHANGED(BillingCountry) || ISCHANGED(BillingState) || ISCHANGED(BillingStreet) || ISCHANGED(BillingPostalCode) || ISCHANGED(Phone) || ISCHANGED(Fax) || ISCHANGED(Site) || ISCHANGED(Tradestyle) || ISCHANGED(YearStarted) || ISCHANGED(Sic) || ISCHANGED(SicDesc) || ISCHANGED(NaicsCode) || ISCHANGED(NaicsDesc) || ISCHANGED(Description))
Error Condition Formula (for Contacts)	(***YOUR CUSTOM FIELD API NAME***) && ($User.Alias = "autocln") && (ISCHANGED(Title) || ISCHANGED(Email) || ISCHANGED(Phone) || ISCHANGED(MailingStreet) || ISCHANGED(MailingCity) || ISCHANGED(MailingState) || ISCHANGED(MailingCountry) || ISCHANGED(MailingPostalCode))

Field	Value or Selection
Error Condition Formula (for Leads)	(**YOUR CUSTOM FIELD API NAME**) && ($User.Alias = "autocln") && (ISCHANGED(Company) || ISCHANGED(Title) || ISCHANGED(Email) || ISCHANGED(Phone) || ISCHANGED(Street) || ISCHANGED(City) || ISCHANGED(State) || ISCHANGED(PostalCode) || ISCHANGED(Country) || ISCHANGED(NumberOfEmployees) || ISCHANGED(AnnualRevenue) || ISCHANGED(Industry) || ISCHANGED(CompanyDunsNumber))
Error Message	*This record has been excluded from automated field updates from Data.com Clean jobs.*

3. Open each record that you don't want to be auto-updated, and select `Do Not Auto-Update` (or whatever you've named the custom field).

When automated jobs run, for each record that is not updated, you see a message in the job log: "`This record has been excluded from automated field updates from Data.com Clean jobs.`"

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

SEE ALSO:

Review Data.com Clean Job History

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

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

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

2. View job details in the Clean Jobs History section.

3. If the job encountered errors when processing records, click the link in either the `Batch Errors` or `Entity Errors` columns to download the job log `.csv` file.

We store job logs for 21 days.

Here are the definitions for the table columns.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

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

Column Heading	Definition
Date	The date the job was run.
Time Submitted	The time the job was submitted to the job queue. Jobs run independently, so this might not be the exact time the job was run.
Job Type	The type of job: for Accounts, D&B Companies, Contacts, or Leads.
	There are multiple types of account jobs.
	`Account (Data.com Matching)`: the Data.com matching service was used to match the account records.
	`Account (DUNSRight Matching)`: the DUNSRight matching service was used to match the account records.
	`Account (D-U-N-S Number Lookup)`: the `D-U-N-S Number` field, if present, was used to rematch (or look up) the account records.
Job Status	The status of the job:
	`Queued`: the job is in the queue to run. For jobs in this status, the `Time Submitted` column displays a dash (–).
	`Preparing`: the job is being prepared to run.
	`Processing`: the job is in process.
	`Completed`: the job has finished running (with or without errors).
	`Failed`: the job failed to run.
	`Aborted`: the job was aborted before or while it ran.
Records	The total number of Salesforce records processed by the job.
Matched	The total number of Salesforce records the job matched to Data.com records.
Unmatched	The total number of Salesforce records the job did not match to Data.com records.
Inactive	The number of Salesforce records that are marked as `Inactive` in Data.com.
Batch Errors	The total number of batch errors a job encountered while it ran. A dash indicates either no errors or no data. If the job produces a batch error job log, click the link to download and open its .csv file.
Entity Errors	The total number of entity errors a job encountered while it ran. A dash indicates either no errors or no data. If the job produces an entity error job log, click the link to download and open its .csv file. There you'll find an explanation of any entity error that was produced because a record failed to save—for example, because of a validation rule failure. Entity errors usually result from validation

Column Heading	Definition
	rule failures or required field violation. If an explanation exists, we'll provide it.
	The unique ID of a record that produced an error during the job. To open the record, append the 15-digit ID to the URL of your Salesforce instance. For example: `https://na1.salesforce.com/`*`0013000000hKBTq`*`.`

SEE ALSO:

Set Up Data.com Clean

Set Up Data.com Clean Jobs

Review Triggers and Workflow Rules for Data.com Compatibility

<table>
<tr><td colspan="2">USER PERMISSIONS</td></tr>
<tr><td>To implement Data.com Clean:</td><td>"Customize Application"</td></tr>
<tr><td>To implement Data.com Prospector:</td><td>"Customize Application"</td></tr>
<tr><td>To implement Data Integration:</td><td>"Customize Application"</td></tr>
<tr><td>To define triggers:</td><td>"Author Apex"</td></tr>
<tr><td>To define workflow rules:</td><td>"Customize Application"</td></tr>
</table>

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

If your orgs uses triggers or workflow rules on objects that you update with Data.com, review the triggers and workflows and consider adjusting them or bypassing them so users don't encounter unexpected results when records are updated.

> **Note:** This information applies to Data Integration *and* to Data.com Clean.

1. If you use triggers on any object that's updated by Data.com, from the object's management settings, go to Triggers.

2. Open and examine each trigger to make sure that your system or users don't encounter unexpected results when records are updated.

   If you find that one or two triggers cause unexpected results, try adjusting those triggers.

   - If you use Clean jobs and find multiple triggers that can cause unexpected results, bypass the triggers when jobs are run. Select that option on the Clean Preferences page. From Setup, enter *Preferences* in the `Quick Find` box, then select **Preferences** under Clean.

   - If you use Data Integration and find multiple triggers that can cause unexpected results, bypass the triggers when data integration rules run. From Setup, enter *Data Integration Rules* in the `Quick Find` box. Select each rule, click **Edit Rule Settings**, select **Bypass triggers**, and then click **Save**.

     > **Note:** In data integration rules for custom objects, triggers aren't bypassed even if **Bypass triggers** is selected.

3. If you use workflows, from Setup, enter `Workflow Rules` in the `Quick Find` box, then select **Workflow Rules**.

4. Open and examine each workflow rule to make sure that your system or users don't encounter unexpected results when records are cleaned.

If you find that one or two workflow rules cause unexpected results, try adjusting those rules.

- If you use Clean jobs and find multiple rules that can cause unexpected results, bypass the workflow rules when jobs are run. You can select that option on the Clean Preferences page. You can select that option on the Clean Preferences page. From Setup, enter `Preferences` in the `Quick Find` box, then select **Preferences** under Clean.

- If you use Data Integration and find multiple workflow rules that can cause unexpected results, bypass the workflow rules when data integration rules run. From Setup, enter `Data Integration Rules` in the `Quick Find` box. Select each rule, click **Edit Rule Settings**, select **Bypass workflow rules**, and click **Save**.

5. For all triggers and workflow rules you're using, check results on affected object records.

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

SEE ALSO:

[Considerations for Setting Up Company Info Data Integration Rules](#)

Configure List Views for Data.com Clean

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

📝 Note: This information applies to Data.com Clean and not to Data Integration.

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

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

2. Select a view from the drop-down and click **Edit**.

3. Scroll the Available Fields list to find the `Clean Status` field, then add it to the list of Selected Fields.
The **Clean** button is automatically added to the list view.

SEE ALSO:

[Set Up Data.com Clean](#)

Set Up Data Integration Rules

Up-to-date information helps your users maintain customer relationships and pursue promising leads. Give your users the latest account, contact, and lead information by setting up data integration rules.

IN THIS SECTION:

Data Integration Rules

Data integration rules are provided by a data service to control how the service updates your Salesforce records. Rules tell the data service how to find records to update and which updates to make. Rules also control how updates affect other features, such as triggers and workflow rules.

Automatically Get Geocodes for Addresses

Take advantage of geocodes to help your sales and marketing teams find nearby prospects and assign territories and campaigns. Using geocode data integration rules, you can automatically get geocodes for addresses on accounts, contacts, and leads.

Automatically Update Accounts and Leads with Critical Company Information

Make it easier for your sales teams to pursue the most promising leads, segment accounts, plan territories and campaigns, and understand customers better. Company Info rules provide access to over 100 fields of company, industry, and financial information from Dun & Bradstreet using the same fields as Data.com Clean.

Guidelines for Determining How Well Data Integration Rules Are Working

Do you want to know how well Data Integration is working for your organization? Check out the Data Integration Metrics page, which shows the match rate for your data integration rules. You see the percentage of your records that matched a record in the data service. When your record matches, the data service can update it with the latest data.

Standard Data Integration Rules

Key details about the standard data integration rules include how each rule works and the fields it affects.

Statuses for Data Integration

If you've activated data integration rules, you see an update status on records. This status indicates how the record's data compares with the data in the rule's data service.

Data Integration Rules

Data integration rules are provided by a data service to control how the service updates your Salesforce records. Rules tell the data service how to find records to update and which updates to make. Rules also control how updates affect other features, such as triggers and workflow rules.

> 📝 **Note:** You don't need a Data.com license to use every data integration rule. Some rules provided by Data.com, such as geocode data integration rules, are available for free. You can also use data services in data packages provided by third parties without a Data.com license. Data integration rules are independent of other Data.com features, though some rules update the same records as other Data.com features such as Clean jobs.

Data integration rules control the data service and how it does updates.

Data Service

Each rule is associated with a single data service, but the service can provide more than one rule. For example, a geocode data service can provide one rule for updating accounts and another for updating contacts.

Rule State

Rules are either inactive or active. Inactive rules don't do updates, but you can update their settings. You can also update settings for active rules, but the data service does a full update on all records after you save your changes.

Salesforce Object

The object that the data service updates. The Data.com Company Info for Accounts rule, for example, updates records in the accounts object.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Company Info for Accounts and Company Info for Leads rules require a Data.com Premium Clean license.

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

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Match Mappings

The criteria the data service uses to find your records. The criteria are stored as a match field mapping between fields in the data service and fields in the object.

Update Mappings

The fields that the data service updates when it finds a match. These fields are stored as an update field mapping between fields in the data service and fields in the object.

Perpetual Updates

Data integration rules are designed to do automatic updates whenever you add or modify a record.

Data Refresh

Active rules automatically refresh all your records at regular intervals.

Trigger and Workflow Rule Control

You can set a rule to bypass triggers and workflow rules after an update.

Last-modified Data

You can prevent a rule from changing a record's last-modified data after an update.

After you activate a data integration rule, it immediately goes to work. Existing records are checked to see if new data is available. New records are checked when they're saved. If new data is available, the record is updated based on the data integration rule settings.

👁 Example: You have an app that assigns leads to territories based on the latitude and longitude of lead addresses, but your records don't have the latest latitude and longitude data. To fix the problem, set up and activate the `Geocodes for Lead Address` data integration rule. Then, geocode information is automatically added to all your existing *and* new leads. Here's a summary for this rule.

Attribute	Value
Name	`Geocodes for Lead Address`
Data Service	Data.com Geo
Object	Lead
Fields Updated	Latitude, longitude, and accuracy fields associated with the `Address` field: • `Latitude` • `Longitude` • `GeocodeAccuracy` ✏️ Note: These fields can't be added to the page layout. However, you can view them using custom formula fields or by querying the Salesforce API.
How Fields Are Updated	Overwrite
Update All Records When the Rule Is Activated or Saved	Yes
Bypass Triggers?	Yes
Bypass Workflow Rules?	Yes

Attribute	Value
Do Not Update Last Modified Info	Yes

SEE ALSO:

Set Up Data Integration Rules

Standard Data Integration Rules

Automatically Get Geocodes for Addresses

Take advantage of geocodes to help your sales and marketing teams find nearby prospects and assign territories and campaigns. Using geocode data integration rules, you can automatically get geocodes for addresses on accounts, contacts, and leads.

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

IN THIS SECTION:

Considerations for Setting Up Geocode Data Integration Rules

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

Set Up Geocode Data Integration Rules

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

Guidelines for Setting Up Geocode Data Integration Rules

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

Update a Record with Geocode Information

Geocode data integration rules add geocodes for addresses on your accounts, contacts, and leads. From the record's detail page, you can check its update status or manually update the record.

Verify That Geocodes Were Added to Records

Because geocode fields are not typically visible on a record, you need to complete a few steps to verify that a Data.com data integration rule added the geocodes.

Geocode Fields

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

> **EDITIONS**
>
> Available in: Salesforce Classic and Lightning Experience
>
> Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Considerations for Setting Up Geocode Data Integration Rules

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

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

- The following actions occur when geocode information is added to records:
  - Existing values in geocode information fields are overwritten.
  - The `SystemModStamp` field is always updated. Review any integrations that use this field to make sure that they aren't affected.
  - By default, the `LastModifiedDate` and `LastModifiedById` fields aren't updated. You can change this option in the geocode data integration rule settings.

- Geocode information is not visible on records. However, it can be viewed using the Salesforce API. Also, you can create custom fields using formulas to show geocode information fields on records.

- Status information associated with data integration rules can't be copied to or from a sandbox. For example, in your production org, you activate your `Geocodes for Lead Address` data integration rule, and geocode information is successfully added to all your existing leads. As a result, the status of the `Geocodes for Lead Address` data integration rule for each lead is In Sync. You can't copy this status information for records to your sandbox. To get status information in your sandbox, activate your data integration rules and process your records in your sandbox.

- Person accounts are not currently supported.

SEE ALSO:

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Set Up Geocode Data Integration Rules

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

📝 **Note:** This information applies to Data Integration and not to Data.com Clean.

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

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

2. Click the name of the geocode data integration rule you want to edit. See Standard Data Integration Rules.

3. Review your data integration rule settings.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up and activate data integration rules:
- "Customize Application"

a. To change the settings, click **Edit Rule Settings**, make your changes, and then click **Save**.
   If **Update all records after this rule is activated or saved** is selected, geocodes are added to all existing records. New records get geocodes when they're saved. Existing geocode values are overwritten.

b. To change the field mapping, click **Edit Field Mapping**.

c. To activate a rule, click **Activate**. To deactivate it, click **Deactivate**

4. To return to the list of geocode rules, click **Back to List: Data Integration Rules**.

5. Repeat this process for the other geocode data integration rules.

6. In Salesforce Classic, if you want to check the update status of the geocode data integration rules, add the Data Integration Rules related list to the page layout for accounts, contacts, and leads. (This step isn't necessary in Lightning Experience.)

SEE ALSO:

Considerations for Setting Up Geocode Data Integration Rules

Update a Record with Geocode Information

Verify That Geocodes Were Added to Records

Geocode Fields

Guidelines for Setting Up Geocode Data Integration Rules

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

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

- By default, geocode rules don't update last-modified information when they update a record. If you have automated processes that depend on the last-modified information, they don't run when a geocode rule does an update. If you want a geocode rule to update the last-modified information, edit the rule's settings and deselect **Leave last-modified information unchanged**, then click **Save**.

- To let your users manually add geocodes to records using geocode rules, set field-level security for the geocode and accuracy fields.

SEE ALSO:

Update a Record with Geocode Information

Geocode data integration rules add geocodes for addresses on your accounts, contacts, and leads. From the record's detail page, you can check its update status or manually update the record.

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

1. Open the record that you're checking.

2. Review the update status for the record's geocode data integration rule. For example, if you're checking the billing address for the account, you review the update status for the Geocodes for Account Billing Address data integration rule. In Salesforce Classic, the status is located in the Data Integration Rules related list. (If you can't find the related list, ask your Salesforce admin to add it to your page layout.) In Lightning Experience, click the **Check Integration Status** quick action.

3. To manually update the record, click **Update** for the geocode data integration rule.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To update accounts with a geocode data integration rule:
- "Edit" on accounts

To update contacts with a geocode data integration rule:
- "Edit" on contacts

To update leads with a geocode data integration rule:
- "Edit" on leads

If your record matches a record in the geocode data service, values for the geocode information fields are added, and the existing geocode values are overwritten. The status for the data integration rule is updated. If you can't manually update the record, ask your admin to set field-level security for the geocode latitude, longitude, and accuracy fields so that you can update these fields.

📝 **Note:** If you change the address on a record, the status for the data integration rule is set to Not Compared until the record is updated again. Fortunately, with geocode data integration rules, the record is automatically updated again almost immediately!

Verify That Geocodes Were Added to Records

Because geocode fields are not typically visible on a record, you need to complete a few steps to verify that a Data.com data integration rule added the geocodes.

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

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

1. Review the geocode rule update status.

   a. Open a record.

   b. Review the geocode rule update status, which is listed in the Data Integration Rules section.

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

2. Make sure that there are values in the geocode fields using the Salesforce API.

   a. Get the value of the `Id` field for a record.

   b. Using the `Id`, query the address fields and geocode fields. (Alternatively, you can query all records or the first X number of records for an object.)

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

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

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

SEE ALSO:

Geocode Fields

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

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

Accuracy Values

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

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

Accuracy Value	Description
Unknown	No match for the address was found

Automatically Update Accounts and Leads with Critical Company Information

Make it easier for your sales teams to pursue the most promising leads, segment accounts, plan territories and campaigns, and understand customers better. Company Info rules provide access to over 100 fields of company, industry, and financial information from Dun & Bradstreet using the same fields as Data.com Clean.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

IN THIS SECTION:

Considerations for Setting Up Company Info Data Integration Rules

Review considerations for using Data.com data integration rules to add company information to Salesforce accounts and leads automatically.

Set Up Company Info Data Integration Rules

Using the Data.com Company Info data integration rules, you can add valuable company information, like annual revenue, D-U-N-S number, and number of employees to all your existing and new accounts and leads.

Guidelines for Setting Up Company Info Data Integration Rules

Follow important guidelines when using Data.com data integration rules to automatically update your accounts and leads.

Check the Data Integration Status of Records in Lightning Experience

Check whether an individual record has been processed with a Company Info data integration rule. To test the rule, update a record manually. With data integration rules, your records are automatically updated, so manually updating a record isn't necessary.

Check the Data Integration Status of Records in Salesforce Classic

You can check whether an individual record has been processed by a data integration rule. You can also update a record manually.

Considerations for Setting Up Company Info Data Integration Rules

Review considerations for using Data.com data integration rules to add company information to Salesforce accounts and leads automatically.

Recommendation to Use AppExchange Package Instead of Assessment Option

The Company Info for Accounts rule provides an option to update your data or generate a read-only assessment. The assessment option applies custom matching criteria to Data.com data assessments. However, the assessment option can produce unexpected results for Data.com Clean customers. If you're a Clean customer, we recommend that you use the AppExchange package Data.com Clean Reports instead.

Company Info Rules and Data.com Clean

Status Fields

Company Info data integration rules and Data.com Clean use different status fields.

- Company Info rules use the Data Integration Status field in the Integration Rule Info object.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Company Info for Accounts and Company Info for Leads rules require a Data.com Premium Clean license.

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

- Data.com Clean uses the Clean Status field in the Account or Lead object.

Conflicts Between Company Info Rules and Data.com Clean

Because Company Info rules and Clean jobs can run at different times, the status fields can contain different values. Workflow rules or triggers that depend on a status field can work incorrectly.

For example, the Company Info for Accounts data integration rule updates fields after a user adds an account. The value of the Data Integration Status field is In Sync. However, if the scheduled Clean job for accounts hasn't run yet, the value of the Clean Status field is still Not Compared.

Clean Button and Data Integration Related List (Salesforce Classic)

Avoid adding the Clean button, Clean Status field and Data Integration Rules related list to the same page layout. The Clean button and Clean Status field are for Data.com Clean, but the Data Integration Rules related list is for data integration rules. Having all these options on the same page can confuse your users.

Company Info Rules and Updates

Company Info rules can modify one or more records, which in turn can set off triggers, workflows, and push notifications. Review your triggers, workflows, and push notifications before activating a rule.

When users edit one of a special set of fields for a record, data integration rules for the object type run automatically. The rules don't always run immediately, so a user who tries to edit a record can encounter a conflict. The user can edit fields, but can't save the record because it's locked by the rule.

The fields that trigger rules automatically are listed in the topic "Standard Data Integration Rules." For the Company Info for Leads rule, only the fields listed under "Matching Fields" are affected. For the Company Info for Accounts rule, all the fields listed under "Matching Fields" and "Fields Updated" are affected.

Company Info For Leads Location Matching

If a lead contains a value for the Country field, the Company Info for Leads rule adds company information for the domestic headquarters in that country. If the lead doesn't contain a value for Country, the rule adds global headquarters information.

Company Info For Accounts Location Matching

Company Info for Accounts matches an account record based on the account's location.

Separate Field Mapping Settings for Rules

The field mapping selections in **Setup** > **Data.com Administration** > **Field Mapping** don't affect field mapping for company info rules. Each rule has its own customizable field mapping settings.

SEE ALSO:

Set Up Company Info Data Integration Rules

Set Up Company Info Data Integration Rules

Using the Data.com Company Info data integration rules, you can add valuable company information, like annual revenue, D-U-N-S number, and number of employees to all your existing and new accounts and leads.

> **Note:** This information applies to Data Integration and not to Data.com Clean.

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

2. Click the Company Info rule you want to set up. A summary of the rule appears.

3. Review the rule.

   a. To change the settings, click **Edit Rule Settings**.

   b. To change the field mapping, click **Edit Field Mapping**.

   c. To activate it, click **Activate**. To de-activate it, click **Deactivate**.

   If you chose the option to clean all records when the rule is activated or saved, Salesforce immediately checks for new records and whether new data is available for existing records. New data is added only to blank fields—Salesforce never overwrites your data.

4. To add company information to all existing accounts or leads, select **Update all records after this rule is activated or saved**.

5. Save the rule.

6. Activate the rule.

7. In Salesforce Classic only, to allow users to check the status of a Company Info rule, add the Data Integration Rules related list to the page layout for accounts or leads.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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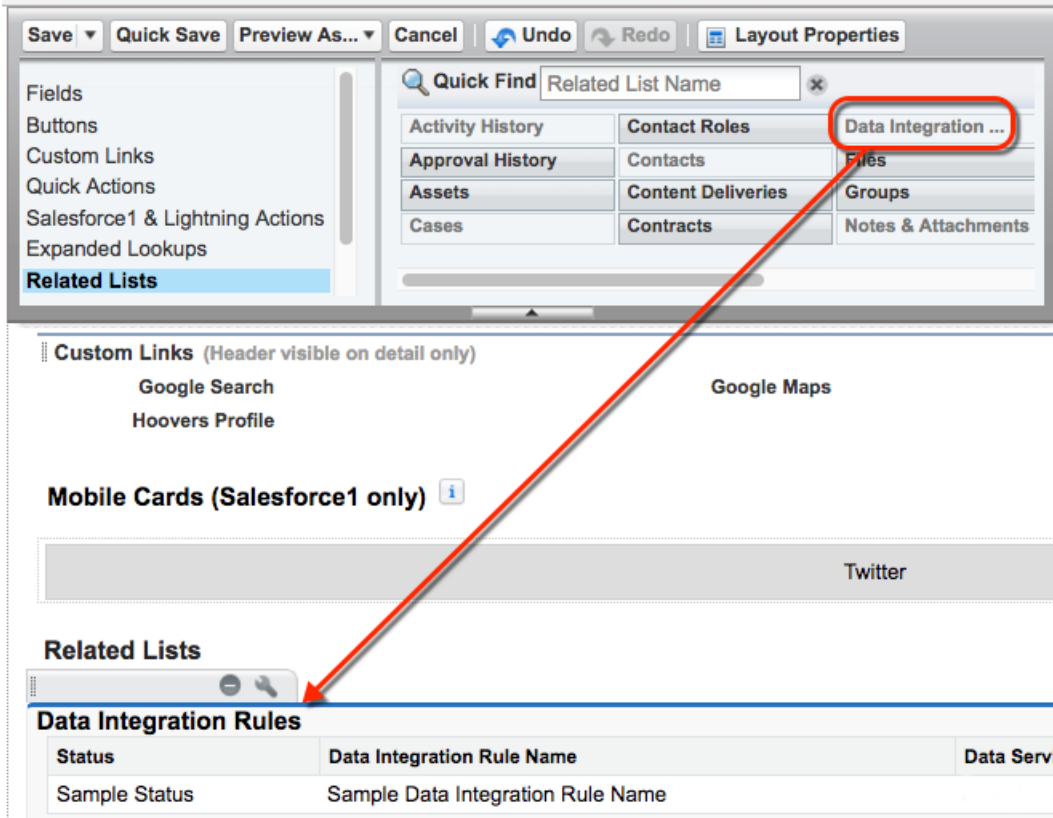
USER PERMISSIONS

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

To edit page layouts:
- "Customize Application"

SEE ALSO:

> [Considerations for Setting Up Company Info Data Integration Rules](#)
>
> [Set Up Data Integration Rules](#)
>
> [Check the Data Integration Status of Records in Salesforce Classic](#)

Guidelines for Setting Up Company Info Data Integration Rules

Follow important guidelines when using Data.com data integration rules to automatically update your accounts and leads.

Adjustments for Salesforce Classic Users

To allow Salesforce Classic users to check a record's update status and update it manually, adjust the lead or account page layout. Add the Data Integration Rules related list to the layout.

Access for Users Who Update Records Manually

Access to D&B Company Object

Make sure that users have "Read" and "Create" access to the D&B Company object. When a user updates a record, the rule creates an associated D&B Company record (if the record doesn't exist).

<div style="border-left: 3px solid #ccc; padding-left: 1em;">

EDITIONS

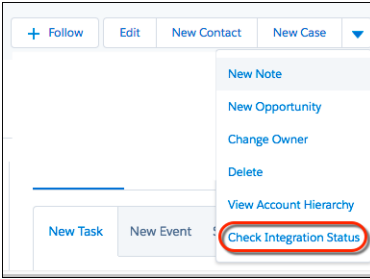Available in: Salesforce Classic and Lightning Experience

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

</div>

Access to Account Fields

For the Company Info for Accounts rule, adjust field-level security to give users access to the account fields containing data provided by the rule.

Account Name	Description	Phone
Account Site	Employees	SIC Code
Annual Revenue	Fax	SIC Description
Billing Address	Industry	Ticker Symbol
Company D-U-N-S Number	NAICS Code	Tradestyle
D&B Company	NAICS Description	Year Started
Data.com Key	Ownership	Website

Access to Lead Fields

For the Company Info for Leads rule, adjust field-level security to give users access to the following fields on leads.

- Annual Revenue
- D&B Company
- Company D-U-N-S Number
- Industry
- No. of Employees

Note: In Professional Edition, you control field-level security using page layouts.

SEE ALSO:

Check the Data Integration Status of Records in Lightning Experience

Check whether an individual record has been processed with a Company Info data integration rule. To test the rule, update a record manually. With data integration rules, your records are automatically updated, so manually updating a record isn't necessary.

Available in: Lightning Experience

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

USER PERMISSIONS

To clean accounts and leads:
- "Edit" on accounts and leads

1. Open the account or lead that you want to check.

2. In the action menu, click **Check Integration Status**.

3. Click **Clean**.

The window displays the update status before and after updating.

If an account or lead record matches a record in the data service, any blank fields are filled in automatically. Company Info rules don't overwrite data on your records. If the new data is different from your existing data, you can manually review and select the data you want. The status for the data integration rule is updated.

If you change one or more fields that a rule uses to match or update a record, the status is set to Not Compared until the record is saved and updated again.

> 📝 **Note:** On an account, if you update the Company D-U-N-S Number field value while updating manually, delete the D&B Company field value. Otherwise, Data.com can't add updated values for those two fields or link the correct D&B Company record to the account.

Check the Data Integration Status of Records in Salesforce Classic

You can check whether an individual record has been processed by a data integration rule. You can also update a record manually.

1. Open the account, contact, or lead that you want to check.

   If you don't see this related list, ask your Salesforce admin to add it to the page.

2. Click **Update**.

If an account, contact, or lead record matches a record in the data service, any blank fields are filled in automatically. Data integration rules don't overwrite data on your records. If the new data is different from your existing data, you can manually review and select the data you want. The status is updated.

If you change one or more fields that a rule uses to match or update a record, the status is set to Not Compared until the record is saved and updated again.

Note: On an account, if you update the Company D-U-N-S Number field value while updating manually, delete the D&B Company field value. Otherwise, Data Integration can't add updated values for those two fields or link the correct D&B Company record to the account.

SEE ALSO:

Standard Data Integration Rules

Guidelines for Determining How Well Data Integration Rules Are Working

Do you want to know how well Data Integration is working for your organization? Check out the Data Integration Metrics page, which shows the match rate for your data integration rules. You see the percentage of your records that matched a record in the data service. When your record matches, the data service can update it with the latest data.

📝 **Note:** This information applies to Data Integration and not to Data.com Clean.

- The **Errors** column shows the number of errors that occurred when processing records. An error occurs if a processed record can't be updated due to a trigger, workflow rule, duplicate rule, or validation rule. Click the number of errors to download a file that includes the ID of each record with an error and the associated error message. Only the most recent error for a record is available. The **Errors** column includes a maximum of 10,000 errors per data integration rule.

- No data is displayed for data integration rules that were activated in the last 24 hours.

Standard Data Integration Rules

Key details about the standard data integration rules include how each rule works and the fields it affects.

📝 **Note:** You can use the Company Info for Accounts data integration rule in assessment mode without having a Data.com license

Default Name	Data Service	Object	How Fields Are Updated	Matching Fields	Fields Updated
`Geocodes for Account Billing Address`	Data.com Geo	Account	Overwrite	`Billing Address`	• BillingLatitude • BillingLongitude • BillingGeocodeAccuracy Latitude, longitude, and accuracy are not visible on records.
`Geocodes for Account Shipping Address`	Data.com Geo	Account	Overwrite	`Shipping Address`	• ShippingLatitude • ShippingLongitude • ShippingGeocodeAccuracy Latitude, longitude, and accuracy are not visible on records.

Default Name	Data Service	Object	How Fields Are Updated	Matching Fields	Fields Updated
`Geocodes for Contact Mailing Address`	Data.com Geo	Contact	Overwrite	`Mailing Address`	• ~~`MailingLatitude`~~ • ~~`MailingLongitude`~~ • ~~`MailingGeocodeAccuracy`~~ Latitude, longitude, and accuracy are not visible on records.
`Geocodes for Lead Address`	Data.com Geo	Lead	Overwrite	`Address`	• `Latitude` • `Longitude` • ~~`GeocodeAccuracy`~~ Latitude, longitude, and accuracy are not visible on records.
`Company Info for Leads`	Data.com Companies for Leads	Lead	Blanks are filled in. Records with differences are flagged. Flagged records require manual review.	• `Company` • `Email` • `Address` • `Company D-U-N-S Number` • `Website`	• `Annual Revenue (US Dollars)` • `Company D-U-N-S Number` • `D&B Company` • `No. of Employees` • `Industry`
`Company Info for Accounts`	Data.com Companies	Account	The rule includes options to generate a read-only assessment or update records with new data. If you choose the option to update records, blanks are filled in and records with differences are flagged. Flagged records require manual review.	• `D-U-N-S Number` • `Name` • `Phone` • `Billing Address` • `Website`	• `Account Name` • `D-U-N-S Number` • `D&B Company` • `Employees` • `Annual Revenue` • `Ticker Symbol` • `Website` • `Industry` • `Ownership`

Default Name	Data Service	Object	How Fields Are Updated	Matching Fields	Fields Updated
					• `Billing Address` • `Phone` • `Fax` • `Account Site` • `Tradestyle` • `Year Started` • `SIC Code` • `SIC Description` • `NAICS Code` • `NAICS Description` • `Description`

SEE ALSO:

Set Up Data Integration Rules

Data Integration Rules

Set Up Company Info Data Integration Rules

Statuses for Data Integration

If you've activated data integration rules, you see an update status on records. This status indicates how the record's data compares with the data in the rule's data service.

Clean Status	Definition	API Value
⚠ `Not Compared`	The Salesforce record has not been compared with the data service.	`Pending`
✅ `In Sync`	The Salesforce record matches a record in the data service, and the fields to be updated have identical values.	`InSync`
✅ `Reviewed`	The Salesforce record matches a record in the data service, but not all values from the matching record were accepted. Only values for fields to be updated are used to determine the status.	`Reviewed`
⚠ `Different`	The Salesforce record matches a record in the data service, but the fields to be	`Different`

Clean Status	Definition	API Value
	updated have different values and the differences have not yet been reviewed.	
🚫 Not Found	The Salesforce record has no similar records in the data service record.	NotFound
🚫 Skipped	The Salesforce record could not be matched or updated due to a validation or trigger error.	Skipped

Report on Records with a Specific Data.com Clean Status

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

📝 **Note:** This information applies to Data.com Clean and not to Data Integration.

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

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

Let's create a Contacts by Clean Status report.

1. Make sure your organization has a custom report type that links the Contact object to the Contact Clean Info object. Also check that fields from both objects are available to report on.

2. Create your report: click the Reports tab, then click **New Report**.

3. Select **Contacts by Clean Status** as the report type.

4. Click **Create**.

5. From the parent object, Contacts, select the fields you want to report on. For example, choose:
   - `Contact ID`
   - `Clean Status`
   - `Full Name`
   - `Mailing Address`
   - `Phone`
   - `Email`

6. From the related object, Contact Clean Info, select fields that correspond to the Contact object fields. For contact clean info, choose:
   - `Contact Clean Info ID`
   - `First Name`
   - `Last Name`
   - `Address`

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

USER PERMISSIONS

To create, edit, and delete reports:
- "Create and Customize Reports"

  AND

  "Report Builder"

- `Phone`
- `Email`
- `Last Match Date`

7. Add a field filter to the report: For the field, select **Clean Status**. For the operator, select `equals`, and for the value, select **Different**.

8. Define the remaining fields.

9. Save the report and run it.

10. Examine the report to see if you can identify patterns in your data that cause certain records to have a clean status of `Different`.

SEE ALSO:

Determine How Well Data.com Clean Is Working

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

> **Note:** This information applies to Data.com Clean and not to Data Integration.

1. From Setup, enter `Metrics` in the `Quick Find` box, then select **Metrics & Analytics** under the Clean section.

2. To find out when the last calculation occurred, check the `Last Calculated` field above the table.

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

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

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

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

USER PERMISSIONS

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

Column	Definition
Processed	The number of each type of Salesforce record (accounts, contacts, or leads) processed by Data.com Clean.
Matched	The number of each type of processed Salesforce record (accounts, contacts, or leads) that match with Data.com records.
Updated	The number of each type of processed Salesforce record (accounts, contacts, or leads) that have been updated.

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

SEE ALSO:

Guidelines for Determining How Well Data Integration Rules Are Working

How Does Data.com Clean Match Your Records?

Guidelines for Selecting an Account Matching Service

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

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

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

2. From the Force.com app menu, select `Data.com Assessments` to open the Data Assessment app.

3. Click the Data.com Assessment tab and define your assessment preferences.

4. Click **Start My Assessment**.
   We tell you how long we expect the assessment to take. The completion calculation is based on 15 records per second, and we round up to the nearest hour. So if you have 200,000 accounts, for example, your assessment takes about 3 hours and 45 minutes to complete. We estimate it at 4 hours.

5. After the assessment is complete, from the Force.com app menu, select `Data.com Assessments`.

6. Click the Data.com Assessment tab, then click the Assessments tab.

7. Click **View Assessments** next to the assessment you want.

8. Click through the assessment tabs. Here's what you find.

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To install packages:
- "Download AppExchange Packages"

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

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

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

Find Out How Clean Your Accounts Are

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

Note: This information applies to Data.com Clean and not to Data Integration.

Note: This information applies to Data.com Clean and not to Data Integration.

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

1. Click the Dashboards tab, then select Data.com Analytics. Run the Accounts by Clean Status report.
   If your clean jobs have run successfully, your accounts are grouped by their clean status values.

2. On the report, find any Salesforce records with a clean status of `Different`. Open several records and click **Clean** to look at the differences.

3. Repeat the comparison process with records that have a clean status of `Not Found`.

SEE ALSO:
How Does Data.com Clean Match Your Records?

EDITIONS

Available in: Salesforce Classic

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

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

USER PERMISSIONS

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

Install and Implement Data.com Reports AppExchange Packages

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

Available in: Salesforce ClassicSalesforce Classic and Lightning Experience

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

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

> 📝 **Note:** These packages are designed for Data.com Clean and Data.com Prospector. If you're using Data Integration, write your own custom reports.

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

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

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

Page Layout	Fields
Account	`Sourced from Data.com`

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

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

Get an Assessment of Your Account Data

Start making informed decisions about the quality of your account data—request a Data.com data assessment. The assessment summarizes overall data quality for your accounts and provides an analysis of key account fields. It doesn't change data in your org. Data assessments are available for orgs in the United States and Canada. For current Data.com Clean customers, we recommend using the AppExchange package Data.com Clean Reports instead.

IN THIS SECTION:

1. Request an Account Data Assessment

   Request your account data assessment by activating the Company Info for Accounts data integration rule in assessment mode.

2. How to Read Your Account Data Assessment

   A data assessment provides an overall data health score for your accounts. It summarizes what account records Data.com can match and update in your org, and it includes customer segmentation charts by industry, geography, employee count, and annual revenue. Data assessments are available for Salesforce orgs in the United States and Canada. This feature is only available in Lightning Experience.

Request an Account Data Assessment

Request your account data assessment by activating the Company Info for Accounts data integration rule in assessment mode.

📝 **Note:** If you're a Data.com Clean customer and you use Clean jobs, use the free AppExchange package Data.com Clean Reports to see how well Clean is working for you.

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

2. In the list of rules, click **Company Info for Accounts**.

3. Click **Edit Rule Settings**.

4. Click **Generate a read-only data assessment**, then click **Save**.

   Saving or activating the rule requires agreeing to the terms of the data assessment agreement.

5. If the rule is inactive, activate it by clicking **Activate**.
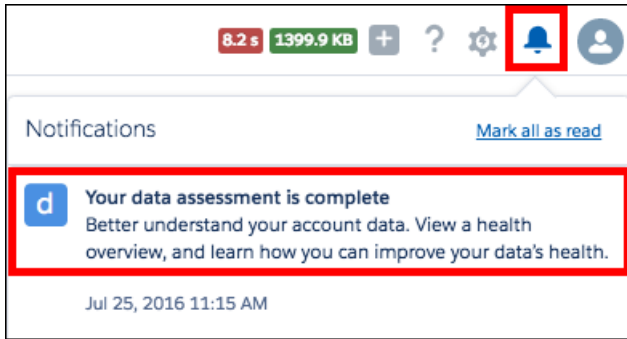
   The Current Status field now shows that the rule is active in Assessment mode.

⊘ **Important:** If your org has 100 or fewer accounts, no notification is sent when the assessment is ready.
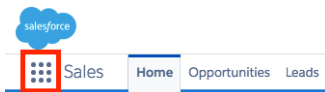
   If your org has more than 100 accounts, when your assessment is ready, Salesforce notifies you by email and in Lightning Experience.

The assessment can take 24 hours or more, depending on the size of your org. When it's ready, view it at any time by going to the App Launcher in Lightning Experience and selecting the Data Assessment app.

To share the assessment with others in your org, give them the Data Assessment permission.

SEE ALSO:

How to Read Your Account Data Assessment

A data assessment provides an overall data health score for your accounts. It summarizes what account records Data.com can match and update in your org, and it includes customer segmentation charts by industry, geography, employee count, and annual revenue. Data assessments are available for Salesforce orgs in the United States and Canada. This feature is only available in Lightning Experience.

EDITIONS

Available in Lightning Experience in: **Professional**, **Enterprise**, **Performance**, **Unlimited** Editions

Data Quality
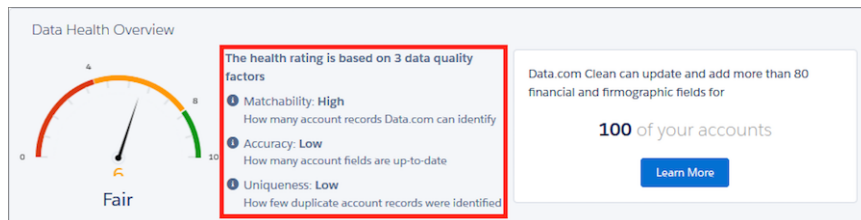
Your data's health score is calculated using three factors.

Matchability

Matchability reflects how easy it is to keep your CRM records up-to-date and complete using Dun & Bradstreet data. Highly matchable CRM records generally have good fill rates for key identifiers, such as address fields and company website. A higher rating for matchability improves your overall data health rating.

Accuracy

Accuracy is a measure of the percentage of your account records that are complete and up-to-date when compared to the Dun & Bradstreet data set. If valuable marketing and sales data, such as firmographics and financials, is incomplete or out of date, the record is less useful. A higher rating for accuracy improves your overall data health rating.

Uniqueness

Uniqueness is based on the number of duplicate accounts that were identified from the matched records. The presence of duplicates affects your ability to find and report on data, reducing employee productivity and decreasing customer satisfaction. A higher rating for uniqueness improves your overall data health rating.

Match Analysis
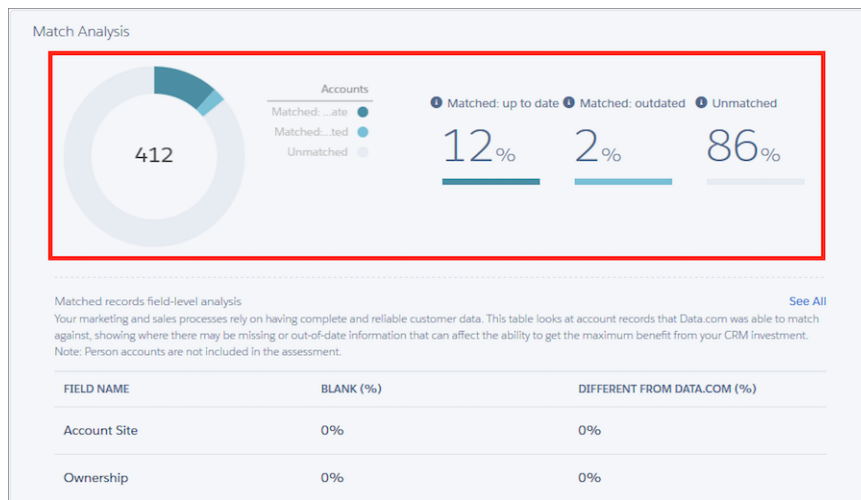
The match analysis summarizes how many of your records can be matched to records in the Dun & Bradstreet data set. It also shows how up-to-date the field values in your records are.

Matched Up-to-Date

Percentage of your account records in which all field values exactly match the field values in the corresponding Dun & Bradstreet record.

Matched Outdated

Percentage of your account records that Data.com matched to a corresponding Dun & Bradstreet record, but that have field values that differ from the Dun & Bradstreet record.

Unmatched

Percentage of your account records that Data.com couldn't match to a record in the Dun & Bradstreet data set. If your unmatched record percentage seems high, it's possible that you aren't using the standard fields we match on. To request a custom assessment of your data, contact your Salesforce account manager.

Customer Segmentation

The customer segmentation charts give you detailed, graphical breakdowns of your account data. The charts show the fields for which Data.com can potentially provide more up-to-date and accurate data.

Industry

A breakdown of accounts in the top five industries, as identified by the two-digit Standard Industrial Classification (SIC) code.

Geography

A breakdown of accounts in a specific geographic region, according to companies' Dun & Bradstreet primary billing address.

Employee Count

A breakdown of the number of employees at the companies in your accounts. The count is based on the Dun & Bradstreet data for those companies, not your Salesforce account data.

Revenue

A breakdown of annual revenue for your accounts, based on Dun & Bradstreet annual sales volumes.

SEE ALSO:

Request an Account Data Assessment

Setting Options for Selling

Customize Opportunities and Products

Get the most out of opportunities and products by setting up these additional features.

IN THIS SECTION:

Enable and Configure Similar Opportunities

Allow users to find Closed/Won opportunities that match the attributes of an opportunity they're currently working on, so they can quickly access information that might help them close their open deals.

Make It Easy to Add Products to Opportunities

Set up Salesforce to prompt your users to add products when they create an opportunity. When you select `Prompt users to add products to opportunities` in Opportunity Settings, the label for the save button in a new opportunity record is "Save & Add Product."

Enable Opportunity Update Reminders

Updated and accurate opportunities drive precise forecasts. Enabling update reminders lets managers send their direct reports automated emails with a report on the team's open opportunities.

Activate and Deactivate Product Prices with Their Products Simultaneously

Set up Salesforce so that when you activate or deactivate a product, all related prices for that product are activated or deactivated at the same time.

Restrict Price and Quantity Editing on Opportunity Products

Control whether users can update the `Price` and `Quantity` fields on opportunities.

Enable Product Schedules

Create default revenue and quantity schedules for products that are delivered or paid for over a period of time. In addition, administrators can enable schedule settings that allow users to create schedules for individual products on opportunities.

Using Product Families

Activate Big Deal Alerts

Your organization can use alerts that automatically send an email notification for opportunities with large amounts. You can activate one opportunity alert for your organization. The alert message resembles the opportunity detail page including the page layout and language from a selected user.

Customize Big Deal Alerts

Your organization can use alerts that automatically send an email notification for opportunities with large amounts. Customize this alert to send an email when an opportunity reaches a threshold.

Enable and Configure Similar Opportunities

Allow users to find Closed/Won opportunities that match the attributes of an opportunity they're currently working on, so they can quickly access information that might help them close their open deals.

> ✏️ **Note:**
>
> - Searches are constructed as *OR* statements. Therefore, Closed/Won opportunities need to match only one criteria to be considered similar. For best search results, include multiple search terms.
>
> - When deciding which opportunity fields to display on the Similar Opportunities related list, be aware that users will see all fields that are displayed, regardless of sharing rules and user permissions.

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

2. Click **Edit**.

3. Select `Enable Similar Opportunities`.

4. Select the fields or related lists that you want Similar Opportunities searches to match against, and then click **Add**.

5. Select the fields to display in the Similar Opportunities related list.

6. Click **Save**.

7. Make sure the Similar Opportunities related list is added to the opportunity page layout.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions for organizations activated after Summer '09

USER PERMISSIONS

To enable and configure similar opportunities:
- "Customize Application"

Make It Easy to Add Products to Opportunities

Set up Salesforce to prompt your users to add products when they create an opportunity. When you select `Prompt users to add products to opportunities` in Opportunity Settings, the label for the save button in a new opportunity record is "Save & Add Product."

EDITIONS

Available in: Salesforce Classic

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

Enable Opportunity Update Reminders

Updated and accurate opportunities drive precise forecasts. Enabling update reminders lets managers send their direct reports automated emails with a report on the team's open opportunities.

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

2. Click **Edit**.

3. Select `Enable Update Reminders for My Organization`.

4. Optionally, select `Automatically Activate Reminders for Users with Direct Reports` to schedule opportunity update reminders for all users who have direct reports.

5. Click **Save**.

6. If you didn't automatically activate all users with direct reports, then select which users you want to be able to schedule opportunity update reminders. Any user that has direct reports can be added.

7. Click **Activate**.

8. Let those users know they can start scheduling update reminders for their direct reports.

> 📝 Note: If an account owner is allowed to send opportunity update reminders, then all partner and customer portal users that are assigned as Executives to the account will receive the reminders, even if they don't have access to the opportunity. To avoid reminders being sent to these users, remove them from the Executive role.

Activate and Deactivate Product Prices with Their Products Simultaneously

Set up Salesforce so that when you activate or deactivate a product, all related prices for that product are activated or deactivated at the same time.

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

2. Select `When changing active flag on a product record`.

3. Save your changes.

SEE ALSO:

Restrict Price and Quantity Editing on Opportunity Products

Restrict Price and Quantity Editing on Opportunity Products

Control whether users can update the `Price` and `Quantity` fields on opportunities.

Although `Sales Price` and `Quantity` fields are required, you can remove them from the page layout and they will be populated with a default value. Users will no longer see the fields or be able to add data to them.

To ensure that opportunity products use the price from the associated price book, remove the `Sales Price` field from the opportunity products page layout.

To use a quantity of one for all opportunity products, remove the `Quantity` field from the opportunity products page layout.

> 📝 **Note:** If you cannot remove these fields from the page layout, contact Salesforce to enable this option.

SEE ALSO:

Activate and Deactivate Product Prices with Their Products Simultaneously

Enable Product Schedules

Create default revenue and quantity schedules for products that are delivered or paid for over a period of time. In addition, administrators can enable schedule settings that allow users to create schedules for individual products on opportunities.

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

2. Select the appropriate checkboxes to enable quantity and revenue schedules for your organization. Note that disabling a schedule type automatically deletes all existing schedule information from products.

   For a definition of each schedule type, see Products, Price Books, and Schedules Overview.

3. For each schedule type you enable, select whether to automatically enable that schedule type for every product in your price books. This option automatically selects the `Quantity Scheduling Enabled` or `Revenue Scheduling Enabled` checkboxes on every product in your price books.

4. Click **Save**.

For greater control of schedules on a product-by-product basis, administrators can also determine which schedule types users can establish for each product.

> 📝 **Note:** Enabling or disabling schedules does not affect archived products.
>
> If schedules are referenced in Apex, only one of the schedule types (quantity or revenue) can be disabled. For example, if Apex references the schedule object (represented as `OpportunityLineItemSchedule` in the code), one of the schedule types can be disabled, but not both.

Using Product Families

Use the `Product Family` picklist to categorize your products. For example, if your company sells both hardware and software, you can create two product families: Hardware and Software.

If your organization has customizable forecasting, your users can have a different quota for hardware sales and software sales. Users can also view forecasts for opportunities with hardware products separate from opportunities that include software products.

To begin using product families:

- Customize the `Product Family` picklist to include the different categories of products you sell.
- For each product in your price books, edit the product and select the appropriate `Product Family` value.
- If your organization has customizable forecasting, set a different quota for each product family for your users.
- If your organization has customizable forecasting, consider changing your forecast settings to display a particular forecast family value by default when your users click the Forecasts tab.

Activate Big Deal Alerts

Your organization can use alerts that automatically send an email notification for opportunities with large amounts. You can activate one opportunity alert for your organization. The alert message resembles the opportunity detail page including the page layout and language from a selected user.

Before you begin, you may want to decide which user has the page layout and language settings that you would like included in all alerts. This user must also have the "View All Data" permission.

1. From Setup, enter *Big Deal Alert* in the `Quick Find` box, then select **Big Deal Alert**.

2. Enter a name for the alert.

3. Enter a `Trigger Probability` and `Trigger Amount` in the corporate currency. An opportunity alert is triggered for opportunities with this probability and amount or greater. The alert triggers only for those opportunities that meet both the trigger probability and trigger amount threshold settings.

    Note: An opportunity can trigger a big deal alert even if it is in a currency that is different from the corporate currency. The `Amount` on an opportunity is converted to corporate currency and compared to the `Trigger Amount`. If you are using advanced currency management, dated exchange rates will be used.

4. Check the `Active` box if you would like to activate the new alert immediately after you save.

5. Enter the `From Email Name`.

6. Enter the `From Email Address`.

    Note: The From address must be either one of your verified organization-wide email addresses or the email address listed in your Salesforce profile.

7. Select a user that provides the appropriate opportunity page layout, language, and currency settings for the content of the emails. This user must have the "View All Data" permission.

    For organizations that use multiple currencies, all alerts include the amount in the currency of the opportunity. If the opportunity currency is different than the currency of the user selected in this step, both currencies are included in the email.

Enter a list of email recipients separated by commas. You can also include CC: and BCC: recipients but all must be valid email addresses.

The BCC: field is not available if your organization has enabled compliance BCC emails.

8. Check the Notify Opportunity Owner box if you would like to include the owner of the opportunity in the alert emails.

9. Click **Save**.

> Note: An opportunity alert sends a notification the first time an opportunity reaches the threshold. So, an opportunity that reaches the threshold with 90% probability will not trigger additional alerts if the probability subsequently goes higher. However, an opportunity that already triggered an alert and then fell below the threshold can trigger a second alert if it crosses that threshold again.
>
> When working remotely in Connect Offline, you can make changes to opportunities that trigger alerts. These alert messages will be sent when you update your data.

SEE ALSO:

Customize Big Deal Alerts

Customize Big Deal Alerts

Your organization can use alerts that automatically send an email notification for opportunities with large amounts. Customize this alert to send an email when an opportunity reaches a threshold.

Your threshold consists of an opportunity amount and probability. For example, you can send an email to your team when an opportunity of $500,000 has reached a probability of 90%.

SEE ALSO:

Activate Big Deal Alerts

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To activate big deal alerts:
• "Customize Application"

Customize Sales Teams

Managing Opportunity Teams

Make it easy for your sales reps to collaborate on opportunities.

IN THIS SECTION:

1. Enable Team Selling

   To make it easy for your sales reps to collaborate on selling opportunities, enable opportunity teams in Salesforce.

2. Considerations for Customizing Opportunity Teams

   Make opportunity teams work better for your business by customizing opportunity team roles, page layouts, and more. Before you do, consider these key points.

3. Customize Opportunity Team Roles

   Every opportunity team member has a role in that opportunity, such as Account Manager or Sales Rep. To track the roles that team members play in your company, customize your opportunity team roles in Salesforce.

4. Considerations for Updating Team Members on Multiple Records

   Before you use a mass team reassignment wizard, consider a few key points.

5. Update Team Members on Multiple Records

   If your Salesforce org uses account teams or opportunity teams, keep your records up-to-date the easy way. Use the mass team reassignment wizards to add, remove, and replace team members on multiple records at the same time.

6. Considerations for Disabling Team Selling

   Before you disable team selling, consider the following key points.

Enable Team Selling

To make it easy for your sales reps to collaborate on selling opportunities, enable opportunity teams in Salesforce.

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

2. Define the settings as needed.

3. Save your changes.

Considerations for Customizing Opportunity Teams

Make opportunity teams work better for your business by customizing opportunity team roles, page layouts, and more. Before you do, consider these key points.

- Opportunity teams are available in Lightning Experience, but you must switch to Salesforce Classic to use some related features, such as Opportunity Splits. For more information, review the Lightning Experience limitations for Sales features.

- You can create a maximum of 50 custom fields for an opportunity team.

- If you delete a custom field, filters that use the custom field are also deleted, and the result of assignment or escalation rules that rely on the custom field's data can change.

- To display opportunity team member information on a parent page, you must link the team member and the parent. For example, to display team member information on the related account detail page, add a custom lookup field called Account to the Opportunity Team editor, and then set this field to the parent account for each opportunity team member.

- You can't create a lookup from an object, such as an account, to an opportunity team member.

- Validation rules and Apex triggers aren't supported when a user adds his or her default opportunity team on an opportunity.

Customize Opportunity Team Roles

Every opportunity team member has a role in that opportunity, such as Account Manager or Sales Rep. To track the roles that team members play in your company, customize your opportunity team roles in Salesforce.

⚠️ Warning:
- Leave the Opportunity Owner unchanged. It's needed for Opportunity Splits.
- Opportunity teams share roles with account teams. If you remove an opportunity team role, that role is no longer listed as an account team role.

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

2. Edit the picklist values for team roles as needed.

3. Save your changes.

4. To update a changed picklist value in all your files, enter `Replace Team Roles` in the `Quick Find` box, then select **Replace Team Role**.

Considerations for Updating Team Members on Multiple Records

Before you use a mass team reassignment wizard, consider a few key points.

- If you don't see the **Mass Reassign Account Teams** or **Mass Reassign Opportunity Teams** option in Setup, go to the Accounts or Opportunities page, and then click the option in the Tools section.

- If Opportunity Splits is enabled, and you remove a team member assigned to a split that must total 100%, the removed member's percentage transfers to the opportunity owner. You can't remove the opportunity owner.

- When you're selecting the team members to change in records:

    - For account teams, select the appropriate account, contact, case, and opportunity access.

    - For opportunity teams, select the appropriate opportunity access. Then complete any custom fields that have been defined and added to the opportunity team page layout.

Update Team Members on Multiple Records

If your Salesforce org uses account teams or opportunity teams, keep your records up-to-date the easy way. Use the mass team reassignment wizards to add, remove, and replace team members on multiple records at the same time.

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

    The Step 1 page of the wizard appears.

2. Complete the wizard as instructed.

3. Review the number of changed records, and then click **Done** to exit the wizard.

SEE ALSO:

Considerations for Customizing Opportunity Teams

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To mass update team members:
- "Use Team Reassignment Wizards"

Considerations for Disabling Team Selling

Before you disable team selling, consider the following key points.

- Disabling team selling permanently removes all opportunity teams from all opportunities and deletes default opportunity teams.

- If Opportunity Splits is enabled, you can't disable team selling.

- If team members are referenced in Apex, you can't disable team selling.

- Before you disable team selling, do the following.

    - Disable Opportunity Splits. This action permanently deletes all split data from your Salesforce org.

    - Delete all custom fields, custom buttons and links, page layouts, validation rules, workflow rules, and Apex triggers that you've added to opportunity teams.

    - Delete all custom reports that include opportunity team information.

    - Uninstall any Apex packages that use opportunity teams.

- To disable team selling:

    - You need the "Customize Application" permission.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Opportunity Splits and settings for opportunity teams available in: Salesforce Classic

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

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

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

SEE ALSO:

    Considerations for Customizing Opportunity Teams

    Considerations for Disabling Opportunity Splits

Managing Opportunity Splits

Make it easy for your sales reps to share opportunity revenue.

IN THIS SECTION:

1. Considerations for Enabling Opportunity Splits

   Before you enable Opportunity Splits, consider these key points.

2. Enable Opportunity Splits

   Make it easy for your sales reps to collaborate on opportunities and share opportunity revenue with team members.

3. Create Custom Opportunity Split Types

   To better reflect your business operations, create custom opportunity split types on opportunity currency fields. Create up to three types to use in addition to revenue and overlay splits. Then, specify whether each type always totals 100%.

4. Considerations for Removing Opportunity Split Types

   Typically, you *deactivate* an opportunity split type when you have five split types (the maximum) and you need another. Or you *delete* a seldom-used type to reduce storage. Before you deactivate or delete an opportunity split type, consider these key points.

5. Considerations for Editing Multi-Line Layouts for Opportunity Splits

   Before you customize the fields that Salesforce displays when sales reps edit opportunity splits, consider these key points.

6. Considerations for Disabling Opportunity Splits

   If your Salesforce org isn't using Opportunity Splits, you can disable the feature. Before you do so, consider these key points.

EDITIONS
Available in: Salesforce Classic
Available in: **Performance** and **Developer** Editions
Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

Considerations for Enabling Opportunity Splits

Before you enable Opportunity Splits, consider these key points.

General considerations

- You must enable team selling before you can enable Opportunity Splits.
- Enabling Opportunity Splits changes the opportunity records in your Salesforce org. Here's what happens.
  - A script temporarily disables triggers, workflows, and validation rules for opportunity team records, mass reassignment of opportunity team members, and mass transfer of accounts and opportunities.
  - The opportunity owner is included on each opportunity team. Because the Opportunity Owner role is essential for splits, you can't remove it.

EDITIONS
Available in: Salesforce Classic
Available in: **Performance** and **Developer** Editions
Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

- If you enable split types that total 100%, new opportunity split records include a default entry for the owner. This owner initially receives 100% of the split amount. (These additional records require more data storage. To see how this extra storage requirement affects your Salesforce org, search for "Monitoring Storage Resources" in the Salesforce Help.)

- You can have up to five split types, including inactive split types. To rename, temporarily deactivate, or permanently delete split types, return to the Opportunity Splits setup page, and then click **Edit Split Types**. Deleting split types deletes splits data. You can't delete the default split types.

- If **Let users add members to opportunity teams while editing splits** isn't selected, users must be added to an opportunity team before they can be added to an opportunity split.

Available time

Enabling Opportunity Splits starts a process that sets up splits on every opportunity in your Salesforce org. Depending on the number of opportunity records, this process can take hours. You can still work with Salesforce while the process is ongoing. Automated email notifications keep you up-to-date on the script's status. Consider running the process overnight.

Inactive currencies

If your Salesforce org has inactive currencies that have been active in the past, you probably have opportunity records that use those currencies. Those records are part of the split enablement process, but the currency's inactive status causes the process to fail. To help prevent a failure, or fix a failure that occurs:

- Make the inactive currency active during the splits enablement. (You can make it inactive again after the process is finished.)

- Delete the opportunities with the inactive currency. This solution works best when your Salesforce org has only a few opportunities with an inactive currency and you don't need them for reporting or historical purposes.

Inactive users

Similar to inactive currencies, if your Salesforce org has inactive users that worked with opportunities, you probably have opportunity records still owned by those users. The split enablement process accesses those records, but the users' inactive status causes the process to fail. To help prevent a failure, or fix a failure that occurs:

- Make the inactive users active during the splits enablement. (You can make them inactive again after the process is finished.)

- Delete all opportunities owned by inactive users. This solution works best when your Salesforce org has only a few opportunities owned by inactive users and you don't need them for reporting or historical purposes.

- Temporarily allow editing of inactive users in your Salesforce org.

  Note: Turning on editing of inactive users could alter archived data. If you are enabling this permission only to turn on opportunity splits, we recommend limiting who can use it, and turning it back off again when you're done.

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

  2. Select **Enable "Set Audit Fields upon Record Creation" and "Update Records with Inactive Owners" User Permissions** and save your changes.

  3. Enable **Update Records with Inactive Owners** for profiles or permission sets.

Mass operations in progress

If you're running a mass operation, such as Mass Transfer or Mass Reassign Team Member, enabling Opportunity Splits at the same time can cause the enablement to fail. Make sure that all mass operations are finished before you start to enable Opportunity Splits.

Enable Opportunity Splits

Make it easy for your sales reps to collaborate on opportunities and share opportunity revenue with team members.

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

2. Click **Set up Opportunity Splits**.

3. To better reflect your business process, do any of the following.

   - Rename or deactivate the default revenue and overlay splits, which are based on the `Opportunity - Amount` field.

   - Click **Add a new split type** to split another currency field and specify whether splits on that field must total 100%.

4. Save your changes.

5. Select the page layouts to display the Opportunity Splits related list.

6. To ensure that users with customized page layouts see the related list, select `Add to users' customized related lists`.

7. Save your changes.

8. Click **Let users add members to opportunity teams while editing splits** to enable quicker changes to those teams.

For information about letting sales reps include splits in forecasts, see Enable Forecast Types for Collaborative Forecasts.

SEE ALSO:

    Enable Team Selling

EDITIONS

Available in: Salesforce Classic

Available in: **Performance** and **Developer** Editions

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable opportunity splits:
- "Customize Application"

Create Custom Opportunity Split Types

To better reflect your business operations, create custom opportunity split types on opportunity currency fields. Create up to three types to use in addition to revenue and overlay splits. Then, specify whether each type always totals 100%.

> **Note:** You can split most currency fields created on opportunities, including custom currency fields and roll-up summary fields, but not formula currency fields.

1. Contact Salesforce to have custom split types enabled for your Salesforce org.

   Changes to opportunity split types are completed by a background process. You're notified by email when the process is finished. We recommend not editing splits on opportunities until changes are complete.

2. From Setup, enter `Opportunity Splits` in the `Quick Find` box, select **Settings**, and then click **Edit Split Types**.

3. Click **+ Add a new split type**.

4. Define the settings as needed.

5. Save your changes.

EDITIONS

Available in: Salesforce Classic

Available in: **Performance** and **Developer** Editions

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To create custom split types for opportunities:
- "Customize Application" and "Modify All Data"

Considerations for Removing Opportunity Split Types

Typically, you *deactivate* an opportunity split type when you have five split types (the maximum) and you need another. Or you *delete* a seldom-used type to reduce storage. Before you deactivate or delete an opportunity split type, consider these key points.

- Deactivating a split type removes it from the Salesforce interface while saving the underlying data. That way, you can reactivate it later.
- Deleting a split type permanently removes all related data.
- To deactivate or delete a split type:
  - You need the "Customize Application" permission.
  - Access Opportunity Splits Settings.
- If your Salesforce org contains many opportunities, the script that deletes split types can take several hours.

SEE ALSO:

Considerations for Editing Multi-Line Layouts for Opportunity Splits

Before you customize the fields that Salesforce displays when sales reps edit opportunity splits, consider these key points.

- To edit layouts, you need the "Customize Application" permission.
- You can't add rich text fields or multi-select picklists to the multi-line layout for opportunity splits.
- You edit rich text fields and multi-select picklists on the opportunity split detail page.

Considerations for Disabling Opportunity Splits

If your Salesforce org isn't using Opportunity Splits, you can disable the feature. Before you do so, consider these key points.

- Disabling Opportunity Splits is irreversible. You can't retrieve lost splits data.
- If you disable Opportunity Splits, here's what happens.
  - Splits on all opportunities in your org are deleted.
  - Split reports are deleted.
  - Custom reports that were built using split report templates still appear on the Reports tab, but you can't access them.
- To disable Opportunity Splits:
  - You need the "Customize Application" permission.
  - You access Opportunity Splits Settings.

- If your org contains many opportunities, the script that disables Opportunity Splits can take several hours to finish.

SEE ALSO:

Considerations for Disabling Team Selling

Considerations for Removing Opportunity Split Types

Customize Options for Leads

Set Up Lead Management

Help your sales teams track prospects and build a strong pipeline of opportunities. Your sales teams use Salesforce leads to work and qualify their prospects with the goal of creating opportunities.

Using leads can give your sales staff instant access to the latest prospects and ensures that no leads are ever dropped. Successful lead management helps sales and marketing manage the inbound lead process, track lead sources, and analyze return on their marketing investment.

From Setup, get started using lead management.

- Go to the object management settings for leads. From the fields section, create custom lead fields that track information specific to your company. Also, map your custom lead fields to account, contact, and opportunity fields so that the data gets converted when users convert leads. Edit the `Lead Status` picklist to choose the default status for new and converted leads.

- Enter *Lead Settings* in the `Quick Find` box, then select **Lead Settings** to specify your default lead settings.

- Enter *Assignment Rules* in the `Quick Find` box, then select **Lead Assignment Rules** to set up lead assignment rules that automatically assign leads.

- Enter *Web-to-Lead* in the `Quick Find` box, then select **Web-to-Lead** to automatically capture leads from your website.

- To let your marketing and sales operations teams edit converted leads, assign those users the "View and Edit Converted Leads" permission.

To create sales queues for leads or custom objects, from Setup, enter *Queues* in the `Quick Find` box, then select **Queues**.

EDITIONS
Available in: Salesforce Classic and Lightning Experience
Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Managing Leads

Before your organization begins using leads, you can perform the following setup:

- Customize the default Lead Settings.
- Create lead queues to help manage the distribution of leads.
- Set up lead assignment rules to automatically assign leads.
- Set up Web-to-Lead to automatically capture leads from your website.
- Import your organization's existing leads.
- Create custom lead fields.
- Map custom lead fields to other custom fields for lead conversion.
- Edit the `Lead Status` picklist to choose the default status for new and converted leads.

EDITIONS
Available in: Salesforce Classic and Lightning Experience
Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Define Default Settings for Lead Creation

Optimize lead management features for your sales teams so they can nurture leads efficiently and prevent duplicate records when it's time to convert the leads to contacts, accounts, and opportunities.

1. From Setup, enter `Lead Settings` in the `Quick Find` box, then select **Lead Settings**, and then click **Edit**.

2. Define the default lead owner and lead conversion settings.

3. Save your settings.

Map Custom Lead Fields for Lead Conversion

Get the most out of records created from the leads your sales teams convert when you map custom lead fields to the fields of records they're converted to.

When sales reps convert qualified leads, the information from the standard lead fields appears in standard fields for contact, account, and opportunity records. If you set up custom lead fields, you specify how that custom information converts to custom fields in accounts, contacts, and opportunities.

1. From the object management settings for leads, go to the fields section, then click **Map Lead Fields**.

2. For each custom lead field, choose a custom account, contact, or opportunity field into which you want the information inserted when you convert a lead. In Lightning Experience, a custom lead field can map to account, contact, and opportunity fields at the same time.

3. Save your work.

📝 Note: In Lightning Experience and Salesforce Classic, custom field mapping for lead conversion is available in orgs that use APEX Lead Convert, and not in orgs that use the older PLSQL Lead Convert.

SEE ALSO:

Guidelines for Mapping Custom Lead Fields for Lead Conversion

Guidelines for Mapping Custom Lead Fields for Lead Conversion

Learn the best practices for mapping custom lead fields to custom fields in contacts, accounts, and opportunities. Mapping custom fields helps your sales reps retain that important information when they convert qualified leads to track new potential deals.

- The following Lead custom field types can only be mapped to custom fields of the same data type.

  - Checkbox
  - Currency
  - Date
  - Date/Time
  - Email
  - Geolocation
  - Encrypted (Classic)
  - Number
  - Percent
  - Phone
  - Multi-select Picklist
  - Long Text
  - Rich Text
  - URL

- Each target field can have only 1 source field mapped to it.
- You can map auto-number fields to field types text or text area.
- You can map text and text area fields to custom field types of text, text area, long text, and picklist. If you map to a picklist field, the picklist must be unrestricted.
- You can map custom picklist fields to custom field types of text, text area, and picklist (unrestricted), but not long text.
- When mapping between picklist and text fields, your data truncates if the source field value is longer than the target field allows.
- Custom lookup fields can be mapped to a lookup field pointing to the same object. For example, a lead custom lookup field pointing to the Account object can be mapped to a contact custom lookup field that also points to the Account object.
- When mapping custom lead fields, the selected account, contact, or opportunity field must be of equal or greater length.
- You can't delete lead, account, contact, or opportunity fields included in Lead Custom Field Mapping. To delete a field, first remove its mapping.
- You can't change the field type of a field that's included in Lead Custom Field Mapping. To change a field's type, remove its mapping first.
- You can't uninstall a package that references fields included in Lead Custom Field Mapping. Remove any mappings of referenced fields before uninstalling the package.
- When mapping lead custom number, currency, or percent fields the target field must have the same length and number of decimal places.

> **Note:** Do not map custom formula fields to other formula fields or any other type of field.

SEE ALSO:

Map Custom Lead Fields for Lead Conversion

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Leads Created from Your Company's Website

Gather information from your company's website and automatically generate up to 500 new leads a day with Web-to-Lead.

If your company already has a form in which prospects enter their contact information, consider creating a jump page where prospects respond to a campaign. With a little extra HTML code, redirect that information to Salesforce to create leads.

IN THIS SECTION:

Guidelines for Setting Up Web-to-Lead

Get Salesforce ready to gather information from your company's website and automatically generate up to 500 new leads a day.

Generate Leads from Your Website for Your Sales Teams

Automatically generate up to 500 leads per day with the prospecting data from your company's website visitors. When you set up Web-to-Lead, Salesforce captures prospects who provide contact information. You can also redirect prospects to other Web pages that are critical to campaign success.

SEE ALSO:

Define Default Settings for Lead Creation

Guidelines for Setting Up Web-to-Lead

Get Salesforce ready to gather information from your company's website and automatically generate up to 500 new leads a day.

If you want to	Make sure to
Track special lead information that standard fields for Salesforce leads don't accommodate	Create custom lead fields and specify how you want them to map to custom fields for accounts, contacts, and opportunities during lead conversion.
Automatically send prospects email after they've submitted information through your website	Create public email templates. If you plan to set up email response rules to use different email templates depending on the information submitted, create one default template to send when none of your response rules apply.
Set the default status for new and converted leads	Use the `Lead Status` picklist to do so.
Assign leads to sales reps and queues	• Create lead queues if you want to assign leads to queues instead of individual sales reps. • Indicate the default owner of leads that fail to meet the criteria in your assignment rule using Customize Lead Settings. • Determine how web-generated leads get assigned to users or queues by creating a lead assignment rule and activating

If you want to	Make sure to
	it. If the rule is inactive, all web-generated leads get assigned to the default owner you specify in Lead Settings.

SEE ALSO:

Leads Created from Your Company's Website

Generate Leads from Your Website for Your Sales Teams

Generate Leads from Your Website for Your Sales Teams

Automatically generate up to 500 leads per day with the prospecting data from your company's website visitors. When you set up Web-to-Lead, Salesforce captures prospects who provide contact information. You can also redirect prospects to other Web pages that are critical to campaign success.

You must have a reCAPTCHA key pair if you want to use spam filtering.

1. From Setup, enter `Web-to-Lead` in the `Quick Find` box, then select **Web-to-Lead**.

2. Click **Edit** to enable or change Web-to-Lead settings.

3. If you want automate email replies to prospects, select a default response template. If you set up response rules to use different email templates based on the information prospects provide, the default response template is used when no auto-response rules apply. Templates must be marked *Available for Use*.

4. Save your changes.

5. To create a form that captures prospect details on your website, click **Create Web-to-Lead Form**, and then select fields you want to include.

6. Select fields to include on your Web-to-Lead form. Use the Add and Remove arrows to move fields between the Available Fields list and the Selected Fields list, and use the Up and Down arrows to change the order of the fields on your form.

   - Select the `Campaign` field.

   - For organizations using multiple currencies, add the `Lead Currency` field if you add currency amount fields, otherwise all amounts will be captured in your corporate currency.

   - Use a custom multi-select picklist to allow potential customers to express interest in several products.

   - For organizations using lead record types, select the `Lead Record Type` field if you want users to select a record type for Web-generated leads.

7. If your organization uses the Translation Workbench or has renamed tabs, select the language for the form labels displayed on your Web-to-Lead form. The source of your Web-to-Lead form is always in your personal language.

8. Specify the complete URL to which users should be directed after they submit their information—for example, your company's home page for a thank you page—and click **Generate**.

9. If you want to add a reCAPTCHA widget to the lead submission form, select **Enable spam filtering (recommended)**.

   - Specify the reCAPTCHA API Key Pair using the lookup.

   - If you want to allow all traffic in the case that the Google reCAPTCHA servers aren't available, select **Enable server fallback**.

10. Copy the generated HTML code and provide it to your company's webmaster to incorporate into your website.

11. Click **Finished**.

To test the Web-to-Lead form, add the line `<input type="hidden" name="debug" value="1">` to your code. This line redirects you to a debugging page when you submit the form. Remove this line before releasing the Web-to-Lead page to your website.

Leads generated from your website are initially marked with the "default status" specified by the `Lead Status` picklist. For Web leads generated as part of a campaign, the member status of the new leads is set to the `Member Status` value specified in the form, or to the "default" member status if the `Member Status` field is not included in the form.

In addition, new leads are marked as "Unread," and are changed to "Read" when viewed or edited by the lead owner. Users can select the My Unread Leads list view to quickly locate their new leads.

> 📝 **Note:** The format for date and currency fields captured online is taken from your organization's default settings - `Default Locale` and `Currency Locale`.
>
> The daily limit for Web-to-Lead requests is 500. If your organization exceeds its daily Web-to-Lead limit, the Default Lead Creator (specified in the Web-to-Lead setup page) receives an email containing the additional lead information. See How many leads can we capture from our website? for additional information on Web-to-Lead limits.
>
> If a new lead cannot be generated due to errors in your Web-to-Lead setup, Customer Support is notified of the problem so that we can help you correct it.
>
> Salesforce runs field validation rules before creating records submitted via Web-to-Lead and only creates records that have valid values.
>
> All universally required fields must have a value before a record can be created via Web-to-Lead.
>
> Salesforce doesn't support rich text area (RTA) fields on Web-to-Lead forms. If you use RTA fields on your forms, any information entered in them is saved as plain text when the lead is created.

SEE ALSO:

    Guidelines for Setting Up Web-to-Lead

    Leads Created from Your Company's Website

Let Users View and Edit Converted Leads

Assign the "View and Edit Converted Leads" permission to let marketing and sales operations users view converted leads. Users can also edit converted leads.

1. From Setup, enter Permission Sets. Click **Permission Sets**.

2. Click New.

3. Enter a name for the permission set. Click Save.

4. Click Edit.

5. Under Sales, select the View and Edit Converted LEads permission.

6. Save the permission set.

7. From Setup, enter Users. Click **Users**.

8. Click the user you want to assign the new permission set to.

9. Scroll to the Permission Sets related list and then click **Edit Assignments**.

10. Assign the permission set to the user and click Save.

The locations where converted leads appear depends on the interface you are using.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To assign a permission set to users:
- "Assign Permission Sets"

Where can I see converted leads?	Lightning Experience	Salesforce Classic	Salesforce1
Recent Items list		✔	
Recent Records list in the Global Navigation tab	✔		
Global Search Results	✔	✔	
Global Search Most Recently Used list	✔		
Recently Viewed list views	✔	✔	✔
Campaign Member related list (only leads added after conversion)	✔	✔	
Custom Lead lookup fields	✔	✔	✔
Lead reports	✔	✔	✔
Recent Records on Home page	✔		

Users can't unconvert leads.

Increase Process Adoption

Path

Path guides your users along the steps in a process, such as working an opportunity from a fresh lead to a successfully closed deal. Path is available for leads, opportunities, quotes, and custom objects in Lightning Experience, and for opportunities in all versions of the Salesforce1 mobile app.

EDITIONS

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

You can set up one path for each available record type. Steps for each path (1) are based on values in a picklist you select when you set up the path.

Select up to five key fields to focus users on the most critical information (2). At each step on the path, help users succeed with handy step-specific guidance, such as tips, links, and company policy information (3).

To enable Path and set up new paths, from Setup, enter `Path Settings` in the `Quick Find` box.

Help Sales Reps Manage Their Meetings and Tasks

Help Your Sales Reps Manage Events and Tasks Together

Give sales reps a more accurate perspective on their leads, contacts, opportunities, and accounts. Use combined activities settings to help them manage and track meetings and tasks. Options differ for Lightning Experience and Salesforce Classic.

IN THIS SECTION:

Considerations for the Activity Composer and Activity Timeline in Lightning Experience

In some Salesforce orgs, page layouts or record types need adjustments to prevent tabs from disappearing from the activity composer. Also, if you customize the display and order of fields in the activity timeline, be aware of the behavior of certain fields.

Considerations for Activity Reminder Setup in Salesforce Classic

Disabling individual preferences for displaying event and task reminders erases users' activity reminder settings. If you re-enable activity reminders later, users receive reminders only for activities they create or edit after you re-enable the setting.

Considerations for Shared Activities (Multiple Contacts on an Activity)

Use Shared Activities to let users relate multiple contacts to each event or task and to view information about open activities and activity history on contact detail pages. If you enable Shared Activities, or if it's enabled by default in your Salesforce org, you can't disable it. Whether you enable Shared Activities or leave it disabled, review these considerations.

Guidelines for Shared Activities (Multiple Contacts on an Activity)

To include related contacts alongside other event and task details, include the Name related list in the event and task detail page layouts.

SEE ALSO:

Customization Options for Managing Events and Tasks Together

Considerations for the Activity Composer and Activity Timeline in Lightning Experience

In some Salesforce orgs, page layouts or record types need adjustments to prevent tabs from disappearing from the activity composer. Also, if you customize the display and order of fields in the activity timeline, be aware of the behavior of certain fields.

IN THIS SECTION:

Display Tabs in Activity Composer by Adjusting Page Layouts and Record Types

In some Salesforce orgs, displaying tabs in the activity composer in Lightning Experience requires you to adjust settings.

Considerations for the Timeline and Activity Related Lists

On the detail page for objects that support activities, Lightning Experience doesn't display the Open Activities and Activity History related lists along with other related lists. It displays the activity timeline instead. Objects that support activities include opportunities, leads, accounts, contacts, contracts, and custom objects on which you enable activities.

Considerations for Customizing Activity Timeline Fields

You can use compact layouts to customize the display and order of fields for items in the activity timeline. Be aware that certain essential fields remain in the timeline even if you delete them from a layout. Icons in the timeline aren't customizable.

SEE ALSO:

Guidelines for Customizing the Task List in Lightning Experience

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

Display Tabs in Activity Composer by Adjusting Page Layouts and Record Types

In some Salesforce orgs, displaying tabs in the activity composer in Lightning Experience requires you to adjust settings.

IN THIS SECTION:

Configure the Call, Task, and Event Tabs in the Activity Composer in Lightning Experience

Is the call, task, or event tab missing from the activity composer on opportunities or other objects in your Salesforce org? Check your layout, record type, and permissions settings.

Configure the Email Action in the Activity Composer in Lightning Experience

Is the Email action missing from the activity composer on opportunities or other objects in your Salesforce org? Check your layout and permissions settings.

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

Configure the Call, Task, and Event Tabs in the Activity Composer in Lightning Experience

Is the call, task, or event tab missing from the activity composer on opportunities or other objects in your Salesforce org? Check your layout, record type, and permissions settings.

1. Look at the object's page layout—opportunities, leads, accounts, contacts, or a custom object that supports activities. Check whether you've included the corresponding action in the Salesforce1 and Lightning Experience Actions section of the object's page layout.

   Note: An object page inherits the actions of the global page layout unless you've customized the actions in the Salesforce1 and Lightning Experience Actions section of the object's page layout.

2. Have you created a custom record type for calls, tasks, or events? (Record types determine a record's layout and picklist values. You can define one or more record types for users to choose from when they create an event or a task.) Look at the page layout that you've associated with the custom record type. Ensure that you've assigned the custom record type to the corresponding action. For example, if you created a custom record type for calls, assign it to the Log a Call action.

3. Ensure that your users have permission to view that custom record type.

Configure the Email Action in the Activity Composer in Lightning Experience

Is the Email action missing from the activity composer on opportunities or other objects in your Salesforce org? Check your layout and permissions settings.

1. If the Email action is missing from the activity composer, open the page layout assigned to the record type for the opportunity or other object.

2. Add the **Send an Email** action (*not* the Send Email action) to the Salesforce1 and Lightning Experience Actions section of the page layout.

3. Make sure that your users have the **Send Email** (*not* Send an Email) permission.

Considerations for the Timeline and Activity Related Lists

On the detail page for objects that support activities, Lightning Experience doesn't display the Open Activities and Activity History related lists along with other related lists. It displays the activity timeline instead. Objects that support activities include opportunities, leads, accounts, contacts, contracts, and custom objects on which you enable activities.

Considerations for Customizing Activity Timeline Fields

You can use compact layouts to customize the display and order of fields for items in the activity timeline. Be aware that certain essential fields remain in the timeline even if you delete them from a layout. Icons in the timeline aren't customizable.

Display and Order of Fields

Use compact layouts to customize the display and order of fields in the timeline. However, certain fields remain in the timeline even if you remove them from the layout, because they contain essential activity information. For example, suppose that you remove the due date, the date and time, or the task status fields from the compact layouts. The event start date and time, the task checkbox, the task due date, and the call logging date still appear on activities in the

timeline. The description field on events and the comments field on tasks also always appear in the timeline, although they aren't available in the compact layout. The remaining fields visible in the timeline reflect the fields you include in the compact layout.

Icons

The icons for activity types (events, tasks, calls, and email) in the timeline aren't customizable.

Considerations for Activity Reminder Setup in Salesforce Classic

Disabling individual preferences for displaying event and task reminders erases users' activity reminder settings. If you re-enable activity reminders later, users receive reminders only for activities they create or edit after you re-enable the setting.

Considerations for Shared Activities (Multiple Contacts on an Activity)

Use Shared Activities to let users relate multiple contacts to each event or task and to view information about open activities and activity history on contact detail pages. If you enable Shared Activities, or if it's enabled by default in your Salesforce org, you can't disable it. Whether you enable Shared Activities or leave it disabled, review these considerations.

Enabling Shared Activities

Limit on Number of Contacts

Your sales reps can relate up to 50 contacts to each event or task.

Time Needed to Enable Shared Activities

Enabling Shared Activities takes up to 48 hours, depending on the volume of activity in your Salesforce org. During this process, sales reps can continue working with events and tasks. The Activity Settings page in Setup displays messages about the status and what to do if the process doesn't finish.

Display of Related Contacts Alongside Other Activity Details

To show related contacts on event and task detail pages, ensure that the Name related list is included on event and task page layouts. Be aware that the items in the Name related list aren't fields, so they don't adhere to field-level security settings.

Visualforce Display of Events

If a Visualforce page uses the standard controller to display Shared Activities events, use API version 26.0 or later.

Reports

When more than one contact is related to an event, activity reports don't show child events to that event if they are assigned to users who aren't below you in the role hierarchy.

Leaving Shared Activities Disabled

Limitations in Custom Reports Based on Activity Relationships

If you don't enable Shared Activities, custom reports based on activity relationships work as follows.

- They show only invitees to an event but not the organizer.
- They don't show events to which no one has been invited.

No Support for Activity Custom Lookups

If you don't enable Shared Activities, custom report types that use activity custom lookup field relationships aren't supported.

Duplicate Records Created for Email

If you don't enable Shared Activities and a sales rep sends an email to multiple contacts, Salesforce creates a closed task for each contact. As a result, Salesforce creates duplicate records instead of just one task corresponding to the email.

Guidelines for Shared Activities (Multiple Contacts on an Activity)

To include related contacts alongside other event and task details, include the Name related list in the event and task detail page layouts.

Help Your Sales Reps Manage Events and Calendars

Optimize the way your sales reps manage their meetings and scheduling. Options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

IN THIS SECTION:

Create and Manage a Public Calendar or a Resource Calendar in Salesforce Classic

Use a public calendar to manage group activities. For example, track a group's events, such as marketing events, product releases, or training classes, or schedule a common activity, such as a team vacation. Use a resource calendar to schedule the use of a shared resource, such as a conference room or an overhead projector.

Set Up Cloud Scheduler in Salesforce Classic

The New Meeting Request button is enabled by default on page layouts. It lets your users use Cloud Scheduler to request meetings with customers. The button appears on the Open Activities related list on the detail pages of contacts, leads, and person accounts.

Event Fields

Event records have standard fields for tracking and recording event details.

SEE ALSO:

Customization Options for Events and Calendars

Create and Manage a Public Calendar or a Resource Calendar in Salesforce Classic

Use a public calendar to manage group activities. For example, track a group's events, such as marketing events, product releases, or training classes, or schedule a common activity, such as a team vacation. Use a resource calendar to schedule the use of a shared resource, such as a conference room or an overhead projector.

You can create an unlimited number of calendars.

- View and edit your existing public calendars and resource calendars.

  From Setup, enter *Public Calendars and Resources* in the Quick Find box, then select **Public Calendars and Resources**.

- Create a public calendar or a resource calendar.

  1. Click **New**, name the calendar, select **Active**, and save the calendar.

  2. Click **Sharing**. Add the public groups, roles, or people you want to share the calendar with.

  3. In Calendar Access, specify the way you want to share the calendar.

     Hide Details

     Other people can see whether given times are available, but they can't see other information about events in the calendar.

     Hide Details and Add Events

     Other people can see whether given times are available, but they can't see details of events. Other people can insert events in the calendar.

     Show Details

     Other people can see detailed information about events in the calendar.

     Show Details and Add Events

     Other people can see detailed information about events in the calendar, and they can insert events in the calendar.

     Full Access

     Other people can see detailed information about events in the calendar, insert events in the calendar, and edit existing events in the calendar.

- Delete a public calendar.

  1. From Setup, enter *Public Calendars and Resources* in the Quick Find box, then select **Public Calendars and Resources**.

  2. Click **Del** next to the name of a calendar.

Ensure that users have the appropriate permissions. For example, an event invitee who doesn't have "Read" permission on opportunities can't view the opportunity associated with the event.

Set Up Cloud Scheduler in Salesforce Classic

The New Meeting Request button is enabled by default on page layouts. It lets your users use Cloud Scheduler to request meetings with customers. The button appears on the Open Activities related list on the detail pages of contacts, leads, and person accounts.

> ⓘ **Important:** Cloud Scheduler is unavailable in Salesforce orgs created in Winter '17 or later. If you enabled Cloud Scheduler before Winter '17, it remains available in your org until Winter '18. However, if you remove the **New Meeting Request** button, you can't add it back. For more information, see Cloud Scheduler to begin phased retirement with Winter '17.

Use the following methods alone or in combination to control whether the New Meeting Request button is displayed on detail page layouts. The button is also available in the Calendar section on the Home tab when the Requested Meetings subtab is enabled. The following add and remove actions don't affect the button in the Calendar section.

Cloud Scheduler Quick Setup for Multiple Page Layouts

1. From Setup, enter `Cloud Scheduler` in the `Quick Find` box, and then select **Cloud Scheduler**.

2. If you're adding the button and the new UI theme isn't already enabled, enable it on the User Interface page in Setup.

3. To add the **New Meeting Request** button to the Open Activities related list on all eligible page layouts, click **Add Button**. To remove the button from all current page layouts, click **Remove Button**.

Cloud Scheduler Manual Setup for Individual Page Layouts

1. If you're adding the button and the new UI theme isn't already enabled, enable it on the User Interface page in Setup. See User Interface Settings.

2. Add or remove the **New Meeting Request** button to the Open Activities related list on the page layouts you want.

   - Contacts
   - Leads
   - Person Accounts (if enabled)

     To allow users to request a meeting with a person account, add the `Email` field to the page layout. From the object management settings for person accounts, go to Page Layouts.

Cloud Scheduler Optional Settings

You can optionally enable these settings to make Cloud Scheduler even more useful.

- Ask your users to install Salesforce for Outlook.

  We recommend that users sync their calendar events between Salesforce and Outlook to propose meeting times based on their availability displayed in their Salesforce calendar.

- Add your company logo to the meeting requests sent to invitees.

- Show requested meetings in the Calendar section on the Home tab.

  The Requested Meetings subtab is displayed by default. If you remove the New Meeting Request button from all page layouts, we recommend that you also remove the Requested Meetings subtab because your users can't request meetings.

- Enable your Partner users to request meetings using Cloud Scheduler. The customPartner User profile must have the correct user permissions on page 176, and it must be active and assigned to your Partner users.

User Permission Requirements

Users must have the "Send Email" and "Edit Events" permissions to request meetings. These permissions are enabled in most standard profiles.

If users don't have the required permissions, they:

- Can't see the New Meeting Request button on the Open Activities related list
- Can't edit, reschedule, or cancel requested meetings

Field-Level Security Requirements

In most cases, you don't need to change field-level security settings to allow users to request meetings. However, if you've changed the default field-level security settings for certain profiles in your Salesforce org, refer to the following table to check wether the changes prevent users from requesting meetings.

> **Note:** In permission sets and the enhanced profile user interface, the setting labels differ from those in the original profile user interface and in field-level security pages for customizing fields.

Object	Field	Required Field-Level Security Settings		Description
		Permission Sets and Enhanced Profile User Interface	**Original Profile User Interface and Customize Field Pages**	
Event	`Name`	`Read` and `Edit`	`Visible` (with `Read-Only` *not* selected)	If this field isn't readable, the New Meeting Request button isn't displayed on the Open Activities related list, and an "insufficient privileges" message is displayed when a user tries to change (confirm or reschedule) or view a requested meeting.
				If this field is readable but not editable, the New Meeting Request button isn't displayed on the Open Activities related list, and requested meetings open as read only, preventing users from confirming or rescheduling the meeting.
	`Description`	`Read`	`Visible`	By default, when a requested meeting is confirmed, the last message sent from the meeting organizer is displayed in the `Description` field for the new event.
				However, if field-level security for the `Description` field isn't readable, the last message isn't displayed in the `Description` field, even if field-level security is later set to readable.

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IN THIS SECTION:

Guidelines for Adding Custom Logos to Meeting Requests in Salesforce Classic

You can display a custom logo in communications, such as meeting requests. Use these guidelines for custom logo images.

Guidelines for Adding Custom Logos to Meeting Requests in Salesforce Classic

You can display a custom logo in communications, such as meeting requests. Use these guidelines for custom logo images.

A custom logo appears in the following locations.

- Email requests sent to invitees when you request a meeting or schedule an event

- Meeting response pages where invitees select the times they can meet

- Event response pages where invitees accept or decline the event

When you use a custom logo, keep the following in mind.

- The image must be smaller than 20 KB and formatted as a .gif, .jpeg, or .png file.

- For best results, use an image smaller than 130 pixels wide, 100 pixels high, and 72 pixels per inch. Automatic resizing can prevent larger images from displaying correctly in some email clients.

- Upload your logo to the Documents tab to make it externally available.

  > 📝 Note:
  >
  > – Other users can replace the logo if it's in the Shared Documents folder. To prevent unwanted changes, create a folder accessible only to system administrators and upload the logo to this folder.
  >
  > – You can't use a logo that is stored in the My Personal Documents folder or marked Internal Use Only.

- You can't delete a custom logo from the Documents tab when it's being used in meeting requests. Either select another image to use as your logo, or uncheck the option to display a custom logo in meeting requests.

Event Fields

Event records have standard fields for tracking and recording event details.

IN THIS SECTION:

Event Fields in Lightning Experience

These standard fields for tracking and recording event details are available in Lightning Experience.

Event Fields in Salesforce Classic

These standard fields for tracking and recording event details are available in Salesforce Classic.

Event Fields in Lightning Experience

These standard fields for tracking and recording event details are available in Lightning Experience.

Field	Description
Activity Currency	Indicates the default currency for all currency amount fields in the activity. Amounts are displayed in the activity currency. They are also converted to the user's personal currency. Available only in orgs in which multiple currencies are used.
All-Day Event	By selecting this checkbox, a user specifies that the event lasts all day.
Assigned To	Indicates the assigned owner of the event. By default, the event is assigned to the user who created it.
	On an event detail page or list view, `Assigned To` denotes the event creator. However, if an event invitee views a report on Activities with Contacts, `Assigned` denotes the viewer as the invitee.
	This field isn't available in Personal Edition.
Created By	Indicates the user who created the event, including the creation date and time. Read only.
Date	Indicates the planned date of the event. This field is displayed only if multiday events are disabled.
Description	Description of the event. The limit is 32 KB of data.
Division	Indicates the division to which the activity belongs. This value is inherited from the related account, lead, case, or custom object, if any. Otherwise, the activity belongs to the global division. Available only in orgs in which divisions are used to segment data.
Duration	Represents the length of an event spanning less than a full day, in hours and minutes. This field appears only if multiday events are disabled.
Email	Contains the email address of the contact or lead related to the event. This field is filled in with the value from the related contact or lead record.
End	Indicates the planned end date and time of the event. This field appears only if multiday events are enabled.
Event Record Type	Contains the name of the field that determines which picklist values are available for the record. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.
Last Modified By	Contains the name of the user who last changed the event, including the modification date and time. Read only.
Name	Contains the name of the contact or lead related to the event. If Shared Activities is enabled in your org, a user can relate up to 50 contacts to a non-recurring event. This field is visible only to users with the "Read" permission for contacts and leads. Relating a

Field	Description
	contact to an event can affect the account to which Salesforce relates the event. See the `Related To` field.
Location	Indicates the location of the event.
Phone	Contains the phone number of the contact or lead related to the event. This field is filled in with the value from the related contact or lead record.
Private	Indicates whether users other than the event owner can see the event details when viewing the event owner's calendar. However, users with the "View All Data" or "Modify All Data" permission see private event details in reports and searches or when viewing other users' calendars. Exported data files always contain private events. Events with invitees and events being added or changed in another user's calendar can't be marked private. Private events can't be related to other records.
Public	**Note:** Before Summer '13, this field was called `Visible in Self-Service`.
	This checkbox lets a user specify whether a past event is visible in the Self-Service portal.
	Note: Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.
	If Communities is enabled in your org, the value in this field specifies whether the event is visible to external users in communities. If an external user owns the event, that user sees the event in the community regardless of whether the event is marked public.
	This field is not visible by default. A Salesforce admin can expose it.
Related To	Represents the record that the event is related to, such as an account, an opportunity, or a custom object. This field is available only when a user relates the event to a contact, not to a lead. The record is visible only to users with the "Read" permission for the type of record the event is related to.
	If you relate the event to an object other than an account, Salesforce determines the account on the event as follows.
	• Suppose that a user relates the event to an opportunity, a contract, or a custom entity that belongs to an account. Salesforce uses that object's account as the account for the event.

Field	Description
	• Suppose that a user relates the event to some other object and also to a contact. Salesforce uses the primary contact's account as the account for the event. • If a user leaves the `Related To` field empty, then Salesforce doesn't relate an account to the event.
Show Time As	Determines how the event appears when other users view a user's calendar: busy, out of office, or free.
Start	Planned start date and time of event. This field appears only if multiday events are enabled.
Subject	Contains the subject of the event.
Time	Indicates the start time of a planned event. This field appears only if multiday events are disabled.
Type	Indicates the event type; for example, email or meeting. Limit for values in the picklist is 40 characters.

Event Fields in Salesforce Classic

These standard fields for tracking and recording event details are available in Salesforce Classic.

Field	Description
Activity Currency	Indicates the default currency for all currency amount fields in the activity. Amounts are displayed in the activity currency. They are also converted to the user's personal currency. Available only in orgs in which multiple currencies are used.
All-Day Event	By selecting this checkbox, a user specifies that the event lasts all day.
Assigned To	Indicates the assigned owner of the event. By default, the event is assigned to the user who created it. On an event detail page or list view, `Assigned To` denotes the event creator. However, if an event invitee views a report on Activities with Contacts, `Assigned` denotes the viewer as the invitee. This field isn't available in Personal Edition.
Create Recurring Series of Events	By selecting this checkbox, a user can set up a series of recurring events.

Field	Description
Created By	Indicates the user who created the event, including the creation date and time. Read only.
Date	Indicates the planned date of the event. This field is displayed only if multiday events are disabled.
Description	Contains a note describing the event. This field holds up to 32 KB of data.
Division	Indicates the division to which the activity belongs. This value is automatically inherited from the related account, lead, case, or custom object, if any. Otherwise, the activity belongs to the global division. Available only in orgs in which divisions are used to segment data.
Duration	Represents the length of an event spanning less than a full day, in hours and minutes. This field appears only if multiday events are disabled.
Email	Contains the email address of the contact or lead related to the event. This field is automatically filled in with the value from the related contact or lead record.
End	Indicates the planned end date and time of the event. This field appears only if multiday events are enabled.
Event Record Type	Contains the name of the field that determines what picklist values are available for the record. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.
Last Modified By	Contains the name of the user who last changed the event, including the modification date and time. Read only.
Name	Contains the name of the contact or lead related to the event. If Shared Activities is enabled in your org, a user can relate up to 50 contacts to a non-recurring event. This field is visible only to users with the "Read" permission for contacts and leads. Relating a contact to an event can affect the account to which Salesforce relates the event. See the `Related To` field.
Location	Indicates the location of the event.
Phone	Contains the phone number of the contact or lead related to the event. This field is automatically filled in with the value from the related contact or lead record.
Private	Indicates whether users other than the event owner can see the event details when viewing the event owner's calendar. However, users with the "View All Data" or "Modify All Data" permission can see private event details in reports and searches, or when viewing other users' calendars. Exported data files always contain private events. Events with invitees and events being added or changed

Field	Description
	in another user's calendar can't be marked private. Private events can't be related to other records.
Public	📝 **Note:** Before Summer '13, this field was called `Visible in Self-Service`.
	This checkbox specifies whether a past event is visible in the Self-Service portal.
	📝 **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.
	If Communities is enabled in your org, the value in this field specifies whether the event is visible to external users in communities. If an external user owns the event, that user sees the event in the community regardless of whether the event is marked public.
	This field is not visible by default. A Salesforce admin can expose it.
Related To	Represents the record that the event is related to, such as an account, an opportunity, or a custom object. This field is available only when a user relates the event to a contact, not to a lead. The record is visible only to users with the "Read" permission for the type of record the event is related to.
	If you relate the event to an object other than an account, Salesforce determines the account on the event as follows.
	• If you relate the event to an opportunity, contract, or custom entity that belongs to an account, Salesforce uses that object's account as the account for the event.
	• If you relate the event to any other kind of object also relate the event to a contact, Salesforce uses the primary contact's account as the account for the event.
	• If you leave the `Related To` field empty, then Salesforce doesn't relate an account to the event.
Response	Optional field; allows users invited to an event to enter a note when they accept or decline the event. This field isn't available in Personal Edition.
Select Invitees	Lets you relate up to 1,000 people (invitees) and resources to the event. When you search for people or resources to invite to an event, the Available list displays up to 300 results.
Show Time As	Picklist. Determines how the event appears when another user views your calendar: busy, out of office, or free.

Field	Description
Start	Planned start date and time of event. This field appears only if multiday events are enabled.
Subject	Contains the subject of the event; for example, "Meeting." A user can enter a subject or select from a list of previously defined subjects.
Time	Indicates the start time of a planned event. This field appears only if multiday events are disabled.
Type	Indicates the event type; for example, email or meeting. Limit for values in the picklist is 40 characters.

Help Your Sales Reps Manage Their Tasks

Optimize the way your sales reps manage their work. Options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

IN THIS SECTION:

Considerations for Customizing the Task List in Lightning Experience

Use compact layouts to customize the display and order of fields for items in the task list. However, certain fields remain in the task list even if you remove them from a layout, because they contain essential task information. For example, suppose that you remove the status and due date fields from a compact layout. The task checkbox and the due date still appear on tasks in the list. The remaining fields visible in the list reflect the fields you include in the compact layout.

Guidelines for Customizing the Task List in Lightning Experience

To customize the action bar next to the task list, use the Salesforce1 and Lightning Experience Actions section of the task page layout.

Considerations for Closing and Reopening Tasks

Salesforce Classic differs from Lightning Experience and Salesforce1in the way it handles validation rules on tasks.

Considerations for Email Notification of Task Assignments

When the setting **Enable user control over task assignment notifications** is enabled in Activity Settings, users see the option **Email me when someone assigns me a task** in their personal settings. Both the setting and the option are enabled by default. Enabling and disabling the setting affects users in different ways. Before migrating a Salesforce org, avoid excessive email notifications by disabling the setting. You can re-enable it after migration.

Task Fields

Task records have standard fields for tracking and recording task details.

Email Tracking in Salesforce Classic

If you use HTML email templates in Salesforce Classic, enable Salesforce to track outbound HTML emails as a type of completed task. If you disable this option, Salesforce no longer stores email tracking information. However, email tracking reports remain on the Reports tab. To display email statistics to your users, add the HTML Email Status related list to the relevant page layouts.

SEE ALSO:

Customization Options for Tasks

Considerations for Customizing the Task List in Lightning Experience

Use compact layouts to customize the display and order of fields for items in the task list. However, certain fields remain in the task list even if you remove them from a layout, because they contain essential task information. For example, suppose that you remove the status and due date fields from a compact layout. The task checkbox and the due date still appear on tasks in the list. The remaining fields visible in the list reflect the fields you include in the compact layout.

Guidelines for Customizing the Task List in Lightning Experience

To customize the action bar next to the task list, use the Salesforce1 and Lightning Experience Actions section of the task page layout.

SEE ALSO:

[Considerations for the Activity Composer and Activity Timeline in Lightning Experience](#)

Considerations for Closing and Reopening Tasks

Salesforce Classic differs from Lightning Experience and Salesforce1in the way it handles validation rules on tasks.

IN THIS SECTION:

[Considerations for Closing and Reopening Tasks in Lightning Experience](#)
Suppose that you've created a validation rule for tasks; for example, you require users to enter a comment before closing a task. If you've set up more than one Closed status for tasks, users must choose a status when they reopen or close a task. If you've set up more than one Open status for tasks and a user reopens a task, Lightning Experience remembers the last Open status.

[Considerations for Closing and Reopening Tasks in Salesforce Classic](#)
Suppose that you've created a validation rule for closing a task; for example, you require users to enter a comment. Before users can close a task, they must first open the task detail page and edit the task. Likewise, if you've set up more than one Open status for tasks, users must edit the task to choose a status when they reopen a task.

Considerations for Closing and Reopening Tasks in Lightning Experience

Suppose that you've created a validation rule for tasks; for example, you require users to enter a comment before closing a task. If you've set up more than one Closed status for tasks, users must choose a status when they reopen or close a task. If you've set up more than one Open status for tasks and a user reopens a task, Lightning Experience remembers the last Open status.

Considerations for Closing and Reopening Tasks in Salesforce Classic

Suppose that you've created a validation rule for closing a task; for example, you require users to enter a comment. Before users can close a task, they must first open the task detail page and edit the task. Likewise, if you've set up more than one Open status for tasks, users must edit the task to choose a status when they reopen a task.

Considerations for Email Notification of Task Assignments

When the setting **Enable user control over task assignment notifications** is enabled in Activity Settings, users see the option **Email me when someone assigns me a task** in their personal settings. Both the setting and the option are enabled by default. Enabling and disabling the setting affects users in different ways. Before migrating a Salesforce org, avoid excessive email notifications by disabling the setting. You can re-enable it after migration.

Table 1: Effects of Enabling and Disabling the Feature in Setup

User Type	Effects of Enabling the Feature	Effects of Disabling the Feature
Salesforce1 users, including Communities users	In **My Settings** > **Notifications**, the **Assigns you a task** checkbox is displayed.	In **My Settings** > **Notifications**, the **Assigns you a task** checkbox isn't displayed.
Lightning Experience users	In Lightning Experience, the **Email me when someone assigns me a task** checkbox isn't displayed. However, users who have turned on that option in Salesforce Classic still receive email notifications.	No user receives an email notification when another user assigns a task.
Salesforce Classic users, including Communities users	- On the Create Task page, the **Send email notification** and **Make this the default setting** checkboxes aren't displayed. - On the Reminders & Alerts page in the user's personal settings, the **Email me when someone assigns me a task** checkbox is displayed, and it's selected by default.	- On the Create Task page, the **Send email notification** and **Make this the default setting** checkboxes are displayed, and email notifications are sent according to whether the checkboxes are selected. - The **Email me when someone assigns me a task** checkbox isn't displayed.
Partner portal users	- On the Create Task page, the **Send email notification** and **Make this the default setting** checkboxes aren't displayed. - Email notifications are sent whenever someone assigns a task to a user (partner portals have no settings page for admins or users).	On the Create Task page, the **Send email notification** and **Make this the default setting** checkboxes are displayed, and email notifications are sent according to whether the checkboxes are selected.

User Type	Effects of Enabling the Feature	Effects of Disabling the Feature
Users who are assigned tasks that are generated by workflow task rules	- On the New Task page for workflow tasks, the **Notify Assignee** checkbox isn't displayed. - If a Salesforce admin selected the **Notify Assignee** checkbox before Winter '15, task assignees who deselect the option don't receive notifications.	Email notifications are sent to task assignees according to workflow task rules.
Users who are assigned tasks through an API	Use an API to set the `triggerUserEmail` value. The default is false. - If `triggerUserEmail = true`, notifications are sent according to individual users' settings. - If `triggerUserEmail = false`, email notifications aren't sent when a task is assigned.	- If `triggerUserEmail` is true, email notifications are sent to all users when tasks are assigned. - If `triggerUserEmail` is false, email notifications aren't sent when a task is assigned.
Users who are assigned tasks through Apex	Notifications that are sent through Apex are sent in the context of the request header.	If a value in the request header is set so that email notifications are sent, email notifications are sent to users when tasks are assigned. Apex processes the header sequentially from the first line to the last. If a statement in the request header indicates that a task notification is required, an email notification is sent regardless of statements later in the header.

Task Fields

Task records have standard fields for tracking and recording task details.

IN THIS SECTION:

Task Fields in Lightning Experience

These standard fields for tracking and recording task details are available in Lightning Experience.

Task Fields in Salesforce Classic

These standard fields for tracking and recording task details are available in Salesforce Classic.

Task Fields in Lightning Experience

These standard fields for tracking and recording task details are available in Lightning Experience.

Field	Description
Activity Currency	Indicates the default currency for all currency amount fields in the task. Amounts are displayed in the task currency and are also converted to a user's personal currency. Available only in orgs in which multiple currencies are used.
Assigned To	Indicates the assigned owner of a task. By default, the task is assigned to the user who created it. This field isn't available in Personal Edition.
Call Duration	Indicates the duration of a call in seconds. This field is populated when a call is answered using Salesforce CRM Call Center.
Call Object Identifier	Indicates the ID of a call logged in Salesforce through Salesforce computer-telephony integration (CTI) with a third-party telephony system. This field is often populated with the ID stored in the telephony system. Limit is 255 characters.
Call Result	Represents the result of a given call; for example, "we'll call back" or "call unsuccessful." Limit is 255 characters. A Salesforce admin can customize the selections in the picklist.
Call Type	Indicates the call type: inbound, internal, or outbound. A Salesforce admin can customize the selections in the picklist.
Comments	Contains a description of the task. The limit is 32 KB of data. If Spell Checker is enabled in your org, a user can spell-check the contents.
Create Recurring Series of Tasks	This checkbox lets a user set up a series of recurring tasks. Enabling this option disables the `Due Date` field, because each task occurrence in a series has a different due date.
Created By	Indicates the user who created the task, along with the task creation date and time. Read only.
Division	Indicates the division to which the task belongs. This value is inherited from the related account, lead, case, or custom object, if any. Otherwise, the task belongs to the global division. Available

Field	Description
	only in orgs in which divisions are used to segment data.
Due Date	Indicates the date when the task is due.
Email	Contains the email address of the contact or lead associated with the task. This field is filled in with the value from the related contact or lead record.
Last Modified By	Indicates the user who last changed the task, along with the task modification date and time. This field is read only.
Name	Contains the name of the contact or lead related to the task. If Shared Activities is enabled in your org, a user can relate up to 50 contacts to a non-recurring task. This field is visible only to users who have the "Read" permission for contacts and leads. Relating a contact to a task can affect the account to which Salesforce relates the task. See the `Related To` field.
Phone	Contains the phone number of the contact or lead related to the task. This field is filled in with the value from the related contact or lead record.
Priority	Indicates the urgency of the task; for example, low, medium, or high. A Salesforce admin can customize the selections in the picklist.
Public	**Note:** Before Summer '13, this field was called `Visible in Self-Service`. By selecting this checkbox, a user can specify that the completed task is visible in the Self-Service portal. **Note:** Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal. If Communities is enabled in your org, this field specifies whether a task is visible to external users in communities. If an external user owns the task, that user sees the task in the community regardless of whether it's marked Public. This field is not visible by default. A Salesforce admin can make it visible.
Related To	Indicates the record that the task is related to, such as an account or an opportunity. This field is available only when a user relates the task to a contact, not to a lead. The record is visible only to users with the "Read" permission for the type of record the task is related to. If a user relates the task to an object other than an account, Salesforce determines the account on the task as follows.

Field	Description
	• Suppose that a user relates the task to an opportunity, a contract, or a custom entity that belongs to an account. Salesforce uses that object's account as the account for the task.
	• Suppose that a user relates the task to some other object and also to a contact. Salesforce uses the primary contact's account as the account for the task.
	• If a user leaves the `Related To` field empty, Salesforce doesn't relate an account to the task.
Status	Indicates the status of a task; for example, "not started" or "completed." A Salesforce admin can customize the selections in the picklist.
Subject	Contains the subject of the task.
Task Record Type	Contains the name of the field that determines which picklist values are available for the record. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.
Type	Indicates the task type; for example, Email or Meeting. Limit for values in the picklist is 40 characters.

Task Fields in Salesforce Classic

These standard fields for tracking and recording task details are available in Salesforce Classic.

Field	Description
Activity Currency	Indicates the default currency for all currency amount fields in the task. Amounts are displayed in the task currency and are also converted to a user's personal currency. Available only in orgs in which multiple currencies are used.
Assigned To	Indicates the assigned owner of a task. By default, the task is assigned to the user who created it. This field isn't available in Personal Edition.
Call Duration	Indicates the duration of a call in seconds. This field is populated when a call is answered using Salesforce CRM Call Center.
Call Object Identifier	Indicates the ID of a call logged in Salesforce through Salesforce computer-telephony integration (CTI) with a third-party telephony system. This field is often populated with the ID

Field	Description
	stored in the telephony system. Limit is 255 characters.
Call Result	Represents the result of a given call; for example, "we'll call back" or "call unsuccessful." Limit is 255 characters. A Salesforce admin can customize the selections in the picklist.
Call Type	Indicates the call type: inbound, internal, or outbound. A Salesforce admin can customize the selections in the picklist.
Comments	Contains a description of the task. The limit is 32 KB of data.
Create Recurring Series of Tasks	By selecting this checkbox, a user can set up a series of recurring tasks. Enabling this option disables the Due Date field, because each task occurrence in a series has a different due date.
Created By	Indicates the user who created the task, along with the task creation date and time. Read only.
Division	Indicates the division to which the task belongs. This value is inherited from the related account, lead, case, or custom object, if any. Otherwise, the task belongs to the global division. Available only in orgs in which divisions are used to segment data.
Due Date	Indicates the date when the task is due.
Email	Contains the email address of the contact or lead associated with the task. This field is filled in with the value from the related contact or lead record.
Last Modified By	Indicates the user who last changed the task, along with the task modification date and time. This field is read only.
Name	Contains the name of the contact or lead related to the task. If Shared Activities is enabled in your org, a user can relate up to 50 contacts to a non-recurring task. This field is visible only to users who have the "Read" permission for contacts and leads. Relating a contact to a task can affect the account to which Salesforce relates the task. See the Related To field.
Phone	Contains the phone number of the contact or lead related to the task. This field is filled in with the value from the related contact or lead record.
Priority	Indicates the urgency of the task; for example, low, medium, or high. A Salesforce admin can customize the selections in the picklist.
Public	**Note:** Before Summer '13, this field was called Visible in Self-Service. By selecting this checkbox, a user can specify that the completed task is visible in the Self-Service portal.

Field	Description
	Note: Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.
	If Communities is enabled in your org, this field specifies whether a task is visible to external users in communities. If an external user owns the task, that user sees the task in the community regardless of whether it's marked Public.
	This field is not visible by default. A Salesforce admin can make it visible.
Related To	Indicates the record that the task is related to, such as an account or an opportunity. This field is available only when a user relates the task to a contact, not to a lead. The record is visible only to users with the "Read" permission for the type of record the task is related to.
	If a user relates the task to an object other than an account, Salesforce determines the account on the task as follows.
	• Suppose that a user relates the task to an opportunity, a contract, or a custom entity that belongs to an account. Salesforce uses that object's account as the account for the task.
	• Suppose that a user relates the task to any other object type and also to a contact. Salesforce uses the primary contact's account as the account for the task.
	• If a user leaves the `Related To` field empty, Salesforce doesn't relate an account to the task.
Status	Indicates the status of a task; for example, "not started" or "completed." A Salesforce admin can customize the selections in the picklist.
Subject	Contains the subject of a task; for example, "Email quote to customer." A user can enter a subject or select from a picklist of previously defined subjects.
Task Record Type	Contains the name of the field that determines which picklist values are available for the record. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.
Type	Indicates the task type; for example, Email or Meeting. Limit for values in the picklist is 40 characters.

Email Tracking in Salesforce Classic

If you use HTML email templates in Salesforce Classic, enable Salesforce to track outbound HTML emails as a type of completed task. If you disable this option, Salesforce no longer stores email tracking information. However, email tracking reports remain on the Reports tab. To display email statistics to your users, add the HTML Email Status related list to the relevant page layouts.

Customize Activities for Your Sales Reps

Optimize the way that your sales reps can manage events, calendars, and tasks. Customization options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

IN THIS SECTION:

Customization Options for Managing Events and Tasks Together

Give sales reps a more accurate perspective on their leads, contacts, opportunities, and accounts. Use combined activities settings to help them manage and track meetings and tasks. Options differ for Lightning Experience and Salesforce Classic.

Customization Options for Events and Calendars

Optimize the way your sales reps manage their meetings and scheduling. Options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

Customization Options for Tasks

Optimize the way your sales reps manage their work. Options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

Customization Options for Managing Events and Tasks Together

Give sales reps a more accurate perspective on their leads, contacts, opportunities, and accounts. Use combined activities settings to help them manage and track meetings and tasks. Options differ for Lightning Experience and Salesforce Classic.

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
Enable activity reminders	Let users set individual preferences for displaying event and task reminders.	From Setup, enter `Activity Settings` in the `Quick Find` box, then select **Enable Activity Reminders**. See also Considerations for Activity Reminder Setup in Salesforce Classic on page 172 and Activity Reminders in Salesforce Classic.		✔	

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
Allow multiple contacts (Shared Activities)	Let users relate up to 50 contacts to an event or a task.	From Setup, enter *Activity Settings* in the `Quick Find` box, then select **Allow users to relate multiple contacts to events and tasks**. See also Considerations for Shared Activities (Multiple Contacts on an Activity) on page 172 and Guidelines for Shared Activities (Multiple Contacts on an Activity) on page 173.	✔	✔	
Roll up activities to a contact's primary account	When an activity is associated with a contact, the activity is also displayed on the contact's primary account. If you let users relate contacts to multiple accounts, we recommend deselecting this option.	From Setup, enter *Activity Settings* in the `Quick Find` box, then select **Roll up activities to a contact's primary account**. See also Considerations for Changing How Activities Roll Up to Accounts.	✔	✔	✔

SEE ALSO:

Customization Options for Events and Calendars

Customization Options for Tasks

Configure the Call, Task, and Event Tabs in the Activity Composer in Lightning Experience

Customization Options for Events and Calendars

Optimize the way your sales reps manage their meetings and scheduling. Options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
Allow multiday events.	Let users create events that end more than one day (24 hours) after they start.	From Setup, enter *Activity Settings* in the `Quick Find` box, then select **Enable**	✔	✔	✔

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
		Multiday Events.			
Allow recurring events.	Let users create events that repeat at a specified interval. If you disable this setting, users can still edit the interval of an existing recurring event, but they can't create recurring events.	From Setup, enter *Activity Settings* in the Quick Find box, then select **Enable Creation of Recurring Events**.		✔	
Allow hover links on Home tab calendar.	Display event details when a user hovers the mouse over an event.	From Setup, enter *User Interface* in the Quick Find box, then select **Enable Home Page Hover Links for Events**.		✔	
Allow drag-and-drop calendar editing.	Let users drag to reschedule events on the day or week view of their own calendars.	From Setup, enter *User Interface* in the Quick Find box, then select **Enable Drag-and-Drop Editing on Calendar Views**.		✔	
Let users create events by clicking in the calendar.	Let users create an event by clicking a time slot in the calendar.	From Setup, enter *User Interface* in the Quick Find box, then select **Enable Click-and-Create Events on Calendar Views**.		✔	
Allow drag-and-drop scheduling on list views.	In contact and lead list views, let users schedule events by dragging a contact or lead into the calendar. You can customize the mini page layout for the	From Setup, enter *User Interface* in the Quick Find box, then select **Enable Drag-and-Drop Scheduling on List Views**. See also		✔	

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
	overlay where users enter event details.	Overview of Page Layouts and Field-Level Security.			
Enable sidebar calendar shortcut.	Display a link (📅) to a user's last-used calendar view in the sidebar above Recent Items.	From Setup, enter *User Interface* in the Quick Find box, then select **Enable Sidebar Calendar Shortcut**.		✔	
Enable hover link for My Tasks list.	Show task details in a popup on the Home tab when a user hovers the mouse over a task.	From Setup, enter *User Interface* in the Quick Find box, then select **Enable Hover Links for My Tasks list**.		✔	
Show event details in multiuser calendar view.	Display event details on-screen rather than on hover in daily, weekly, and monthly calendar views for all users. Enabling this setting doesn't override calendar sharing.	From Setup, enter *Activity Settings* in the Quick Find box, then select **Show event details on multi-user calendar view**.		✔	
Create public calendars and resource calendars.	Create calendars for managing group activities, such as marketing events, product releases, training classes, and team vacations, or shared resources, such as a conference room.	See Create and Manage a Public Calendar or a Resource Calendar in Salesforce Classic on page 174.		✔	
Set up meeting requests (Cloud Scheduler).	Display a button in the Open Activities related list on contacts, leads, and person accounts that lets users request	See Set Up Cloud Scheduler in Salesforce Classic on page 175.		✔	

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
	meetings with customers.				
Show Cloud Scheduler meeting requests on the Home tab.	Display the Requested Meetings subtab in the calendar on the Home tab. This subtab lists the meetings that a user has requested but aren't confirmed.	From Setup, enter *Activity Settings* in the Quick Find box, then select **Show Requested Meetings in the Calendar Section on the Home Tab**.		✔	
Show custom logo in Cloud Scheduler meeting requests.	Display a custom logo in communications, such as meeting requests. Invitees see the logo when you invite them to an event or request a meeting with them.	From Setup, enter *Activity Settings* in the Quick Find box, then select **Show custom logo in meeting requests**.		✔	

SEE ALSO:

Customization Options for Managing Events and Tasks Together

Customization Options for Tasks

Configure the Call, Task, and Event Tabs in the Activity Composer in Lightning Experience

Customization Options for Tasks

Optimize the way your sales reps manage their work. Options differ for Lightning Experience, Salesforce Classic, and Salesforce1.

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
Let users choose whether to receive email notifications for task assignments.	Display a setting that lets a user decide whether to receive an email notification when	From Setup, enter *Activity Settings* in the Quick Find box, then select **Enable user control over**	✔	✔	✔

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
	assigned a task.	**task assignment notifications**. See also Considerations for Email Notification of Task Assignments on page 185.			
Customize task list actions.	Customize the action bar displayed next to the task list.	See Guidelines for Customizing the Task List in Lightning Experience on page 184.	✔		
Allow recurring tasks.	Let users create tasks that repeat at a specified interval. If you disable this setting, users can still edit the interval of an existing recurring task, but they can't create more recurring tasks.	From Setup, enter *Activity Settings* in the Quick Find box, then select **Enable Creation of Recurring Tasks**.			✔
Let users assign copies of a task.	Let users assign independent copies of a new task to multiple users.	From Setup, enter *Activity Settings* in the Quick Find box, then select **Enable Group Tasks**.			✔
Show a simpler New Task page in Salesforce1.	Display a New Task page with key task fields first.	From Setup, enter *Activity Settings* in the Quick Find box, then select **Show simpler New Task form in Salesforce1**.	✔		

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	Salesforce1
Track and display email statistics.	Enable Salesforce to track outbound HTML emails when you use HTML email templates.	From Setup, enter `Activity Settings` in the `Quick Find` box, then select **Enable Email Tracking**. See also Email Tracking in Salesforce Classic on page 192.		✔	

SEE ALSO:

Customization Options for Managing Events and Tasks Together

Customization Options for Events and Calendars

Configure the Call, Task, and Event Tabs in the Activity Composer in Lightning Experience

Notes

Stay organized and on top of all your deals by adding notes to records. There are 2 tools for taking notes in Salesforce: the old note-taking tool and Notes, Salesforce's enhanced note-taking tool, which lets you use rich text, lists and images; relate notes to multiple records; and create notes in Lightning Experience.

You can have both note-taking tools enabled at the same time in Salesforce. However, notes created with a tool can only be read and edited using that tool. To help you decide which tool works for your company, check the following table.

Tool	Interface	Where to Create and Manage Notes	Key Features
Notes	• Lightning Experience • Salesforce Classic • Salesforce1	• Notes related list on records (must be added to all page layouts) • Notes tab in Lightning Experience • Notes tab in Salesforce1	• Rich text • Lists • Add notes to multiple records • Search notes • Automatic saving (Lightning Experience) • Revert to earlier versions (Lightning Experience) • Create tasks from notes (Salesforce1) • Images (Lightning Experience and Salesforce1)

Tool	Interface	Where to Create and Manage Notes	Key Features
			• See all notes that you own from the Notes tab Lightning Experience and Salesforce1)
Old note-taking tool	• Salesforce Classic • Salesforce1	Notes & Attachments related list on records	• Private notes • Notes automatically added to parent account • Notes added to contacts and opportunities roll up under the associated account • Available for Partner Portal or Customer Portal licenses

IN THIS SECTION:

Guidelines for Working with Notes

Review guidelines for adding and managing notes in Salesforce, including where to manage your notes, deleting notes, and note ownership.

Increase Collaboration by Sharing Notes

Increase collaboration on deals by sharing your notes with people and groups.

Revert to a Previous Version of a Note

With Notes, the enhanced note-taking tool for Salesforce, you can see and restore old versions of notes.

Set Up Notes

To let your sales reps take notes with rich text, lists, and images, set up Notes, the enhanced note-taking tool for Salesforce.

Guidelines for Working with Notes

Review guidelines for adding and managing notes in Salesforce, including where to manage your notes, deleting notes, and note ownership.

- To create or edit a note associated with a record, you must be able to edit the record.
- To delete a note associated with a record, you must be the owner of the note or the owner of the associated record.
- To delete a note that's *not* associated with a record, you must be the owner of the note.
- To create notes in Lightning Experience, you must use Notes. Your Salesforce administrator must enable Notes.
- You can't share notes in Salesforce1.
- When sharing a note in Lightning Experience, you can only give others viewer access, because Notes does not support simultaneous editing. If multiple people edit a note at the same time, they overwrite each other's content.

Guidelines for Notes

Watch a video: ▶ How to Use Notes

- To create and manage notes on records, use the Notes related list, which your Salesforce admin must add to page layouts.

- If Notes is disabled, you can't access notes that were created with it.

- Only notes taken with Notes appear on the Notes tab.

- To create standalone notes or manage all your notes, use the Notes tab (available in Lightning Experience and Salesforce1).

- After Notes is enabled, the old note-taking tool remains available for creating and managing notes in Salesforce Classic and Salesforce1. In Lightning Experience, the old note-taking tool is only used to read and manage notes that were created with it.

- Read old notes that were taken with the old note-taking tool from the Notes & Attachments related list on records. These notes don't appear in the Notes tab.

- In Salesforce1, create a task from a note by swiping a line on the note. Alternatively, tap on a line or highlight some text, and then tap ✔ in the toolbar. If your profile is assigned two or more task record types, you're asked to choose a record type each time you create a task from a note. If your profile is assigned less than two Task record types, the task is immediately created.

- After enabling Notes, the old note-taking tool remains available for creating and managing notes in Salesforce Classic and Salesforce1. In Lightning Experience, the old note-taking tool is only used to read and manage notes that were created with it.

Guidelines for the Old Note-Taking Tool

- All notes added to contacts and opportunities roll up under the associated account as well.

- Notes are automatically related to the parent account.

- To create and manage notes on records, use the Notes & Attachments related list. You can't create notes with the old note-taking tool in Lightning Experience.

- To restore deleted notes, use the Recycle Bin.

- If a note is marked private, it's only accessible to the person who created or attached it.

- If you publish notes to external contacts via Salesforce to Salesforce, all public notes are automatically shared with a connection when you share the parent object. If `Share With Connections` on the attachment is selected, the attachment is automatically shared.

- To stop sharing a note or attachment, select `Private`.

Increase Collaboration by Sharing Notes

Increase collaboration on deals by sharing your notes with people and groups.

> 📝 **Note:** In Lightning Experience, you can only provide Viewer access when sharing a note. Notes doesn't support simultaneous editing, and this restriction prevents multiple people from editing a note at the same time. If multiple people change a note at the same time, they overwrite each other's changes. You can't share notes in Salesforce1.

1. Open a note.
2. Click the share button.
3. Select who you'd like to share with and their level of access.
4. Enter a short message to the recipients.
5. To prevent the recipients from sharing or unsharing the note, click **Prevent others from sharing and unsharing**.
6. Click **Share**.

EDITIONS

Available in: Salesforce Classic, and Lightning Experience

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

The people you share with receive an email with your message and a link to the shared note.

Revert to a Previous Version of a Note

With Notes, the enhanced note-taking tool for Salesforce, you can see and restore old versions of notes.

> **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. From the record's Notes related list, click the note title.

2. In the note window, click ▾ .

3. From the list, select the version of the note you'd like to view.

4. To restore the selected version of the note, click **Restore**.

Set Up Notes

To let your sales reps take notes with rich text, lists, and images, set up Notes, the enhanced note-taking tool for Salesforce.

[Walk Through It]

1. Make sure that the Notes related list is on all your page layouts. If it's not, your users won't be able to create notes on records using Notes.

2. Make sure that Notes is enabled. From Setup, enter `Notes Settings` in the `Quick Find` box, then select **Notes Settings**.

3. To let reps take notes from the Chatter publisher, the Global Actions menu, and the Salesforce1 action bar, add the **New Note** quick action to Quick Actions in the Salesforce Classic Publisher and Salesforce1 and Lightning Experience Actions sections on the global publisher layout.

4. If you've overridden the global publisher layout on any of your object page layouts, add the **New Note** quick action to your custom layouts, too.

5. To let your reps easily take notes in Salesforce1:

    a. Make sure that your reps can create tasks from notes in Salesforce1. From Setup, enter `Activity Settings` in the `Quick Find` box, then select **Activity Settings**. Select `Allow Creation of Tasks from Notes`.

    b. Make sure that **Notes** appears in the Salesforce1 navigation menu. From Setup, enter `Navigation` in the `Quick Find` box, select **Salesforce1 Navigation**, and then move **Notes** from the Available list to the Selected list. We recommend putting it above **Smart Search Items**.

In Salesforce1, your reps can create tasks just by swiping lines in a note. If a user's profile is assigned more than one Task record type, the user is prompted to choose a record type for the task.

SEE ALSO:

Notes

Track Your Campaigns' Influence on Opportunities

Track how your campaigns contribute to your opportunities.

IN THIS SECTION:

[Let Marketing Track Effectiveness with Customizable Campaign Influence](#)
Customizable Campaign Influence lets you and your marketing department decide how credit is assigned to each campaign that contributes to bringing in an opportunity.

[Campaign Influence 1.0](#)
Use the original version of Campaign Influence to understand the return on your campaign investments.

Let Marketing Track Effectiveness with Customizable Campaign Influence

Customizable Campaign Influence lets you and your marketing department decide how credit is assigned to each campaign that contributes to bringing in an opportunity.

> **Note:** This information applies only to Customizable Campaign Influence and not to the original version of Campaign Influence.

IN THIS SECTION:

[Understanding Customizable Campaign Influence](#)
By allowing flexible revenue attribution across multiple campaigns, Customizable Campaign Influence offers better business intelligence, more marketing accountability, and improved alignment between sales and marketing.

[What's the Difference Between Campaign Influence and Customizable Campaign Influence?](#)
Customizable Campaign Influence includes several capabilities not found in the original version of Campaign Influence.

[Configure Customizable Campaign Influence](#)
To set up and deploy Customizable Campaign Influence, follow these steps.

Understanding Customizable Campaign Influence

By allowing flexible revenue attribution across multiple campaigns, Customizable Campaign Influence offers better business intelligence, more marketing accountability, and improved alignment between sales and marketing.

> **Note:** This information applies only to Customizable Campaign Influence and not to the original version of Campaign Influence.

Customizable Campaign Influence lets you set up multiple ways of tracking the influence your campaigns have on opportunities. For each method you want to use, create a separate campaign influence attribution model. To give credit to a campaign for the opportunities it helps generate, your marketing and sales users can add campaign influence records manually. Alternatively, you or your partners can create triggers and processes to add records automatically. On campaign detail pages, your users can see the opportunities generated by a campaign, and the total revenue generated.

Campaign Attribution Models

Customizable Campaign Influence includes a default Salesforce revenue attribution model. The Salesforce model attributes 100% revenue credit to the primary campaign on an opportunity and 0% to any other campaigns that users assign to the opportunity. If you'd like to have more flexibility in how revenue is attributed to campaigns, you or your partners can create custom attribution models.

For example, you could create a model that evenly distributes credit for an opportunity across all campaigns that touched it. You could also create a model that gives 100% credit to the first or last campaign that touched an opportunity. With Customizable Campaign Influence, you can create a model for virtually any scenario that suits your business.

If you'd like to prevent your sales or marketing users from adding or editing campaign influence records, you can lock any of your attribution models. Records for locked models can only be updated via the API. The default Salesforce model is always locked.

Campaign Influence Records

Campaign influence records show which campaigns have influenced a specific opportunity. To let users see which campaigns contributed to their opportunities, add the Campaign Influence related list (1) to your Opportunity page layouts. The Campaign Influence related list only displays records for the attribution model you designate as the primary model in Setup. To let your users add and edit campaign influence records from their opportunity detail pages, keep the primary model unlocked. Your other attribution models can accrue campaign influence records, but only via triggers, processes, and the API.

Depending on your business needs, you can add custom fields to your campaign influence records. For example, if you want to track the order in which campaigns contributed to an opportunity, you could add a number field for that purpose.

Campaign Results

Your users can clearly see how many opportunities a campaign has generated when you add the Influenced Opportunities (1) related list to your Campaign page layouts. The records in the related list are based on the campaign influence model assigned as the primary model by the admin.
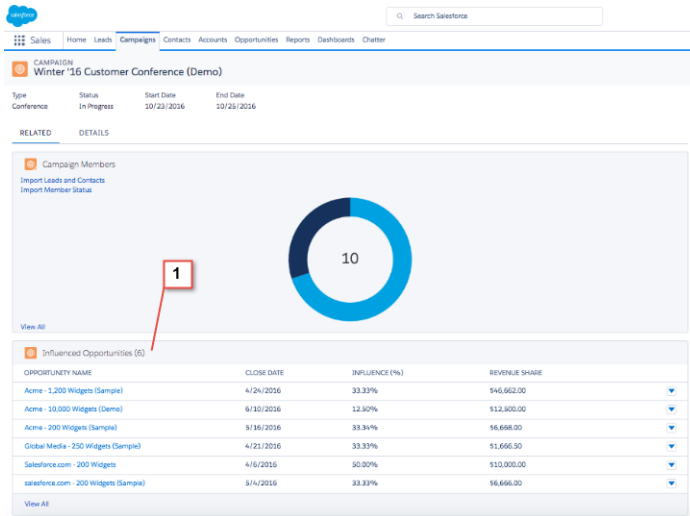
The Campaign Statistics section (1) of Campaign detail pages shows the revenue generated by the campaign, based on the attribution percentage on the campaign's influence records. The Campaign Statistics section also displays the current number of opportunities generated by the campaign and the total number won.
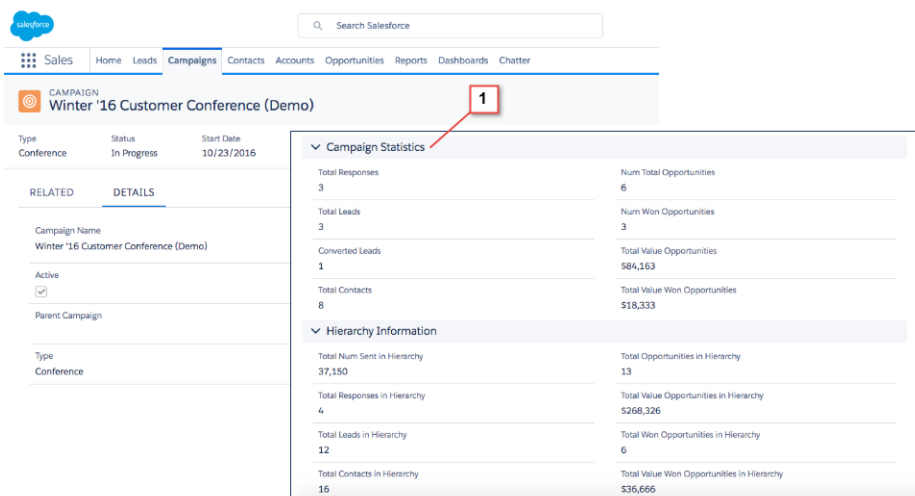
What's the Difference Between Campaign Influence and Customizable Campaign Influence?

Customizable Campaign Influence includes several capabilities not found in the original version of Campaign Influence.

> 📝 **Note:** This information applies only to Customizable Campaign Influence and not to the original version of Campaign Influence.

Feature	Campaign Influence	Customizable Campaign Influence
Salesforce Default Model (attributes 100% of revenue to the primary campaign on an opportunity)	✔	✔

Feature	Campaign Influence	Customizable Campaign Influence
Auto-association with opportunities	✔	✔
Multiple Attribution Models		✔
Flexible Influence Attribution		✔
Locked Models		✔
Campaign Influence on Opportunities per Model	✔	✔
Influenced Opportunities on Campaigns per Model		✔
Campaign Results on Campaigns per Model		✔
API Access		✔

Configure Customizable Campaign Influence

To set up and deploy Customizable Campaign Influence, follow these steps.

📝 **Note:** This information applies only to Customizable Campaign Influence and not to the original version of Campaign Influence.

IN THIS SECTION:

Set Up Customizable Campaign Influence

Allow your marketing department to attribute revenue across multiple campaigns when you enable Customizable Campaign Influence.

Enable Users for Customizable Campaign Influence

Be sure the sales and marketing users who plan to use Customizable Campaign Influence have the Sales User permission set assigned with the Campaign Influence permission enabled.

Add Customizable Campaign Influence to Page Layouts

Let your marketing users see the campaigns that influence each opportunity and the results of each campaign.

Create a Custom Campaign Influence Model

To implement a custom influence attribution model, first add a model in Setup with a few clicks. Then create a set of triggers and processes that add campaign influence records and assign them to the model. Work with partners if you want help implementing your model.

Designate a Primary Campaign Influence Model

Change which of your campaign influence models displays data on opportunity and campaign detail pages.

Lock a Campaign Influence Model

Prevent users from adding or editing campaign influence records for a campaign influence model by locking the model. Locked models can only be accessed via the API.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Set Up Customizable Campaign Influence

Allow your marketing department to attribute revenue across multiple campaigns when you enable Customizable Campaign Influence.

📝 **Note:** This information applies only to Customizable Campaign Influence and not to the original version of Campaign Influence.

1. From Setup, enter `Campaign Influence` in the **Quick Find** box and then click **Campaign Influence Settings**.

2. Select **Enabled**.

3. If you currently use the original version of Campaign Influence, choose whether to migrate your existing campaign influence records with 0% influence attribution to the new Salesforce model in Customizable Campaign Influence.

   To avoid migrating these records, click **Only migrate Campaign Influence records for the primary campaign on opportunities**.

4. Under Salesforce Model Settings, choose whether to enable or disable campaign auto-association. Auto-association is enabled for the Salesforce attribution model by default and is only available for the Salesforce model.

   Auto-association adds campaigns to opportunities automatically when the contact on an opportunity is also a member of a campaign. The contact listed on the opportunity must also be assigned a contact role on the opportunity before its close date.

5. Optionally, constrain campaign auto-association by limiting the number of days that can pass between when a contact is added to a campaign and an opportunity's creation date.

   For example, to prevent a campaign from being auto-associated with an opportunity when the opportunity is created more than 90 days after the contact was added to the campaign, enter `90`.

6. Optionally, define additional filter criteria that must be met in order for a campaign to be automatically associated with an opportunity.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up Customizable Campaign Influence:

- "Customize Application" and Sales Cloud or CRM permission set license

Enable Users for Customizable Campaign Influence

Be sure the sales and marketing users who plan to use Customizable Campaign Influence have the Sales User permission set assigned with the Campaign Influence permission enabled.

📝 **Note:** This information applies only to Customizable Campaign Influence and not to the original version of Campaign Influence.

1. Add the Sales User permission set to user profiles assigned to users who plan to track campaigns that influence opportunities.

2. In the Sales User permission set, enable the Campaign Influence permission.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To assign permission sets:
- "Customize Application"

Add Customizable Campaign Influence to Page Layouts

Let your marketing users see the campaigns that influence each opportunity and the results of each campaign.

> **Note:** This information applies only to Customizable Campaign Influence and not to the original version of Campaign Influence.

- Add the Campaign Influence related list to Opportunity page layouts.

  This related list shows the campaigns that have touched the opportunity. Only campaign influence records from your primary influence model appear in the list.

- Add the Influenced Opportunities related list to Campaign page layouts.

  This related list shows the opportunities influenced by the campaign. Only campaign influence records from your primary influence model appear in the list.

- Add the Campaign Results section to Campaign page layouts.

  The Campaign Results section shows the total amount brought in by the campaign, based on your primary campaign influence model.

Create a Custom Campaign Influence Model

To implement a custom influence attribution model, first add a model in Setup with a few clicks. Then create a set of triggers and processes that add campaign influence records and assign them to the model. Work with partners if you want help implementing your model.

> **Note:** This information applies only to Customizable Campaign Influence and not to the original version of Campaign Influence.

1. From Setup, enter `Model Settings` in the **Quick Find** box, and then click **Model Settings**.

2. Click **New Attribution Model**.

3. Enter a name for the model.

4. To make this model the primary model, select **Is Model Primary**.

   Only campaign influence records for the primary model appear in the Campaign Influence related list on opportunities. Records from the primary model also appear in the Influenced Opportunities Related list and Campaign Statistics section on campaigns.

5. To prevent users from adding, editing, or deleting campaign influence records for this model on campaign detail pages, select **Is Model Locked**.

   Records for locked models can only be created and updated via the API.

6. Optionally, enter a description for the model.

7. Click **Save**.

Designate a Primary Campaign Influence Model

Change which of your campaign influence models displays data on opportunity and campaign detail pages.

📝 **Note:** This information applies only to Customizable Campaign Influence and not to the original version of Campaign Influence.

1. From Setup, enter `Model Settings` in the **Quick Find** box, and then click **Model Settings**.

2. Click **Edit** next to the model you want to designate as the primary model.

3. Click **Is Model Primary**.

4. Click **Save**.

Lock a Campaign Influence Model

Prevent users from adding or editing campaign influence records for a campaign influence model by locking the model. Locked models can only be accessed via the API.

📝 **Note:** This information applies only to Customizable Campaign Influence and not to the original version of Campaign Influence.

1. From Setup, enter `Model Settings` in the **Quick Find** box, and then click **Model Settings**.

2. Click **Edit** next to the model you want to lock.

3. Click **Is Model Locked**.

4. Click **Save**.

Campaign Influence 1.0

Use the original version of Campaign Influence to understand the return on your campaign investments.

> 📝 **Note:** This information applies only to the original version of Campaign Influence and not to Customizable Campaign Influence.

IN THIS SECTION:

Configure Campaign Influence

Let Users View Influential Campaigns on Opportunities

Associate multiple influential campaigns to a single opportunity.

Configure Campaign Influence

> 📝 **Note:** This information applies only to the original version of Campaign Influence and not to Customizable Campaign Influence.

Setting up Campaign Influence

You can configure influential campaigns to be automatically added to opportunities. When automatic association is enabled, influential campaigns are added to opportunities when a campaign is related to a contact that is assigned a contact role on an opportunity prior to the close date of the opportunity. For example, if you have an email campaign with a member who is assigned a contact role on an open opportunity, the email campaign will be added to the Campaign Influence related list for that opportunity.

You can set a Campaign Influence Time Frame that specifies the maximum number of days between the campaign first associated date and the opportunity created date, during which a campaign is considered influential. For example, if you specify a Campaign Influence Time Frame of 15 days and one of your contacts becomes a member of a campaign on June 1, the campaign is considered influential to any opportunity that is created and associated with the contact by June 15. Use the association rules to configure additional criteria that campaigns must meet to be automatically associated to an opportunity.

When automatic association is disabled, users must manually add influential campaigns to opportunities using the Campaign Influence related list.

To set up automatic association for campaign influence:

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

2. Select `Enabled`.

3. In the `Campaign Influence Time Frame` field, optionally specify the maximum number of days between the campaign first associated date and the opportunity created date.

   > 📝 **Note:** Campaigns associated to a contact prior to this time frame will not be considered influential. The maximum campaign influence time frame is 9,999 days. If you do not want to specify a campaign influence time frame, leave the `Campaign Influence Time Frame` field blank.

4. Optionally, define additional filter criteria that must be met in order for a campaign to be automatically associated.

5. Click **Save**.

Campaigns will be automatically added to the Campaign Influence related list on opportunities when they meet the criteria you specified.

To disable automatic association for campaign influence:

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

2. Select `Disabled`.

3. Click `Save`.

Let Users View Influential Campaigns on Opportunities

Associate multiple influential campaigns to a single opportunity.

📝 Note: This information applies only to the original version of Campaign Influence and not to Customizable Campaign Influence.

If enabled, automatic association will add influential campaigns to opportunities when the campaign is related to a contact that is assigned a contact role on the opportunity prior to the opportunity close date. You can specify additional automatic association criteria, including a campaign influence time frame that limits the amount of time a campaign can influence a new opportunity after the campaign first associated date and before the opportunity created date. Influential campaigns can also be added to opportunities manually by clicking the **Add Campaign** button in the Campaign Influence related list.

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

2. Add the Campaign Influence related list to the opportunities page layout.

3. Set up campaign influence.

Manage Currencies

Manage Multiple Currencies

Your organization can set up the ability to use multiple currencies in opportunities, forecasts, quotes, reports, and other data.

1. Enable multiple currencies for your organization.

2. To designate your corporate currency, from Setup, enter `Manage Currencies` in the `Quick Find` box, then select **Manage Currencies**, and then click **Change Corporate**.

3. To activate more currencies for your organization, click **New** in the Active Currencies related list.

4. To use dated exchange rates, enable advanced currency management.

5. Set conversion rates for new currencies. See Edit Conversion Rates. If you have enabled advanced currency management, see Editing Dated Exchange Rates on page 218.

Using Multiple Currencies

International organizations can use multiple currencies in opportunities, forecasts, reports, quotes, and other currency fields. The administrator sets the "corporate currency," which reflects the currency of the corporate headquarters. The administrator also maintains the list of active currencies and their conversion rates relative to the corporate currency. The active currencies represent the countries in which the organization does business. Only active currencies can be used in currency amount fields.

Each user has a personal currency, which is used as the default currency in quotas, forecasts depending on which forecasting version you use, opportunities, quotes, and reports. Users can also create opportunities and enter amounts using other active currencies.

All standard and custom object records with currency fields have a field that specifies the currency to use for all amount fields in that record. (Click **Edit** to display this editable `Currency` field on a record.) For example, you can set the `Account Currency` to "USD-U.S. Dollars" so that the `Annual Revenue` shows in dollars for one of your American accounts. All currency amounts are displayed in the default currency of the record. Administrators can choose whether to also display, in parentheses, the user's personal currency if it is different from the currency of the record. When you change the default currency of a record, currency amounts are not converted. They just display the new currency code.

> **Note:** If your organization uses advanced currency management, the opportunity close date determines which conversion rate to use when displaying currency amounts.

Depending on the forecasting version you have, forecast currency amounts are converted to the user's personal currency. Additionally, for managers, their team's opportunities, forecasts, quotes, and other data are converted and rolled up to the manager's personal currency. The manager can also drill down to see the data in the native currency. All conversion and roll-ups happen automatically.

Amounts in reports are shown in their original currencies, but can be displayed in any active currency. You can change the currency used for report totals by selecting a currency from **Show** > **Currencies**. The default value is your personal currency. For any amount, you can choose to display the Converted column—for example, `Annual Revenue Converted`—which shows amounts in the currency you select.

Custom formula fields are not tied to any particular currency. If the result of a formula field is a currency amount, it displays in the currency of the associated record. This rule is also true for cross-object formulas that reference merge fields with different currencies, and formulas in workflow rules and approval processes. However, workflow rules and approval processes that use filters instead of formulas convert all currency values to the corporate currency.

If currency fields are referenced in Apex, you can't disable multiple currencies for your organization. For example, if Apex code references the `Account Currency` field (represented as `CurrencyIsoCode` in the code), you can't disable multiple currencies.

SEE ALSO:

[Administrator setup guide: Using Multiple Currencies](#)

[Enable Multiple Currencies](#)

Enable Multiple Currencies

To enable multiple currencies in your organization:

1. Familiarize yourself with the [implications of enabling multiple currencies](#).

2. In Setup, enter `Company Information` in the `Quick Find` box, then select **Company Information** and click **Edit**. Ensure that your selected currency locale is the default currency that you want to use for current and future records. Enable **Allow Support to Activate Multiple Currencies**, and then save your changes.

   Note: This setting is used to verify the specific organization that's approved for multi-currency activation. It doesn't submit a request to Salesforce. Submit the request via your normal support process.

3. To enable multiple currencies, contact Salesforce. Be prepared to provide the following information.

   - The organization ID (production or sandbox)
   - Confirmation that you understand that your current currency locale will become the default currency stamp for current and future records (USD, EUR, GBP, and so on)
   - Confirmation that you understand that multiple currencies can't be disabled once enabled
   - Confirmation that you're a system administrator authorized on behalf of your organization to request multi-currency enablement
   - Confirmation that you consent to the lockout of this organization for a certain period, depending on your organization's data usage volume

     Note: For large organizations, multiple currencies are sometimes enabled over the weekend to avoid performance issues during the work week.

SEE ALSO:

[Implications of Enabling Multiple Currencies](#)

[Manage Multiple Currencies](#)

[About Advanced Currency Management](#)

Implications of Enabling Multiple Currencies

Enabling multiple currencies introduces permanent changes in your organization. Before proceeding, be aware of these implications to ensure a smooth transition for your organization.

- After enabled, multiple currencies can't be disabled for your organization.

- Work with your Salesforce representative to determine the best time for multi-currency enablement. The enablement process temporarily locks your organization, preventing all integration processing and user logins. The lockout duration depends on the data space used by your organization.

- Upon enablement, existing records are stamped with a default currency code that you provide in your enablement request. For example, if your organization contains records using USD and EUR, switch them all to the same default currency before enablement. Support for this type of conversion is also available as a Salesforce paid implementation service.

- Standard and custom objects, such as Account, Lead, Case, Opportunities, Opportunity Products, Opportunity Product Schedules, and Campaign Opportunities, have currency fields that support multiple currencies. Reports related to these objects and fields also support multiple currencies. By default, page layouts for these objects have multi-currency-compatible fields in which you can specify the currency for the record. Typically, these fields are available only when creating a record or editing an existing record. The selected currency is used for the primary amount field.

- After enablement, the primary currency displays as usual and, optionally, a secondary currency amount appears in parentheses. The primary currency is typically the default corporate currency, unless it's overridden at the record level. The amount shown in parentheses is the user's personal default currency, calculated based on the conversion rate settings defined in your organization. To control whether the converted currency amount appears, enable or disable parenthetical currency conversion from the Manage Currencies page.

- In reports, the primary currency reflects either the default corporate currency or the currency selected for the record. The secondary currency reflects the personal default currency of the user running the report, or the currency specified in the report criteria.

- Users can specify a personal default currency on their personal information page. If parenthetical currency conversion is enabled, the personal default currency displays as the secondary currency amount (converted amount). Changing the personal default currency updates the converted amount in real time.

- After a currency is added to an organization's list of supported currencies, it can't be deleted from the administrator's list of currencies, even when it's deactivated. The presence of inactive currencies in the administrator's list is a cosmetic issue that doesn't affect end users. A deactivated currency isn't visible to end users, but remains visible to administrators. Salesforce recommends that you keep this issue in mind during testing and use only those currencies that you eventually plan to use in your organization.

- After enablement, all currency fields display the ISO code of the currency before the amount. For example, $100 displays as USD 100.

  📝 Note: If you have only one currency in your multi-currency organization, you can set a preference to display currency symbols instead of ISO codes. To display currency symbols, search Setup for `User Interface`, and then select **Show currency symbols instead of ISO codes** in the Currency Display Settings section of the User Interface settings page. If you later enable more currencies in your organization, ISO codes display and this preference is no longer available. This preference applies only in the standard Salesforce user interface.

- By default, all converted amounts in your organization rely on the current conversion rates defined for your organization. Conversion rates must be set and updated manually. Changing the exchange rate automatically updates converted amounts on all records, including on closed opportunities.

  You can opt to use dated exchange rates by using advanced currency management to track historical exchange rates. Advanced currency management allows you to maintain a list of exchange rates by date range. Converted currency amounts on opportunities display based on the specified Close Date, regardless of the opportunity stage. If the Close Date changes to a different exchange rate period, changing the Close Date impacts converted amounts.

> **Note:** Dated exchange rates aren't used in forecasting, currency fields in other objects, or currency fields in other types of reports.

SEE ALSO:

Administrator setup guide: Using Multiple Currencies

Enable Multiple Currencies

Manage Multiple Currencies

About Advanced Currency Management

Activate and Deactivate Currencies

For orgs with multiple currencies, specify which currencies are supported by activating or deactivating currencies.

- **Active currencies** represent countries in which your org does business. Only active currencies can be entered in opportunities, forecasts, and other items. Once you activate a currency, you can never permanently delete it.
- **Inactive currencies** are currencies that your org no longer uses. You can have existing records that use inactive currencies, but you can't enter new amounts that use inactive currencies.

To activate new currencies:

1. From Setup, enter `Manage Currencies` in the `Quick Find` box, then select **Manage Currencies**.
2. Click **New** in the Active Currencies related list.
3. Select a currency. Currencies are alphabetized using their ISO currency code.
4. Enter the conversion rate relative to your corporate currency.
5. Specify the number of decimal places to display for amounts in this currency.
6. Click **Save**.

To activate a currency from the list of inactive currencies, click **Activate** next to the currency.

To deactivate a currency, click **Deactivate** next to the currency. You can't deactivate the corporate currency. Deactivating a currency does not alter amounts in items that use that currency. However, you can no longer enter new amounts using the inactive currency.

> **Note:** Deactivating a currency that is set as a user's personal currency automatically resets the user's currency to the corporate currency.

SEE ALSO:

Manage Multiple Currencies

Edit Conversion Rates

About Advanced Currency Management

Administrator setup guide: Using Multiple Currencies

About Advanced Currency Management

Advanced currency management allows you to manage dated exchange rates within opportunities using Salesforce. Dated exchange rates allow you to map a conversion rate to a specific date range. For example, the exchange rate on January 1 was 1 USD to 1.39 AUD, but on February 1, it changed to 1 USD to 1.42 AUD. Your opportunities that closed between January 1 and February 1 use the first exchange rate (1 = 1.39), while opportunities that closed after February 1 used the second exchange rate (1 = 1.42).

Dated exchange rates are defined using a start date and a conversion rate. Each rate is in effect until either the end of time or the day before the next start date for that currency. The time between one start date and the next start date is called the exchange rate date range. These ranges can be as small as a day and as large as all of time.

To enable or disable advanced currency management, see Enabling or Disabling Advanced Currency Management on page 216.

When advanced currency management is first enabled, your existing exchange rates automatically become the first set of dated exchange rates. These rates will be valid for all time, until you define another set of exchange rates. For more information, see Editing Dated Exchange Rates on page 218.

If you disable advanced currency management, all currency conversions will use the static conversion rate. See Edit Conversion Rates on page 217.

> **Note:** Although dated exchange rates aren't supported in Lightning Experience or Salesforce1, some limited functionality is available. Opportunities display the correct amount if the CloseDate field is on the page layout for opportunities. Because page layouts control who sees what on object records, only users who have this page layout assigned to them see the correct amount. Otherwise, the amount shown reflects the original amount before a dated exchange rate was applied.

Advanced Currency Management Considerations

- Dated exchange rates are used for opportunities, opportunity products, opportunity product schedules, campaign opportunity fields, opportunity splits, and reports related to these objects and fields. Dated exchange rates are not used in forecasting, currency fields in other objects, or currency fields in other types of reports.

- Organizations with advanced currency management support roll-up summary fields between two advanced currency management objects. For example, roll-up summary fields are supported from an opportunity line object to its opportunity object, because both are advanced currency management enabled. However, if you enable advanced currency management, you can't create roll-up summary fields that calculate currency on the opportunity object rolling up to the account object, and you can't filter on the opportunity currency field on the account object. All existing currency-related roll-up summary fields on the opportunity object are disabled and their values are no longer calculated. If your organization enables advanced currency management, you should delete any currency roll-up summary fields using opportunities and accounts or opportunities and custom objects.

- Campaign opportunity fields use dated exchange rates when calculating the amount in the campaign currency, but are not used when converting those amounts to the user currency.

- Cross-object formulas always use the static conversion rate for currency conversion.

- If advanced currency management is enabled, you can't bind Visualforce pages that use `<apex:inputField>` or `<apex:outputField>` components to currency fields that support advanced currency management.

SEE ALSO:

Manage Multiple Currencies

Activate and Deactivate Currencies

Administrator setup guide: Using Multiple Currencies

Enabling or Disabling Advanced Currency Management

To enable advanced currency management:

1. Enable multiple currencies for your organization. For more information, see Manage Multiple Currencies on page 211.

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

3. Click **Enable**.

4. When prompted, select `Yes, I want to enable Advanced Currency Management` and click **Enable**.

When advanced currency management is first enabled, your existing exchange rates automatically become the first set of dated exchange rates. These rates will be valid for all time, until you define another set of exchange rates.

To disable advanced currency management:

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

2. Click **Disable**.

3. When prompted, select `Yes, I want to disable Advanced Currency Management` and click **Disable**.

If you disable advanced currency management, all currency conversions will use the static conversion rate. See Edit Conversion Rates on page 217.

When advanced currency management is enabled, Visualforce `<apex:inputField>` and `<apex:outputField>` components cannot display currency fields.

SEE ALSO:

About Advanced Currency Management

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable advanced currency management:
- "Customize Application"

Edit Conversion Rates

You can manage static exchange rates between your active and inactive currencies and the corporate currency by editing the conversion rates. These exchange rates apply to all currency fields used in your organization. In addition to these conversion rates, some organizations use dated exchange rates for opportunities and opportunity products.

1. Search Setup for Manage Currencies.

2. If you use advanced currency management, click **Manage Currencies**.

3. In the Active Currencies or Inactive Currencies list, click **Edit Rates**.

4. Enter the conversion rate between each currency and your corporate currency.

5. Click **Save**.

When you change the conversion rates, currency amounts are updated using the new rates. Previous conversion rates are not stored. All conversions within opportunities, forecasts, and other amounts use the current conversion rate.

If your organization uses advanced currency management, you can also manage dated exchange rates for currency fields on opportunities and opportunity products.

> **Note:**
>
> - You cannot track revenue gain or loss based on currency fluctuations.
>
> - Changing conversion rates causes a mass recalculation of roll-up summary fields. This recalculation can take up to 30 minutes, depending on the number of records affected.
>
> - You can also change a conversion rate via the API. However, if another roll-up summary recalculation for the same currency field is in progress, the age of that job affects the recalculation job that you triggered. Here's what happens when you request a currency rate change via the API, and a related job is in progress.
>
>   – If the other recalculation for the same currency field was kicked off less than 24 hours ago, your currency rate change isn't saved. You can try again later or instead change the currency rate from Manage Currencies in Setup. Initiating the change from Setup stops the old job and triggers your recalculation to run.
>
>   – If the other recalculation job was kicked off more than 24 hours ago, you can save your currency rate change and your job starts.
>
> To check the status of your recalculation job, see the Background Jobs page in Setup.

SEE ALSO:

Manage Multiple Currencies

Activate and Deactivate Currencies

Administrator setup guide: Using Multiple Currencies

Editing Dated Exchange Rates

To add new dated exchange rates:

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

2. Click **Manage Dated Exchange Rates**.

3. Click **New Exchange Rates**.

4. Enter the date that the exchange rates go into effect.

5. Enter the exchange rates.

   📝 Note: The exchange rates will default to the current exchange rate. If you do not want to set a new exchange rate for a currency, delete the exchange rate (leave the field blank).

6. Click **Save** to save the new dated exchange rates.

To view existing dated exchange rates:

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

2. Click **Manage Dated Exchange Rates**.

3. Select the date range you want to view either by entering the date and clicking **Go!**, or by selecting **Previous Range** or **Next Range**.

To delete a dated exchange rate for a particular currency:

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

2. Click **Manage Dated Exchange Rates**.

3. Click the name of the currency you want to edit.

4. Click **Del** for the date range you want to delete.

   If the date range you want is not displayed, enter it in the `Show all rates with start dates between` fields and click **Go!**.

To edit your dated exchange rates for a particular currency:

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

2. Click **Manage Dated Exchange Rates**.

3. Click the name of the currency you want to edit.

4. Click **Edit** for the date range you want to edit. If the date range you want is not displayed, enter it in the `Show all rates with start dates between` fields and click **Go!**.

5. Edit the exchange rate, setting it to the new value for the date range, and click **Save**.

SEE ALSO:

About Advanced Currency Management

Manage Multiple Currencies

Activate and Deactivate Currencies

Administrator setup guide: Using Multiple Currencies

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view currencies:
- "View Setup and Configuration"

To change currencies:
- "Customize Application"

Enable and Customize Quotes

Enable Quotes

Make it easy for your sales reps to show your customers the prices of the products and services that your company offers.

1. From Setup, enter `Quote` in the `Quick Find` box, then select **Quote Settings** (Lightning Experience) or **Quotes Settings** (Salesforce Classic).

2. Select the option for enabling quotes.

3. To display the Quotes related list on the standard opportunity page layout, select `Opportunity Layout`.

4. To add the Quotes related list to all opportunity page layouts that users have customized, select `Append to users' personal related list customization`.

5. Save your changes.

   Note: You can't disable the Quotes feature if:

   - Your records have any references to quotes, quote line items, or quote PDFs from any application customizations, including formula fields, triggers, workflow rules, and approval processes. Remove these references before you try to disable the feature.

   - Any quote is synced with an opportunity. On each synced quote's detail page, choose to stop syncing before you try to disable the feature.

Quote Templates

Quote templates let you customize the way your sales reps quote your company's products and services. Sales reps can select standard or customized quote templates from their quote records, generate quote PDFs, and email them to customers.

IN THIS SECTION:

Considerations for Creating Quote Templates

Before you create a quote template, consider a few key points.

Create, Preview, and Activate Quote Templates

Define the look of your company's quote PDFs by creating templates that your sales reps can choose when they create quote PDFs.

Enhance Quote Templates

After you create a quote template, add features to enhance it.

Quote Template Fields

If you're working with quote templates, review details about quote template fields.

Considerations for Adding Images to Quote Templates

Before you add images to quote templates, consider a few key points.

Considerations for Creating Quote Templates

Before you create a quote template, consider a few key points.

- Quote PDFs don't support right-to-left languages. The text aligns to the left side of the page.

- Text formatting isn't available in the `Text/Image Field` for Unicode languages such as Arabic and Japanese. To make these languages visible in plain text, contact Salesforce and ask to enable the feature for foreign character support for rich text area fields in Quote PDFs.

- Advanced Currency Management isn't available with quotes.

- The maximum number of characters that you can use in the quotes template `Text/Image Field` is 32,000. This number includes the hidden HTML characters that are used to format text.

- Sometimes a field doesn't appear on the quote templates palette or on a PDF that's created from a template.

  - If the default value for the field exceeds 255 characters, quote templates can't include text areas or text fields.

  - If a user can't view or update a field because of field-level security settings, that field doesn't appear on PDFs that are created from a template, even if the template includes that field. Read-only fields appear on PDFs.

  - Fields that appear on a quote page layout but don't contain data for a given quote appear on the quote templates palette but not when a PDF is created.

  - Quote line item fields that don't contain data don't appear as columns in a list when a PDF is created, even if the template includes that field. For example, if no quote line items offer a discount, the `Discount` column doesn't appear, even if the list includes the `Discount` field.

  - If a related list isn't included on a quote page layout, it doesn't appear on the template palette or any PDFs for quotes that use that page layout.

  - If the currency of a product on an opportunity differs from the user's currency in a multicurrency org, currency fields for quotes and quote line items appear in both currencies. The product's currency is converted to the user's currency, and the converted amount appears in parentheses. Fields in quote custom reports appear in the report's currency. Currency fields include `Subtotal`, `Tax`, and `Grand Total`.

  - If you create a Developer or Developer Pro sandbox, templates that contain `Text/Image` fields can't be opened for editing within the sandbox.

- Fields within sections have different alignment than columns within lists, so if you place a totals section below a list, its field values won't align directly below the right-hand list values. For example, say your template includes a list of quote line items, including a Total Price column at the far right that shows the total for each line item. If you add a totals section beneath the list, and you include `Subtotal`, `Total Price`, and `Grand Total` fields, their values will show the total of all line items, but the amounts won't align directly below the list's Total Price column.

SEE ALSO:

Create, Preview, and Activate Quote Templates

Create, Preview, and Activate Quote Templates

Define the look of your company's quote PDFs by creating templates that your sales reps can choose when they create quote PDFs.

Watch a Demo: ▶ Creating Quote Templates (Salesforce Classic)

1. From Setup, enter *Templates* in the `Quick Find` box, then select **Quote Templates** (Lightning Experience) or **Templates** under Quotes (Salesforce Classic).

2. Click **New**, and then select a template, such as *Standard Template*, on which to base your new template.

3. Give your new template a name, and then click **Save**.

4. In the template editor, drag the elements that you want to the template, and then complete the details. To add:

   - One or more Quote fields or fields from related objects, use a section and add fields to it.

   - Text that you can edit and format, such as terms and conditions, use `Text/Image Field`.

   - An image, such as your company logo, use `Text/Image Field`.

   - A table of Quote fields or fields from a different object, such as Quote Line Item, use a list.

5. Click **Quick Save** to save your changes and continue working on the template.

6. Click **Save and Preview** to make sure that the quote PDFs that users create look the way you want them to.

   Preview shows templates in system administrator profile view. The preview and the template show the rich text and images that you've added. Other data is simulated.

   🛑 Important: **Save and Preview** saves changes to your template, so after you preview, you can't undo them.

7. Click **Save** when you're finished.

8. Return to the Quote Templates page, and then click `Activate`.

SEE ALSO:

    Enhance Quote Templates

    Quote Template Fields

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS

To create quote templates:
- "Customize Application"

To view quote templates:
- "View Setup and Configuration"

Enhance Quote Templates

After you create a quote template, add features to enhance it.

IN THIS SECTION:

Add Rich Text to a Quote Template

Include text that you can format, such as your company's address or terms and conditions, in your quote template's body, header, or footer.

Add a List to a Quote Template

Arrange and display fields from a quote line item or any other standard or custom object that has a lookup relationship to the quote object. The added list looks like a table, with field names appearing as columns.

Add an Image to a Quote Template

Show an image, such as your company logo, in your quote template's body, header, or footer.

Add a Totals Section to a Quote Template

Include subtotal and grand total amounts for your quote.

Add a Signature Block to a Quote Template

Create signature and date lines so that customers can easily sign off on their quotes.

Guidelines for Using the Quote Templates Editor

While you're creating and editing quote templates, refer to key guidelines for additional information.

Add Rich Text to a Quote Template

Include text that you can format, such as your company's address or terms and conditions, in your quote template's body, header, or footer.

1. Drag `Text/Image Field` into place in the header, the footer, or any section in the body.

2. Type or paste your text into the field.

3. Format the text as needed.

4. Click **OK**.

SEE ALSO:

Guidelines for Using the Quote Templates Editor

Add an Image to a Quote Template

Enhance Quote Templates

Add a List to a Quote Template

Arrange and display fields from a quote line item or any other standard or custom object that has a lookup relationship to the quote object. The added list looks like a table, with field names appearing as columns.

A list can include up to 10 fields.

> 📝 **Note:** You can't add lists to the header or footer of your quote template.

1. Drag a list from the palette to the template.

2. Enter a title for the list. To suppress the title from appearing on the template or PDF, select **Hide Title**.

3. In the `Object` field, select the object whose fields you want to appear in the list.

4. Use the **Add** and **Remove** arrows to move columns from the Available Fields list to the Selected Fields list. Use the **Up** and **Down** arrows to change the order of the columns.

5. Click **OK**.

SEE ALSO:

Guidelines for Using the Quote Templates Editor

Enhance Quote Templates

Add an Image to a Quote Template

Show an image, such as your company logo, in your quote template's body, header, or footer.

Before you begin, review key considerations.

Insert an Uploaded Image

1. To use an image that's stored in Salesforce CRM Content, locate the image, and then download it to your local file directory.

2. Drag `Text/Image Field` into place in the header, the footer, or any section in the body.

3. Click the image icon, click **Choose File**, and then select the image in your file directory.

4. Click **Open** and then **Insert**.

   The image appears in the field. To resize it, drag the sizing handles, which show the image's height and width in pixels.

5. Click **OK**.

6. To see how the image looks in PDFs that are created from the template, click **Save and Preview**.

7. To suppress the title from appearing on the template or PDF, select **Hide Title** in Section Properties.

Insert an Image from a Salesforce Web Address

1. If you need to, upload the image to the Documents tab, or define a static resource.

2. Drag `Text/Image Field` into place in the header, the footer, or any section in the body.

3. To suppress the title from appearing on the template or PDF, select **Hide Title**.

4. Click **OK**.

5. On the Documents tab or the Static Resources page, open the image's detail page, click **View File**, and then copy its URL.

6. In the quote template editor, click 🔧 in the title bar of `Text/Image Field`.

7. Click the image icon, and then click the Web Address tab.

8. Paste the URL into the URL field, and then click **Insert**.

   The image appears in the field. You can resize it by dragging the sizing handles, which show the image's height and width in pixels.

9. Click **OK**.

10. To see how the image looks in PDFs that are created from the template, click **Save and Preview**.

   ⊘ **Important:** If the image is removed from the Documents tab or Static Resources page where it's stored, the template displays a message that the image isn't available. Restore the image, open the template, delete the error message image, and then paste the URL again.

SEE ALSO:

   Guidelines for Using the Quote Templates Editor

   Enhance Quote Templates

Add a Totals Section to a Quote Template

Include subtotal and grand total amounts for your quote.

1. Do either of the following.

   a. Select *Standard Template* when you create a template, and then modify the totals section as needed.

   b. Drag a section onto the layout of any template, and then drag total-related fields (such as `Subtotal` and `Grand Total`) to the right half of the section. If you're placing the section directly below a list, hide the title.

2. Click 🔧 , and then select right field alignment.

3. Save your changes.

SEE ALSO:

   Guidelines for Using the Quote Templates Editor

   Enhance Quote Templates

Add a Signature Block to a Quote Template

Create signature and date lines so that customers can easily sign off on their quotes.

1. Drag `Text/Image Field` into the footer of your template. To right-align your signature block, or to create two signature blocks, use two columns.

2. Enter a label for each line that you want to create. For example, enter *Signature*, *Name*, *Title*, or *Date*.

3. To create a line where the customer can sign or write other information, press and hold the underscore key.

4. Click **OK**.

5. Save your changes.

SEE ALSO:

Guidelines for Using the Quote Templates Editor

Enhance Quote Templates

Guidelines for Using the Quote Templates Editor

While you're creating and editing quote templates, refer to key guidelines for additional information.

General Guidelines

- Click ⊡ beneath the palette at the top to expand or collapse it.
- In the left column, select an object to display its fields on the palette.
- Use `Quick Find` to easily locate items on the palette.
- To add an element to the template, drag it from the palette to the layout.
- To remove an element from the layout, drag it back to the palette, or hover over its title bar and click ⊖.
- For any section (including a header or footer), double-click its title bar or click 🔧 to:
  - Hide the section title.
  - Hide field labels. (Field names appear in gray in the quote template editor, but they don't appear on quote PDFs.)
  - Change the number of columns (one or two).
  - Adjust field alignment.
- To rename the template, click **Quote Template Properties**.
- To show field content without labels in quote template sections, headers, and footers, click 🔧, and then select the `Hide` checkbox.
- Use the Blank Space field to add vertical space anywhere on the template. Each Blank Space field adds five pixels of vertical space to the quote PDF.

  📝 Note: The space in the quote template preview doesn't look the same as the space in the quote PDF.

Guidelines for Using Headers and Footers

A header or footer is essentially a section. You can add fields to it and show or hide its title. You can't remove a header or footer or add more sections to it.

- In the quote template editor, select an object, and then drag the fields that you want to the header or footer.

- To use an image, such as your company logo, or include extended information, such as terms and conditions, use `Text/Image Field`.

- To change the number of columns in your header or footer, click 🔧, and then select the number (one or two) that you want.

  - To display an image that spans the width of a page, use a one-column header or footer.

  - For terms and conditions text, use a one-column footer.

- To change field alignment within a column, click 🔧, and then select left or right alignment.

- To hide field labels, click 🔧, and then select the `Hide` checkbox.

SEE ALSO:

Enhance Quote Templates

Quote Template Fields

If you're working with quote templates, review details about quote template fields.

📝 Note: To help you understand the information that you'll get when you select fields for your template, the Template Field Name column in the following table provides additional information that doesn't appear on PDFs that are created from the template.

Object	Object Field	Template Field Name	PDF Field Name
User	`First Name, Last Name`	`Prepared By (Name)`	`Prepared By`
User	`Email`	`Prepared By (Email)`	`E-mail`
User	`Phone`	`Prepared By (Phone)`	`Phone`
User	`Fax`	`Prepared By (Fax)`	`Fax`
Company Information	`Address`	`Organization (Address)`	`Company Address`
Quote Documents	Hidden. The date when the PDF was generated and saved in the quote documents object.	`Quote PDF (Created Date)`	`Created Date`

SEE ALSO:

Create, Preview, and Activate Quote Templates

Considerations for Adding Images to Quote Templates

Before you add images to quote templates, consider a few key points.

- You can store images for uploading in your file system or in Salesforce CRM Content.
- If you store images on the Documents tab or the Static Resources page, you get a web address that you can use to insert the image.
- If you insert an image that's too large, it's cropped when users create quote PDFs from the template. To prevent cropping, click **Save and Preview** after you insert an image, and then resize the image as needed.
- To insert an image from a *public* web address outside the Salesforce application (such as your company's website), contact Salesforce and ask to have the public URL whitelisted for your Salesforce org.

SEE ALSO:

[Add an Image to a Quote Template](#)

Quotes Fields

If you're troubleshooting quotes or working with custom fields, review the details about quote fields.

These tables list the fields that make up a quote. Your page layout, field-level security settings, and Salesforce edition determine what fields are visible and editable. (Field-level security is available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.)

> **Note:** If the currency of a product on an opportunity differs from the user's currency in a multicurrency org, currency fields for quotes and quote line items appear in both currencies. The product's currency is converted to the user's currency, and the converted amount appears in parentheses. Fields in quote custom reports appear in the report's currency. Currency fields include `Subtotal`, `Tax`, and `Grand Total`.

Field	Description
Account Name	The name of the account that the quote's opportunity is linked to. (Read only.)
Additional To	Another address field. By default not displayed on the page layout.
Additional To Name	The name of the person or company that's associated with the additional address.
Bill To	The billing address for the account that's associated with the quote.
Bill To Name	The name of the person or company that the quote is billed to.
Contact Name	The name of the contact that's associated with the quote. By default, this contact is the primary contact on the opportunity.

Field	Description
Contract	The contract that's associated with the quote.
Created By	The user who created the quote, including the creation date and time. (Read only.)
Description	The description of the quote, or notes to help you differentiate between quote versions.
Discount	The weighted average of all line item discounts on the quote. Can be any positive number up to 100. (Read only.)
Email	The email address of the contact who's associated with the quote. If available, automatically completed when you add a contact.
Expiration Date	The date when this quote is no longer valid.
Fax	The fax number for the contact who's associated with the quote. If available, automatically completed when you add a contact.
Grand Total	The total price of the quote plus shipping and taxes. (Read only.)
Last Modified By	The user who most recently changed the quote, including the modify date and time. (Read only.)
Line Items	The number of line items on the quote.
Opportunity Name	The name of the opportunity that's associated with the quote. (Read only.)
Phone	The phone number of the contact who's associated with the quote. If available, automatically completed when you add a contact.
Quote Name	The quote's name.
Quote Number	A system-generated number that identifies the quote. (Read only.)
Quote To	The address to send the quote to for approval, such as the address of a third-party agency that represents a buyer. By default not displayed on the page layout.
Quote To Name	The name of the entity (such as a person or business) that the quote is sent to for approval.
Record Type	The name of the field that determines what picklist values are available for the record. The record type can be associated with a sales process. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.
Shipping and Handling	The total shipping and handling costs for the quote.
Ship To	The shipping address for the account that's associated with the quote.
Ship To Name	The name of the entity (such as a person or company) that the quote line items are shipped to.
Status	The status of the quote. The standard options are: • —None— • Draft • Needs Review

Field	Description
	• In Review
	• Approved
	• Rejected
	• Presented
	• Accepted
	• Denied
	Your admin determines which status is the default for new quotes and which statuses allow you to email a quote PDF.
Subtotal	The total of the quote line items before discounts, taxes, and shipping are applied. (Read only.)
Syncing	Whether the quote syncs with its associated opportunity. (Read only.)
Tax	The total taxes for the quote.
Total Price	The total of the quote line items after discounts and before taxes and shipping. (Read only.)

Quote Line Item Fields

Field	Description
Created By	The user who created the line item, including creation date and time. (Read only.)
Date	The service date, effective date, or other date for the product.
Discount	The discount that you apply to the line item. You can enter a number with or without the percent symbol. You can use up to two decimal places.
Last Modified By	The user who most recently changed the line item, including the modify date and time. (Read only.)
Line Description	The description of the product in the line item.
Line Item Number	A system-generated number that identifies the line item. (Read only.)
List Price	The price of the product within the price book, including currency. (Read only.)
Product	The name of the line item product as listed in the price book. (Read only.)
Product Code	The internal code or product number that's used to identify the product.
Quantity	The number of units of this line item's product included in the quote. The value must be one or greater. If a quote is synced with an opportunity, this field is updated from the quote line item to the opportunity product. If you use forecasting for your opportunities, this field also appears in the Products list on the Opportunity Forecast Edit page, depending on which forecasting version you use.
Quote Name	The name of the quote that the line item is for.

Field	Description
Sales Price	The price that you want to use for the product. Initially, the sales price for a product on an opportunity or quote is the product's list price from the price book, but you can change it here. If a quote is synced with an opportunity, this field is updated from the quote line item to the opportunity product. If you use forecasting for your opportunities, this field also appears in the Products list on the Opportunity Forecast Edit page, depending on which forecasting version you use.
Schedule	Whether the line item uses schedules in the opportunity. Default schedules aren't carried over from the opportunity when opportunity products are copied to a quote.
Subtotal	The line item's sales price multiplied by the quantity.
Total Price	The line item's sales price multiplied by the quantity and minus the discount.

Customize Options for Contracts

Customize Contracts

Customize Salesforce to handle your internal contract management process.

To access the Contract Settings page, from Setup, enter `Contract Settings` in the `Quick Find` box, then select **Contract Settings**.

Enable Contract Expiration Notices

Send email notifications to account and contract owners when a contract expires.

1. Select **Send Contract Expiration Notice Emails to Account and Contract Owners**, and then save your changes.

2. To stop sending expiration notices, deselect this option, and then save your changes.

Enable Auto-Calculation of Contract End Dates

To automatically calculate contract end dates, select **Auto-calculate Contract End Date**, and then save your changes.

> **Note:**
> - If Salesforce automatically calculates a contract end date, it doesn't appear on the contract's edit page.
> - If Auto-calculate Contract End Date is enabled, and Contract Start Date or Contract Term is blank, Contract End Date is blank.

Disable Auto-Calculation of Contract End Dates

If your contracts don't have end dates, or if you prefer to let your sales team enter them manually, disable auto-calculation of contract end dates.

1. Deselect **Auto-calculate Contract End Date**, and then save your changes.

2. View your page layout and field-level security settings for Contract End Date, Contract Start Date, and Contract Term to verify that your sales team can read and edit them as needed.

Track History for All Statuses

The default is to track history for contracts with a status of In Approval Process or Activated.

To track history for contracts for all statuses, select **Track History for All Statuses**, and then save your changes.

Show a Contract on Opportunity or Quote Details

To show a contract on the opportunity or quote details, use field-level security and field accessibility.

1. From Setup, enter *Object Manager* in the Quick Find box, then select **Object Manager**.

2. In the object management settings for opportunities or quotes, click **Contract** in the fields area.

3. Click **Set Field-Level Security**.

4. Select **Visible** for each profile that you want to see contracts on opportunity or quote details, and then save your changes.

5. Click **View Field Accessibility**.

6. If any profile is marked hidden, click **Hidden**, and then select **Visible** under Page Layout.

7. Save your changes. The profiles are marked editable.

To show an Opportunities or Quotes related list on contracts, use page layouts.

Enable a Contracts Chatter Feed

Add contract fields to be monitored via Chatter.

1. From Setup, enter *Feed Tracking* in the Quick Find box, then select **Feed Tracking**.

2. From the list of objects, select Contract.

3. Select the **Enable Feed Tracking** checkbox and then the checkboxes for the fields that you want to track.

4. Save your changes.

SEE ALSO:

Customize Order Settings

Customize Options for Orders

Customize Order Settings

Customize Salesforce to handle your internal order management process.

Specify the following order settings from the Order Settings page in Setup.

IN THIS SECTION:

Enable Orders

To let your sales team track and manage customer requests for products or services, enable orders.

Enable Reduction Orders

To let your sales team process returns or reductions on activated orders (Salesforce Classic only), enable reduction orders in Salesforce.

Enable Negative Quantities for Order Products

To let your sales team add order products with quantities of less than zero, enable negative quantities.

Enable Orders

To let your sales team track and manage customer requests for products or services, enable orders.

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

2. Make sure that **Enable Orders** is selected.

3. Save your changes.

4. Select which page layouts have an Orders related list, and then save your changes.

5. Use profiles or permission sets to assign user and object permissions to the appropriate users.

If you disable orders, your order-related data is hidden. To access that data, re-enable orders.

SEE ALSO:

Customize Order Settings

Enable Reduction Orders

Enable Reduction Orders

To let your sales team process returns or reductions on activated orders (Salesforce Classic only), enable reduction orders in Salesforce.

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

2. Make sure that **Enable Orders** is selected.

3. Select **Enable Reduction Orders**.

4. Save your changes.

5. Using a profile or permission set, assign the necessary permissions to the appropriate sales team members.

   - To create reduction orders, team members need the "Create Reduction Orders" user permission.

   - To add order products to reduction orders, team members need field-level access to these order product fields: `Start Date`, `End Date`, and `Original Order Product`.

6. Consider adding the Reduction Order Products related list to your page layouts for order products.

> **Note:** If Enable Reduction Orders is later disabled, the "Create Reduction Orders" permission is hidden from all profiles or permission sets, but no data is hidden. Your sales team can't create or activate reduction orders, but they can view and edit existing ones. If you disable reduction orders, disable the record types and page layouts specific to reduction orders. If you aren't using record types, remove fields specific to reduction orders from your page layouts. These include `Original Order` and `Reduction Order` on the Order object, `Original Order Product` and `Available Quantity` on the Order Product object, and any custom fields.

SEE ALSO:

Customize Order Settings

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To modify order settings:
- "Customize Application"

Enable Negative Quantities for Order Products

To let your sales team add order products with quantities of less than zero, enable negative quantities.

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

2. Make sure that **Enable Orders** is selected.

3. Select **Enable Negative Quantity**.

4. Save your changes.

If Enable Negative Quantity is disabled, your sales team can't add order products with negative quantities or activate orders that have order products with negative quantities. But your sales team can still view and edit order products that have negative quantities.

SEE ALSO:

Customize Order Settings

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To modify order settings:
- "Customize Application"

Configure Forecasts

Configure Collaborative Forecasts

Setting Up Collaborative Forecasts

Set up Salesforce so that your sales team can get the most from Collaborative Forecasts.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

IN THIS SECTION:

Considerations for Migrating from Customizable Forecasting to Collaborative Forecasts

Before you migrate from Customizable Forecasting to Collaborative Forecasts, consider a few key points.

Guidelines for Setting Up Collaborative Forecasts

Review key guidelines for setting up Collaborative Forecasts.

Considerations for Defining Forecasts Settings in Collaborative Forecasts

Before you define forecasts settings, review a few key points.

Define Forecasts Settings in Collaborative Forecasts

Choose the types of forecasts that you want and the details that appear on the forecasts page so that your sales team can see the revenue and quantity projections from the sales pipeline.

Enable Users in Collaborative Forecasts

Set up Salesforce so that your sales team can use Collaborative Forecasts.

Enable Partner Portal Users to Add Collaborative Forecasts Opportunities

If your sales team works with partners, you can include the amounts from partner user opportunities in forecasts and add partner portal users to your team's forecast hierarchy. Your partner portal users can't access the Collaborative Forecasts page or its functionality.

Set Up Your Forecast Hierarchy in Collaborative Forecasts

Your forecast hierarchy lists all forecast users and determines how their forecasts roll up through your company. Keep your forecast hierarchy up to date to ensure that forecast managers see all subordinates' forecast amounts.

Select a Forecast Currency in Collaborative Forecasts

Choose the forecast currency option that's right for your sales team.

Define Your Company's Forecast Date Range

The Collaborative Forecasts rollup table displays forecast amounts for individual months or quarters and a range of months or quarters, depending on your Collaborative Forecasts settings.

Display Fields in the Collaborative Forecasts Opportunity Pane

Select up to 15 standard and custom fields to appear in the opportunity pane for each enabled forecast type.

Guidelines for Displaying Fields in the Collaborative Forecasts Opportunity Pane

Refer to key guidelines when you're displaying fields in the Collaborative Forecasts opportunity pane.

Customize Forecast Categories in Collaborative Forecasts

A forecast category is the category within the sales cycle to which an opportunity is assigned based on its opportunity stage. The standard forecast categories are Pipeline, Best Case, Commit, Omitted, and Closed. You can customize the forecast category names.

View and Update Opportunity-Stage-to-Forecast-Category Mappings

Forecasts rely on how opportunity Stage picklist values map to values in the Forecast Category picklist. For example, if you map the Negotiation/Review stage to the Best Case forecast category, the amounts of your opportunities in Negotiation/Review are included in your Best Case forecast amount. If the stage of an opportunity changes, the probability and forecast category also change.

Considerations for Disabling Collaborative Forecasts

Before you disable Collaborative Forecasts, find out how data is affected.

Considerations for Migrating from Customizable Forecasting to Collaborative Forecasts

USER PERMISSIONS		EDITIONS
To view Forecasts setup:	"View Setup and Configuration"	Collaborative Forecasts is available in: both Salesforce Classic and Lightning Experience
To edit Forecasts settings:	"Customize Application"	
To enable Forecasts users:	"Manage Internal Users" AND "Customize Application"	Collaborative Forecasts is available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
To manage quotas:	"Customize Application" AND "Manage Quotas"	
To upload quota data to Salesforce:	"Manage Quotas" AND "View All Forecasts"	Territory management is available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Before you migrate from Customizable Forecasting to Collaborative Forecasts, consider a few key points.

- To enable Collaborative Forecasts, Customizable Forecasting must be disabled. Contact Salesforce for assistance with disabling Customizable Forecasting.

- When you turn off Customizable Forecasting, the Quotas related list no longer appears on User records. The Edit Personal Quota permission (API name: `PermissionsEditOwnQuota`) also no longer appears in the Profile object.

- If you have the original Territory Management feature enabled, disable Customizable Forecasting and original Territory Management before migrating to Collaborative Forecasts. To disable these features, contact Salesforce. You can enable and use Enterprise Territory Management and Collaborative Forecasts at the same time, but the two features aren't integrated to work together.

- When you migrate, the forecast history, overrides, reports, and sharing data from Customizable Forecasting are purged.

- Consider exporting forecasting report data so that you have a backup.

- Monthly forecasts is the default Collaborative Forecasts period. You can change your settings to quarterly. If you use custom fiscal years, your fiscal period is the default. You can also choose your custom quarters.

- The forecast hierarchy is retained. However, to reduce the risk of data loss, consider migrating to Collaborative Forecasts immediately after disabling Customizable Forecasts. After migrating, don't enable Forecasts users again. Validate all hierarchies for accuracy.

- Before migrating, make sure to review What's the difference between the Forecasting versions? to determine whether you can benefit from the latest improvements offered in Collaborative Forecasts.

Guidelines for Setting Up Collaborative Forecasts

Review key guidelines for setting up Collaborative Forecasts.

> **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

> **Important:** Don't disable the new user interface theme in Salesforce Classic or enable original Territory Management. You can enable Enterprise Territory Management, but forecast rollups are based on the role hierarchy and not the territory hierarchy.

- If you're using Lightning Experience, Collaborative Forecasts isn't accessible from Setup. Switch to Salesforce Classic to set up and configure Collaborative Forecasts.
- Enable one to four forecast types.
- Select the fields that appear in the opportunity pane for each forecast type.
- If your sales team uses quotas, enable quotas.
- If your sales team adjusts forecasts, enable forecasts adjustments.
- Choose whether to use individual forecast category rollups or enable cumulative forecast rollups.
- Define your forecast range. You can select the time period and default range. Standard and custom fiscal years are supported.
- If your company uses specific terminology, customize your forecast categories.
- If your company uses multiple currencies, set a forecast currency—your company's corporate currency or the forecast owner's personal currency.
- Enable users who need forecasts.
- Set up your forecasts hierarchy to determine how forecasts roll up within your company and who can view and adjust them. The forecast hierarchy is based on the role hierarchy and specifies which users are forecast managers.
- Make sure that your Collaborative Forecasts users can access the forecasts page.
- For best viewing results, keep the Tab Bar Organizer enabled.

SEE ALSO:

Define Forecasts Settings in Collaborative Forecasts

Considerations for Disabling Collaborative Forecasts

Considerations for Migrating from Customizable Forecasting to Collaborative Forecasts

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Territory management available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Considerations for Defining Forecasts Settings in Collaborative Forecasts

Before you define forecasts settings, review a few key points.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

- If you're using Lightning Experience, Collaborative Forecasts isn't accessible from Setup. Switch to Salesforce Classic to set up and configure Collaborative Forecasts.
- Salesforce recommends that you review the documentation before setting up Collaborative Forecasts. If you change certain settings, you can lose data.
- For a more detailed step-by-step explanation of setting up Collaborative Forecasts and why you'd enable certain functionality, see the *Collaborative Forecasts Implementation Guide*.
- If you disable adjustments, adjustment data is purged.
- If you change your forecast period, quota data and adjustment data are purged.
- If you remove a forecast type, quota data and adjustment data are purged for that forecast type.
- If you change the forecast measurement for a forecast type from revenue to quantity or from quantity to revenue, quota data and adjustment data are purged for that forecast type.

Define Forecasts Settings in Collaborative Forecasts

USER PERMISSIONS

To view Forecasts setup:	"View Setup and Configuration"
To edit Forecasts settings:	"Customize Application"
To enable Forecasts users:	"Manage Internal Users" AND "Customize Application"
To manage quotas:	"Customize Application" AND "Manage Quotas"
To upload quota data to Salesforce:	"Manage Quotas" AND "View All Forecasts"

Choose the types of forecasts that you want and the details that appear on the forecasts page so that your sales team can see the revenue and quantity projections from the sales pipeline.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

🛑 **Important:** Don't disable the new user interface theme in Salesforce Classic or enable original Territory Management. You can enable Enterprise Territory Management, but forecast rollups are based on the role hierarchy and not the territory hierarchy.

1. If you're using Lightning Experience, switch to Salesforce Classic.

2. From Setup, enter `Forecasts Settings` in the `Quick Find` box, then select **Forecasts Settings**. If Collaborative Forecasts isn't enabled, select **Enable Forecasts**.

3. If you don't have a forecast type enabled, click **Add a Forecast Type**. To enable another forecast type, click **Add another forecast type**.

4. Select the forecast type that you want to add. Depending on your configurations, you can choose Opportunities, Opportunity Splits, Overlay Splits, Product Families, or a custom opportunity currency field.

5. Select the forecast measurement that you want to use—**Revenue** or **Quantity**. If you want forecasts for both, add separate forecast types for each.

Not every forecast type supports both measurements. For example, Opportunity Splits forecasts work only with revenue.

6. Select the fields that appear in the opportunity pane of a forecasts page.

You can choose a different set of fields for each forecast type.

7. Click **OK**.

8. Enable forecasts adjustments for your company and for specific users.

9. Enable cumulative forecast rollups.

10. Under Configure the Default Forecast Display, select a forecast period. Standard and custom fiscal years are supported.

11. Under Configure the Default Forecast Display, select a beginning period and the number of periods to display. This setting becomes the default for all Collaborative Forecasts users until they change it on the forecasts page.

12. If you need to, customize your Forecast Categories.

13. If your company uses multiple currencies, select the currency in which your users forecast.

14. Enable quotas.

15. Save your changes.

16. Enable users who need to use Collaborative Forecasts.

17. Set up your forecasts hierarchy to determine how forecasts roll up and who can view and adjust them.

18. Return to the Forecasts Settings page to update settings as needed.

SEE ALSO:

Guidelines for Setting Up Collaborative Forecasts

Considerations for Disabling Collaborative Forecasts

Enable Users in Collaborative Forecasts

Set up Salesforce so that your sales team can use Collaborative Forecasts.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

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

2. For each user that you want to enable, click **Edit**.

3. Under General Information, select **Allow Forecasting**.

4. Save your changes.

Enabled users are listed in your forecast hierarchy. When you configure your forecast hierarchy, you can enable more users or disable users that you've enabled.

SEE ALSO:

Enable Partner Portal Users to Add Collaborative Forecasts Opportunities

Guidelines for Setting Up Collaborative Forecasts

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable Forecasts users:
- "Manage Users"

  AND

  "Customize Application"

Enable Partner Portal Users to Add Collaborative Forecasts Opportunities

If your sales team works with partners, you can include the amounts from partner user opportunities in forecasts and add partner portal users to your team's forecast hierarchy. Your partner portal users can't access the Collaborative Forecasts page or its functionality.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

1. Make sure that you've done the following.
   - Enabled partner portals
   - Created a partner portal
   - Created a partner profile and assigned it to your partner portal
   - Enabled an account as a partner, and enabled partner portal login for a contact of that account

2. From Setup, enter *Users* in the `Quick Find` box, then select **Users** and select the partner portal contact that you created.

3. Make sure that the **Active** and **Allow Forecasting** checkboxes are selected.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable Forecasts users:
- "Manage Internal Users"

  AND

  "Customize Application"

To assign partner profiles to partner portals:
- "Customize Application"

4. Enable the partner portal user in the forecast hierarchy, and make sure that the person is assigned to an active forecast manager.

SEE ALSO:

[Guidelines for Setting Up Collaborative Forecasts](#)

Set Up Your Forecast Hierarchy in Collaborative Forecasts

Your forecast hierarchy lists all forecast users and determines how their forecasts roll up through your company. Keep your forecast hierarchy up to date to ensure that forecast managers see all subordinates' forecast amounts.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

When you assign someone as a forecast manager, all forecasts and adjustments from the manager's subordinates in the hierarchy roll up into the manager's forecasts. Assign a forecast manager to the top level of the forecast hierarchy.

To ensure that the forecast visibility rolls up to every level of the hierarchy, make sure that each sales manager with subordinates is designated as a forecast manager in your forecast hierarchy.

1. If you're using Lightning Experience, switch to Salesforce Classic.

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

3. Click **Expand All** to see the available roles.

4. Click **Enable Users** and then **Add** and **Remove** to move users between the Available Users list and the Enabled Users list. If you previously enabled a user from Setup by entering `Users` in the `Quick Find` box, selecting **Users**, and then editing a user page to allow forecasting, the name appears in the Enabled Users list.

5. To select a forecast manager for each manager role in the hierarchy, click **Edit Manager** next to the role, and then select a name from the Forecast Manager dropdown list.

6. Save your changes.

SEE ALSO:

[Enable Forecast Adjustments in Collaborative Forecasts](#)
[Enable Users in Collaborative Forecasts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable Forecasts users:
- "Manage Users"
  AND
  "Customize Application"

Select a Forecast Currency in Collaborative Forecasts

Choose the forecast currency option that's right for your sales team.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

1. If you're using Lightning Experience, switch to Salesforce Classic.

2. Review the information in Multiple Currencies in Forecasts.

3. From Setup, enter `Forecasts Settings` in the `Quick Find` box, then select **Forecasts Settings**.

4. Under Forecast Currency, choose a forecast currency option.

5. Save your changes.

Define Your Company's Forecast Date Range

The Collaborative Forecasts rollup table displays forecast amounts for individual months or quarters and a range of months or quarters, depending on your Collaborative Forecasts settings.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

⚠️ **Warning:** If you change the time period from monthly to quarterly or quarterly to monthly, or you change the standard fiscal year, all adjustments and quotas are purged. If you enable custom fiscal years, creating the first custom fiscal year deletes any quotas and adjustments in the corresponding and subsequent standard fiscal years. These changes trigger a forecast recalculation that can take significant time, depending on the quantity of your data.

If you use custom fiscal years, your custom periods or quarters are displayed. Users can forecast up to 12 months or eight quarters in the future or past. If your forecast range includes the current month or quarter, the forecasts page displays the current month or quarter by default. If not, the first month or quarter of the range is selected.

The forecast date range becomes the default for all Collaborative Forecasts users. Users can use this default, or they can set a different date range display for their own forecasts. After users change their individual forecast date range displays, Salesforce admins can't override them. However, when changing the *period* display from monthly to quarterly or quarterly to monthly, the change is reflected in all users' forecasts.

1. If you're using Lightning Experience, switch to Salesforce Classic.

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

3. Under Configure the Default Forecast Display, select a beginning period and the number of periods to display.

4. Save your changes.

SEE ALSO:

Guidelines for Setting Up Collaborative Forecasts

Display Fields in the Collaborative Forecasts Opportunity Pane

Select up to 15 standard and custom fields to appear in the opportunity pane for each enabled forecast type.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

1. If you're using Lightning Experience, switch to Salesforce Classic.
2. From Setup, enter `Forecasts Settings` in the `Quick Find` box, then select **Forecasts Settings**.
3. Click the name of the forecast type whose opportunity fields you want to edit.
4. Select the Opportunity fields to display in the list. Arrange the fields from top to bottom to order them left to right in the list.
5. Click **OK**, and then save your changes.

SEE ALSO:

Guidelines for Displaying Fields in the Collaborative Forecasts Opportunity Pane

Guidelines for Setting Up Collaborative Forecasts

Guidelines for Displaying Fields in the Collaborative Forecasts Opportunity Pane

Refer to key guidelines when you're displaying fields in the Collaborative Forecasts opportunity pane.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

- If you add an opportunity field to the opportunity pane, and the field isn't visible to Collaborative Forecasts users, check the field-level security setting for the specific user profile and field. If the forecast is based on that field, the Forecasted Amount column shows the value of the field or the value of the field's split that contributes to the forecast, regardless of field-level security.
- When a rep selects a forecast amount in the rollup table, the list of opportunities that roll up to that amount appears below the table. Select up to 15 standard and custom fields that appear in the opportunity pane for each enabled forecast type. Your sales team sees the selected fields based on their field-level security settings. `Opportunity Name` is a required field. We recommend adding `Forecast Category` to the pane.
- When selecting fields, consider the fields that are used in the forecast rollup.
  - Opportunity-quantity forecasts roll up based on the opportunity's `Quantity` field, while opportunity-revenue forecasts roll up based on the opportunity's `Amount` field.
  - For opportunity splits-revenue forecasts, the rollup is based on the opportunity's `Amount` field and the split percentage that's assigned to the sales rep.

- For custom opportunity field forecasts, the rollup is based on the custom field amount.
- For product family-revenue forecasts, the rollup is based on the sum of the `Total Price` field for all opportunity line items in that product family.
- Product family-quantity forecasts roll up based on the `Quantity` field for all opportunity line items in that product family.
- For opportunities without opportunity line items or with line items that don't have a specified product family, the totals roll up into the Products Not Categorized row on the forecasts page.

Depending on whether your forecast type uses the revenue or quantity measurement, consider adding `Amount` or `Quantity` to the pane.

- If your forecast data source is opportunities or product families, the `Amount` field appears by default. If your data source is opportunity splits, the `Forecasted Amount` and `Split %` fields appear by default. You can change the selected fields for each forecast type even after it has been enabled.

Customize Forecast Categories in Collaborative Forecasts

A forecast category is the category within the sales cycle to which an opportunity is assigned based on its opportunity stage. The standard forecast categories are Pipeline, Best Case, Commit, Omitted, and Closed. You can customize the forecast category names.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

1. From the management settings for opportunities, go to Fields.

2. Click **Forecast Category**.

3. Click **Edit** for any value that you want to edit in the Forecasts Category Picklist Values.

4. Enter a forecast category name.

5. Save your changes.

New forecast category names appear on opportunity records and forecasts.

SEE ALSO:

Guidelines for Setting Up Collaborative Forecasts

View and Update Opportunity-Stage-to-Forecast-Category Mappings

Forecasts rely on how opportunity Stage picklist values map to values in the Forecast Category picklist. For example, if you map the Negotiation/Review stage to the Best Case forecast category, the amounts of your opportunities in Negotiation/Review are included in your Best Case forecast amount. If the stage of an opportunity changes, the probability and forecast category also change.

Here's an example mapping.

Stage	Probability	Forecast Category
Prospecting	10%	Pipeline
Qualification	10%	Pipeline
Needs Analysis	20%	Pipeline
Value Proposition	50%	Pipeline

Stage	Probability	Forecast Category
Id Decision Makers	60%	Pipeline
Perception Analysis	70%	Pipeline
Proposal/Price Quote	75%	Pipeline
Negotiation/Review	90%	Best Case
Closed Won	100%	Commit

1. From the management settings for opportunities, go to Fields.

2. Click **Stage**. Each row in Opportunity Stages Picklist Values shows a stage and the forecast category that it's mapped to.

3. Click **Edit** to change a mapping.

4. Save your changes.

Considerations for Disabling Collaborative Forecasts

Before you disable Collaborative Forecasts, find out how data is affected.

📝 Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

⚠️ Warning: Disabling certain functionality can result in purged quota and adjustment data, so consider exporting your data before disabling anything. When you complete your setting changes, you can import the data back into Salesforce. If you change your time period from monthly to quarterly or from quarterly to monthly, you *can't* import your quota or adjustments data back into Salesforce, because the existing values don't align with your new periods.

If you disable...	These items are purged...
Collaborative Forecasts	Adjustments (your forecast hierarchy stays in place)
A forecast type	Quotas and adjustments for that forecast type
Adjustments	Adjustments
The monthly period setting to use quarterly periods OR The quarterly period setting to use monthly periods	Quotas and adjustments

To disable Collaborative Forecasts, contact Salesforce.

When adjustments are purged from forecasts, the underlying data on which the forecasts are based isn't affected.

SEE ALSO:

Define Forecasts Settings in Collaborative Forecasts

Quotas in Collaborative Forecasts

Enable quotas in Collaborative Forecasts so that users can upload and display quotas alongside forecast amounts.

A quota is the monthly or quarterly sales goal that's assigned to a user. A manager's quota equals the amount that the manager and team are expected to generate together. The quota rollup is done manually by users and managers, and revenue or quantity data can be used. If multiple types of forecasts are enabled, each forecast type maintains separate quota information.

Viewing quota attainment information isn't available in Lightning Experience.

IN THIS SECTION:

Enable Quotas in Collaborative Forecasts

If you have API access, you can upload quotas for Collaborative Forecasts users and display them alongside your sales team's forecast amounts.

Load Quota Data in Collaborative Forecasts

Load quota data for forecasts with Data Loader or Salesforce APIs.

Enable Quotas in Collaborative Forecasts

To view Forecasts setup:	"View Setup and Configuration"
To edit Forecasts settings:	"Customize Application"
To enable Forecasts users:	"Manage Internal Users" AND "Customize Application"
To manage quotas:	"Customize Application" AND "Manage Quotas"
To upload quota data to Salesforce:	"Manage Quotas" AND "View All Forecasts"

If you have API access, you can upload quotas for Collaborative Forecasts users and display them alongside your sales team's forecast amounts.

> 📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

1. If you're using Lightning Experience, switch to Salesforce Classic.

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

3. Under Quotas, select **Show Quotas**.

4. Save your changes.

Viewing quota attainment information isn't available in Lightning Experience.

If you disable Collaborative Forecasts, quotas are disabled.

When you change your data source or disable revenue or quantity forecasts, related quotas are purged.

SEE ALSO:

Load Quota Data in Collaborative Forecasts

Guidelines for Setting Up Collaborative Forecasts

Load Quota Data in Collaborative Forecasts

USER PERMISSIONS		EDITIONS
To view Forecasts setup:	"View Setup and Configuration"	Available in: both Salesforce Classic and Lightning Experience
To edit Forecasts settings:	"Customize Application"	
To enable Forecasts users:	"Manage Internal Users" AND "Customize Application"	Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
To manage quotas:	"Customize Application" AND "Manage Quotas"	Available in: **Professional** Edition with the "API Enabled" permission
To upload quota data to Salesforce:	"Manage Quotas" AND "View All Forecasts"	

Load quota data for forecasts with Data Loader or Salesforce APIs.

> 📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Data Loader provides a simple point-and-click method for adding, inspecting, and editing data in Salesforce. APIs provide more flexibility but require you to write code. To use either method, make sure that API access is enabled. See Data Loader for details.

Add Quotas with Data Loader

Before you upload quotas, consider the version of Data Loader that you're using. For Data Loader v.30 and later, specify the forecast type of each quota that you plan to upload.

1. Query the User object for your users' IDs.

Use Data Loader to retrieve your users' IDs.

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

   b. Download and install Data Loader.

   c. Launch Data Loader.

   d. Click **Export**.

   e. Enter your user name and password, and then click **Log in**.

   f. Click **Next**.

   g. Select the User object from the list.

   h. Choose a file name and destination for the exported data.

   i. Click **Next**.

   j. Select the **Id** and **Name** fields.

   k. Click **Finish** and then **Yes**.

   l. Click **View Extraction**.

   m. Click **Open in external program**.

   n. Save the file in the .csv format. Add user names and IDs to your quotas spreadsheet before uploading it.

2. If you're using Data Loader v.30 or later, query the ForecastingType object to get the IDs of your forecast types. If you're not using Data Loader v.30 or later, skip to step 3.

   a. Launch Data Loader.

   b. Click **Export**.

   c. Enter your user name and password, and then click **Log in**.

   d. Click **Next**.

   e. Click **Show all Salesforce objects**.

   f. Select the Forecasting Type object from the list.

   g. Choose a file name and destination for the exported data.

   h. Click **Next**.

   i. Select the **Id** and **DeveloperName** fields.

   j. Click **Finish** and then **Yes**.

   k. Click **View Extraction**.

   l. Click **Open in external program**.

   m. Save the file in the .csv format.

   n. Note the `DeveloperName` and `Id` values for each active forecast type. Not all companies use all forecast types that appear in the results. Review this list if you're not sure which forecast type a specific `DeveloperName` refers to.

     • `OpportunityRevenue` : Opportunities - Revenue

     • `OpportunityQuantity` : Opportunities - Quantity

     • `OpportunitySplitRevenue` : Opportunity Revenue Splits - Revenue

     • `OpportunityOverlayRevenue` : Opportunity Overlay Splits - Revenue

     • `OpportunityLineItemRevenue` : Product Families - Revenue

- `OpportunityLineItemQuantity` : Product Families - Quantity
- The name of a custom opportunity split type that has been enabled as a forecast type. Custom split types are based on currency fields, which can contain revenue amounts only.

o. Add columns for `DeveloperName` and `Id` to your quota spreadsheet, and then add the name and ID of the forecast type of your quotas to each row. The name is not necessary for uploading quotas, but it helps to know which forecast type you're working with in each row.

3. Prepare your quota spreadsheet for upload.

- If you're using Data Loader v.30 or later, create a .csv file with columns for User Name, User ID, Forecast Type Name, Forecast Type ID, Quota Amount, Quota Quantity, Currency Code, and forecast period Start Date [*yyyy-mm-dd* or *yyyy-mm-ddThh:mm:ss.sssZ*; for example, 2012–03–01T08:00:00.00Z].
- If you're using Data Loader v.29 or earlier, create a .csv file with columns for User Name, User ID, Quota Amount, Quota Quantity, Currency Code, and forecast period Start Date [*yyyy-mm-dd* or *yyyy-mm-ddThh:mm:ss.sssZ*; for example, 2012–03–01T08:00:00.00Z]. If you use revenue *and* quantity forecasts, specify the quotas for them on separate rows of your .csv file.

You don't need the User Name or Forecast Type Name columns, but including them makes it easy to understand the contents of your .csv file.

User Name	User ID	Forecast Type Name (for Data Loader v.30 or later)	Forecast Type ID (for Data Loader v.30 or later)	Quota Amount	Quota Quantity	Currency Code	Start Date
Kevin Bailey	00599000000Hofh	OpportunityRevenue	0DbD00000001eQBKAY	250000		USD	2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityRevenue	0DbD00000001eQBKAY	250000		USD	2012–04–01
Kevin Bailey	00599000000Hofh	OpportunityRevenue	0DbD00000001eQBKAY	250000		USD	2012–05–01
Kevin Bailey	00599000000Hofh	OpportunityQuantity	0DbD00000001eQAKAY		500		2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityQuantity	0DbD00000001eQAKAY		500		2012–04–01
Kevin Bailey	00599000000Hofh	OpportunityQuantity	0DbD00000001eQAKAY		500		2012–05–01

If your forecast data source is product families, include a Product Family column. (Product family forecasts view isn't available in Lightning Experience.)

User Name	User ID	Forecast Type Name (for Data Loader v.30 or later)	Forecast Type ID (for Data Loader v.30 or later)	Product Family	Quota Amount	Quota Quantity	Currency Code	Start Date
Kevin Bailey	00599000000Hofh	OpportunityLineItemRevenue	0DbD00000001eQ9KAI	Hardware	250000		USD	2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityLineItemRevenue	0DbD00000001eQ9KAI	Software	150000		USD	2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityLineItemRevenue	0DbD00000001eQ9KAI	Services	50000		USD	2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityLineItemQuantity	0DbD00000001eQ8KAI	Hardware		500		2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityLineItemQuantity	0DbD00000001eQ8KAI	Software		300		2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityLineItemQuantity	0DbD00000001eQ8KAI	Services		100		2012–03–01

4. Use Data Loader to upload your quota information to Salesforce.

   a. Launch Data Loader.

   b. Click **Insert**.

   c. Log in with your user name and password.

   d. Click **Next**.

   e. Click **Show All Salesforce Objects**.

   f. Select the Forecasting Quota object from the list.

   g. Click **Browse**, and then choose the .csv file to upload.

   h. Click **Next**.

   i. Click **OK** in the Data Selection dialog box.

   j. Click **Create or Edit a Map**.

   k. Map columns to fields in the ForecastingQuota object as shown in this table.

Column Headers in CSV File	ForecastingQuota Fields
User ID	QuotaOwnerID
Quota Amount	QuotaAmount
Quota Quantity	QuotaQuantity
Currency Code	CurrencyIsoCode
Start Date	StartDate
Product Family (needed only when the forecast data source is Product Families)	ProductFamily
Forecast Type ID (needed only for Data Loader v.30 or later)	ForecastingTypeID

   l. Click **OK**.

   m. Click **Next**.

   n. Click **Browse**, and then choose the directory where you want to save the log file containing messages about the success or failure of the upload.

   o. Click **Finish**.

   p. Click **Yes** to proceed with the upload.

   q. Click **OK**.

As a best practice, load quota data in the quota owner's personal currency. You can still upload quota data using the API even if `Show Quotas` is disabled. If your Data Loader time zone setting is ahead of quota owners' time zones, the month can be off by one. To avoid this problem, use a date greater than or equal to the third day of each month when inserting quotas.

Uploading Quotas with the API

When uploading quota information with the API, be sure to use the correct API version, depending on the type of quota data that you're working with. If multiple types of forecasts are enabled, each forecast type maintains separate quota information.

When importing...	Use API version...
Revenue quotas for opportunity-based forecasts	25.0 or later
Quantity quotas for opportunity-based forecasts	28.0 or later
Revenue quotas for opportunity splits-based forecasts	29.0 or later
Revenue or quantity quotas for product family-based forecasts	29.0 or later
Quotas in orgs with multiple forecast types enabled	30.0 or later

Forecast Adjustments

Enable forecast adjustments in Collaborative Forecasts so that your sales team can adjust forecasts as needed.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

IN THIS SECTION:

Enable Forecast Adjustments in Collaborative Forecasts

Enable managers to adjust subordinates' forecasts, all forecast users to adjust their own forecasts, or both.

Disable Forecast Adjustments in Collaborative Forecasts

If you no longer want forecast managers to adjust subordinates' forecast amounts or forecast owners to adjust their own forecasts, turn off forecast adjustments. Updating user permissions isn't required.

Enable Forecast Adjustments in Collaborative Forecasts

Enable managers to adjust subordinates' forecasts, all forecast users to adjust their own forecasts, or both.

> **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

1. Set up your forecast hierarchy.

2. If you're using Lightning Experience, switch to Salesforce Classic.

3. From Setup, enter `Forecasts Settings` in the `Quick Find` box, then select **Forecasts Settings**.

4. To let forecast managers adjust their subordinates' forecast amounts, under Enable Forecast Adjustments, select **Enable Manager Adjustments**.

5. To let all forecast users adjust their own forecast amounts, under Enable Forecast Adjustments, select **Enable Owner Adjustments**.

   > **Note:** If you use product family forecasts, you can't adjust your own product family forecast amounts.

6. Save your changes.

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

8. Find a profile for which you want adjustments enabled.

9. If you're using the enhanced profile user interface, click **App Permissions** and then **Edit**.

10. Select **Override Forecasts**, and then save your changes.

If multiple types of forecasts are enabled, each forecast type maintains separate adjustments.

SEE ALSO:

   Guidelines for Setting Up Collaborative Forecasts

   Define Your Company's Forecast Date Range

Disable Forecast Adjustments in Collaborative Forecasts

If you no longer want forecast managers to adjust subordinates' forecast amounts or forecast owners to adjust their own forecasts, turn off forecast adjustments. Updating user permissions isn't required.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

⚠️ **Warning:** Disabling forecast adjustments purges existing adjustments for all forecast types. Before disabling adjustments, see Adjustments Purges in Collaborative Forecasts. Disabling certain functionality can result in purged quota and adjustment data, so consider exporting your data before disabling anything. When you complete your setting changes, you can import the data back into Salesforce.

1. If you're using Lightning Experience, switch to Salesforce Classic.

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

3. To prevent forecast managers from adjusting subordinates' forecast amounts, under Enable Forecast Adjustments, deselect **Enable Manager Adjustments**.

4. To prevent all forecast users from adjusting their own forecast amounts, under Enable Forecast Adjustments, deselect **Enable Owner Adjustments**.

5. Save your changes.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable Forecasts users:
- "Manage Users"

  AND

  "Customize Application"

Cumulative Forecast Rollups

Specify how your sales team rolls up opportunities into Collaborative Forecasts.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

IN THIS SECTION:

Cumulative Forecast Rollups in Collaborative Forecasts
Learn about methods for rolling up opportunities into forecasts for your sales teams.

Enable Cumulative Forecast Rollups in Collaborative Forecasts
Choose between Cumulative Forecast Rollup columns or individual forecast category columns.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Cumulative Forecast Rollups in Collaborative Forecasts

Learn about methods for rolling up opportunities into forecasts for your sales teams.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

- Individual forecast category rollups combine the opportunities from each individual forecast category into separate forecast amounts for each category.
- Cumulative forecast rollups combine opportunities from multiple forecast categories into cumulative forecast amounts.

The default rollup setting is individual forecast category rollups. If you choose **Cumulative Forecast Rollups**, the way opportunities roll up to forecast amounts is different. The column names on the forecasts page are also different.

Category Rollup Method	Column Name on the Forecasts Page	Opportunities That Roll Up to It
Individual	Pipeline	Pipeline
	Best Case	Best Case
	Commit	Commit
	Closed	Closed
Cumulative	Open Pipeline	• Pipeline • Best Case • Commit
	Best Case Forecast	• Best Case • Commit • Closed
	Commit Forecast	• Commit • Closed
	Closed Only	Closed

Advantages of Cumulative Forecast Rollups

With individual forecast category rollups, each total and subtotal represents opportunities from only one of the individual forecast categories. This type of rollup means that if forecast users want to know the total that they're going to bring for the month or quarter, they need to add the Best Case, Commit, and Closed forecast amounts together.

Example: Individual Forecast Rollup				
Forecast amounts	Closed	Commit	Best Case	Pipeline
	$50	$100	$150	$200
Opportunities	Closed	Commit	Best Case	Pipeline

Example: Individual Forecast Rollup			
$50	• $50 • $50	• $50 • $50 • $50	• $50 • $50 • $50 • $50

With Cumulative Forecast Rollups, the forecast columns show cumulative amounts from the opportunities in the named forecast category and subsequent categories in your sales funnel. This view makes it easier for sales team members to see the total numbers that they're likely to bring in without combining the category totals themselves.

For example, this table shows the cumulative forecast rollup amounts when there are four Pipeline, three Best Case, two Commit, and one Closed opportunity, each worth $50.

Example: Cumulative forecast rollup			
Forecast amounts	Closed Only	Commit Forecast	Best Case Forecast	Open Pipeline
	$50	$150	$300	$450
Opportunities	Closed	Commit	Best Case	Pipeline
	$50	• $50 • $50	• $50 • $50 • $50	• $50 • $50 • $50 • $50

📝 **Note:** You can't use Forecast Historical Trending with Cumulative Forecast Rollups.

Enable Cumulative Forecast Rollups in Collaborative Forecasts

Choose between Cumulative Forecast Rollup columns or individual forecast category columns.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Changing the forecast column display purges all adjustments to Commit and Best Case forecast amounts, but not quota data.

1. If you're using Lightning Experience, switch to Salesforce Classic.
2. From Setup, enter `Forecasts Settings` in the `Quick Find` box, then select **Forecasts Settings**.
3. Select **Enable Cumulative Forecast Rollups**, and then save your changes.

Forecast Types

Use forecast types to give your sales team maximum flexibility with Collaborative Forecasts.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

IN THIS SECTION:

Forecast Types in Collaborative Forecasts

A forecast type is a forecast that's configured to use a specific type of data. You can use the opportunity `Amount` field, opportunity splits, overlay splits, custom opportunity fields, or product families. Each forecast type specifies a measurement: revenue or quantity.

Enable Forecast Types for Collaborative Forecasts

Let your sales team choose from four types of forecasts to predict sales from multiple perspectives.

Enable Revenue Splits Forecasts or Overlay Splits Forecasts in Collaborative Forecasts for Sales Managers

Add revenue splits forecasts so that your sales team can track revenue from opportunities with multiple sales reps. Add overlay forecasts so that your sales team can track revenue from overlay sales roles.

For each custom opportunity field that your sales team wants to forecast on, enable a custom split type, even if the field doesn't include splits. When a sales rep creates an opportunity, the rep receives a 100% split for any 100% validated custom split type that you enable. So even if you don't intend to split the custom field, the forecast rollup includes 100% of the amount in the custom field.

Forecast Types in Collaborative Forecasts

A forecast type is a forecast that's configured to use a specific type of data. You can use the opportunity `Amount` field, opportunity splits, overlay splits, custom opportunity fields, or product families. Each forecast type specifies a measurement: revenue or quantity.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Forecast Type	What the Rollup Is Based On
Opportunities - Revenue	The opportunity `Amount` field.
Opportunities - Quantity	The opportunity `Quantity` field.
Product Families - Revenue	The opportunity `Amount` field. Forecast amounts are separated by product family. To use a Product Family forecast, use Opportunity Products and Product Families.
Product Families - Quantity	The opportunity `Quantity` field. Forecast amounts are separated by product family. To use a Product Family forecast, use Opportunity Products and Product Families.
Opportunity Splits - Revenue	The opportunity `Amount` field and each sales team member's split percentage. For Opportunity Splits - Revenue forecasts, the split percentages for each opportunity must total 100%. To use opportunity splits forecasts, enable Opportunity Teams, Opportunity Splits, and the Revenue split type.
Overlay Splits - Revenue	The opportunity `Amount` field and each overlay sales team member's split percentage. For Overlay Splits - Revenue forecasts, the split percentages don't need to total 100%. To use overlay splits forecasts, enable Opportunity Teams, Opportunity Splits, and the Overlay split type.
Custom Opportunity Currency Field - Revenue	The amount in the custom opportunity currency field that you specify. To use custom opportunity currency field forecasts, Opportunity Teams and Opportunity Splits must be enabled. Enable a custom split type for the field, even if you don't intend to split credit for the field amount.

Forecast Type	What the Rollup Is Based On
Expected Revenue - Revenue	The amount in the opportunity `Expected Revenue` field. To forecast on the `Expected Revenue` field, enable Opportunity Teams and Opportunity Splits. Enable a custom split type for the field, even if you don't intend to split credit for the field amount.

Opportunities

- To forecast on the `Amount` field of opportunities, use an opportunity revenue forecast.
- To forecast on the `Quantity` field of opportunities, use an opportunity quantity forecast.

Product Families

If your company groups its products and services into families and needs to forecast based on those families, use a product family forecast. With product families, keep the following in mind.

- Product family forecasts view isn't available in Lightning Experience.
- The Amount column appears in the opportunity list on the forecasts page.
- You can forecast on revenue, quantity, or both.
- Forecast users can view individual product family forecasts for each sales team member below them in the forecast hierarchy.
- Use Opportunity Products and Product Families.
- We recommend completing the `Product Family` field on each product record. Forecasts for products without a Product Family value appear in a forecast row titled Products Not Categorized. (If an opportunity lacks line items, the opportunity amount or quantity also appears in this row.)
- Adjustments can be made to the forecasts for a sales rep's product family forecasts but not directly to the rep's total forecast for all product families.
- You can set separate product family quotas for each sales rep but not a single quota for each sales rep.

Opportunity Splits

If your sales team uses team selling and opportunity splits, use an opportunity splits revenue forecast. With opportunity splits, keep the following in mind.

- You can forecast on revenue but not on quantity.
- You must have Team Selling, Opportunity Splits, and the Revenue split type enabled.

Overlay Splits

Use overlay splits to track revenue from sales team members who help close opportunities but aren't directly responsible for them.

- The overlay splits on a specific opportunity don't have to total 100%.
- You can forecast on revenue but not on quantity.
- You must have Team Selling, Opportunity Splits, and the Overlay split type enabled.

Custom Opportunity Currency Fields

If you use custom currency fields on opportunities, you can forecast on the amounts in those fields.

- Because the field must be a custom currency field, you can forecast on revenue but not quantity.

- You can forecast on the custom field regardless of whether it includes opportunity splits.
- Regardless of whether the field uses splits, you must have Team Selling, Opportunity Splits, and a custom split type enabled for the field.

Expected Revenue

If the value of the `Amount` field and the actual revenue brought in by the opportunity often differ, the `Expected Revenue` field on opportunities is useful. If your sales team anticipates this difference, consider using the `Expected Revenue` field and forecasting on it.

- You can forecast on revenue but not quantity.
- You can forecast on the `Expected Revenue` field regardless of whether you use opportunity splits with it.
- Regardless of whether you use splits with the `Expected Revenue` field, you must enable Team Selling, Opportunity Splits, and a custom split type for it.

When you enable multiple types of forecasts, Custom Forecast Views lets you customize the opportunity information that's displayed for each forecast.

For example, if your sales team forecasts revenue from opportunities and product families, enable opportunity and product family forecasts based on revenue.

Here you can see the Opportunities Revenue forecasts page, which shows revenue totals for each sales rep in each forecast rollup.

Each user can change the forecast view from one forecast type to another by using the forecast type menu.

And when reps change the forecast type to Product Family Revenue, they can see each sales rep's totals by product family.

Enable Forecast Types for Collaborative Forecasts

Let your sales team choose from four types of forecasts to predict sales from multiple perspectives.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

With opportunities and product families, you can set up forecast types for quantity and revenue. With opportunity splits, the only choice is revenue.

When you enable a forecast type, the initial calculation of the new forecast can take some time, depending on the number of opportunities, users, and product families in Salesforce.

1. Review the details of each forecast type.

2. If you're using Lightning Experience, switch to Salesforce Classic.

3. From Setup, enter `Forecasts Settings` in the `Quick Find` box, then select **Forecasts Settings**.

4. Do one of the following.

   - If you don't have forecast types enabled, click **Add a Forecast Type**.

   - If you have at least one forecast type enabled, click **Add another forecast type**.

5. From the Forecast Type menu, choose the data source to use for the forecast.

6. Choose the forecast measurement to use: Revenue or Quantity. To use both, add a separate forecast type for each.

7. Choose the columns that you want to display in the related opportunities list on the forecasts page for the forecast type.
   If your forecast data source is opportunities or product families, the `Amount` field appears by default. If your data source is opportunity splits, the `Forecasted Amount` and `Split %` fields appear by default. You can change the selected fields for each forecast type even after it has been enabled. Depending on whether your forecast type uses the revenue or quantity measurement, consider adding `Amount` or `Quantity` to the pane.

8. Click **OK**, and then save your changes.

9. Repeat this procedure for each forecast type that you want to add.

⚠ **Warning:** If you disable a forecast type, all related quota and adjustment information is purged.

SEE ALSO:
Guidelines for Setting Up Collaborative Forecasts
Display Fields in the Collaborative Forecasts Opportunity Pane

Enable Revenue Splits Forecasts or Overlay Splits Forecasts in Collaborative Forecasts for Sales Managers

Add revenue splits forecasts so that your sales team can track revenue from opportunities with multiple sales reps. Add overlay forecasts so that your sales team can track revenue from overlay sales roles.

> 📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

1. Make sure that the following are enabled.

   - Collaborative Forecasts
   - Team Selling and Opportunity Splits
   - The revenue opportunity split type or overlay opportunity split type

2. If you're using Lightning Experience, switch to Salesforce Classic.

3. From Setup, enter `Forecasts Settings` in the `Quick Find` box, then select **Forecasts Settings**.

4. Enable up to four forecast types.

   - If you don't have forecast types enabled, click **Add a Forecast Type**.
   - If you have at least one forecast type enabled, click **Add another forecast type**.

5. From the Forecast Type menu, choose **Opportunity Revenue Splits** or **Opportunity Overlay Splits**. Revenue is the only forecast measurement available for overlay splits.

6. Choose the columns to display in the related opportunities list on the forecasts page for the overlay forecast. To make it easy for forecast users to see the split amounts on each opportunity, include the Split column.

7. Click **OK**, and then save your changes.

Enable Custom Field Forecasts in Collaborative Forecasts for Sales Managers

For each custom opportunity field that your sales team wants to forecast on, enable a custom split type, even if the field doesn't include splits. When a sales rep creates an opportunity, the rep receives a 100% split for any 100% validated custom split type that you enable. So even if you don't intend to split the custom field, the forecast rollup includes 100% of the amount in the custom field.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

1. Make sure that the following are enabled.

   - Collaborative Forecasts
   - At least one custom opportunity currency field
   - Team Selling and Opportunity Splits
   - A custom opportunity split type based on the custom field

2. If you're using Lightning Experience, switch to Salesforce Classic.

3. From Setup, enter `Forecasts Settings` in the `Quick Find` box, then select **Forecasts Settings**.

4. Enable up to four forecast types.

   - If you don't have forecast types enabled, click **Add a Forecast Type**.
   - If you have at least one forecast type enabled, click **Add Another Forecast Type**.

5. From the Forecast Type menu, choose the name of the custom opportunity split type that you created based on your custom opportunity field. Revenue is the only forecast measurement available for custom field forecasts.

6. Choose the columns to display in the related opportunities list on the forecasts page for the custom field forecast. Include the Split column to make it easy for Collaborative Forecasts users to see the split amounts on each opportunity.

7. Click **OK**, and then save your changes.

SEE ALSO:

Enable Opportunity Splits

Configure Customizable Forecasts

Setting Up Customizable Forecasting

📝 **Note:** This information applies to Customizable Forecasting and not Collaborative Forecasts.

Sales forecasts represent the best estimate of how much revenue you can generate. They give your managers and executives a view of your overall business no matter how dispersed your sales teams are.

Because forecasting is so universal, customizable forecasting is a flexible solution for even the most advanced requirements. Get started using customizable forecasting in Setup by entering `Forecasts (Customizable)` in the `Quick Find` box, then selecting **Forecasts (Customizable)**:

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable opportunity split types:
- "Customize Application"

To view Forecast Setup:
- "View Setup and Configuration"

To edit Forecast Settings:
- "Customize Application"

EDITIONS

Available in: Salesforce Classic

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

- Click **Edit Forecast settings for your company** to customize the default settings for your organization. See Define Customizable Forecast Settings.
- Click **Batch submit forecasts for your users** to set up batch submission. See Submit Customizable Forecasts in Batches.
- Click **Set up the forecasting hierarchy for your company** to set up your initial forecast hierarchy. Refer to Set Up Your Forecast Hierarchy.

Define Customizable Forecast Settings

Once you enable Customizable Forecasts for your organization, you need specify the settings that are most appropriate to how you run your business.

> **Note:** This information applies to Customizable Forecasting and not Collaborative Forecasts.

Define the following settings for your organization:

- **Forecast Data Aggregation** determines the type of data that is displayed on forecasts.
- **Forecast Summary Default View** determines the default product family, date start, date range, and forecast numbers for default forecasts.
- **Forecast Data Sharing** determines whether forecast data can be shared.

To set forecast options:

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

2. Select `Forecast Revenue` if you want forecasts to include revenue amount. If you disable this setting, you lose all revenue overrides on your forecasts.

3. Select `Forecast Quantity` if you want forecasts to include quantity totals. If you disable this setting, you lose all quantity overrides on your forecasts.

4. Choose a `Forecast Period`. If you do not have custom fiscal years enabled, choose monthly or quarterly depending on your organization's forecasting cycle. The month or quarter start date is based on Greenwich Mean Time (GMT). If you have enabled custom fiscal years, you can choose to forecast by fiscal period or by fiscal quarter. The forecast period you choose determines the time increment your organization uses for quotas and forecasts. If you choose monthly, you can still see totals by quarters but, if you choose quarterly, monthly forecast totals are not available. If you change this setting, you lose all overrides and forecasts, including all forecast history.

5. Choose a `Forecast Date` that determines how opportunity amounts contribute to forecasts:

   - If you want the entire opportunity amount to contribute to the forecast period for that date, choose `Opportunity Close Date`. If your organization does not use products, this option is the only one available.

   - If you want the amount of the product on the opportunity to contribute to the forecast period that corresponds with the `Product Date`, choose `Product Date`. When no products exist on an opportunity or the product date is blank, Salesforce uses the `Opportunity Close Date` in the user's forecast instead.

   - If you want the individual revenue schedule amounts to contribute to the forecast periods that correspond with the schedule dates, choose `Schedule Date`. If a product does not have a revenue schedule, Salesforce uses the `Product Date` in the user's forecast instead.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To define forecast settings:
- "Customize Application"

6. Choose a `Forecast Type`:

- Choose `Use Overall Forecast` if your organization does not use products. Your users have one forecast and one quota for each period. If your organization does not use products, this option is the only one available.
- Choose `Use Product Families` if your users have one quota and one forecast for each product family. See Using Product Families.

7. Choose a default view for your users. This setting determines what forecast product family, date start, date range, and forecast totals to display for users when they first click the Forecasts tab. Users can change their view but the default remains the same for all users.

8. Enable or disable forecast sharing by selecting or deselecting `Enable Forecast Sharing`.

9. Click **Save**.

If you have enabled forecast sharing, you are prompted to choose who can share existing forecast views. The options are:

- `Require Administrator assistance for forecast sharing` - Only administrators can share existing forecast data.
- `Forecast managers can share their own forecast data` - Administrators can share existing forecast data, and existing forecast managers can also share their own views.

> **Note:** This choice applies to existing forecasting views only; it is not a default setting for your organization. Each time you edit or assign a forecast manager in the role hierarchy, define who can share that view.

If you have chosen to disable forecast sharing, you are prompted to confirm your choice.

Customizable Forecasting includes five standard report types. You can't create custom report types with Customizable Forecasting.

SEE ALSO:

Set Your Fiscal Year for Customizable Forecasting

Your fiscal year determines your monthly or quarterly forecasting cycle, the month it starts, and whether the `Fiscal Year` is named for the starting or ending year. For example, if your fiscal year starts in April 2015 and ends in March 2016, your fiscal year setting can be either 2015 or 2016.

> **Note:** This information applies to Customizable Forecasting and not Collaborative Forecasts.

To set your fiscal year for customizable forecasting:

1. Archive your data. We recommend running your weekly or monthly data export before setting the fiscal year, because changing the setting affects your opportunity and forecast data.

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

3. Choose a `Forecast Period` of monthly or quarterly depending on your forecasting cycle. The month or quarter start date is based on Greenwich Mean Time (GMT).

The forecast period you choose determines the time increment your company uses for quotas and forecasts. If you choose monthly, you can still see totals by quarters but, if you choose quarterly, monthly forecast totals are not available.

4. Choose a `Fiscal Year Start Month` that represents the beginning of your fiscal year.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set fiscal year:
- "Customize Application"

5. Select a `Fiscal year is based on` option that represents how your company refers to a fiscal year. For example, if your fiscal year starts in April 2015 and ends in March 2016 and is called *Fiscal Year 2016*, choose `The ending month`. The last month determines how your company refers to that fiscal year.

6. If you want to change the fiscal year settings of forecasts created before you enabled customizable forecasts, select `Apply to all forecasts and quotas`. This option changes your historical forecast data.

7. Click **Save**.

SEE ALSO:

    Setting Up Customizable Forecasting

Set Up Your Forecast Hierarchy

Your forecast hierarchy lists all forecast users and determines how their forecasts roll up through your Salesforce org. Keep your forecast hierarchy up-to-date to ensure that forecast managers see all subordinates' forecast amounts.

📝 **Note:** This information applies to Customizable Forecasting and not Collaborative Forecasts.

Your forecast is based on the role hierarchy by default, or the territory hierarchy if your org has territory management.

When customizable forecasting is enabled for your org, it automatically generates a forecast hierarchy based on your org's role hierarchy. The forecast hierarchy becomes based on your territory hierarchy only when you enable territory management. To customize your forecast hierarchy:

- Make sure that all the appropriate users are in your forecast hierarchy. If any are not and should be, see Enable Users for Customizable Forecasting.

- Make sure that the appropriate users are the assigned forecast manager whenever there is more than one user in a role or territory in your forecast hierarchy. Each user at the bottom of your forecast hierarchy can be a forecast manager. However, above that, a single user must be chosen as the forecast manager for forecasts to roll up to that user. See Assigning Forecast Managers in Your Forecast Hierarchy.

- Share forecast manager views with other users. See Manually Sharing a Forecast.

Be sure each sales manager with subordinates is designated as a forecast manager in your forecast hierarchy. This ensures that the forecast visibility rolls up to every level of the hierarchy.

If `Nonforecasting` appears next to a role or territory in the forecast hierarchy, it means that a forecast manager has not been assigned to that role or territory.

📝 **Note:** When you remove a user from the forecast hierarchy or the role hierarchy, all their quota and override data is permanently deleted.

SEE ALSO:

    Setting Up Customizable Forecasting

    Set Up Your Forecast Hierarchy

    Manually Sharing a Forecast

EDITIONS

Available in: Salesforce Classic

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

Territory management available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To set up forecast hierarchy:
- "Customize Application"

Enable Users for Customizable Forecasting

To give users access to sales forecasts, add them to the forecast hierarchy and give them the Allow Forecasting permission.

> **Note:** This information applies to Customizable Forecasting and not Collaborative Forecasts.

To enable users for customizable forecasting if your organization does not use territory management:

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

2. To view a list of users assigned to a level, click **Enable Users** next to a role at that level.

3. To enable the user for customizable forecasting, select a user and click **Add**. To disable a user, select the user and click **Remove**.

4. Click **Save**.

> **Note:** When you remove a user from the forecast hierarchy or the role hierarchy, all their quota and override data is permanently deleted.

To enable a user for customizable forecasting if your organization uses territory management:

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

2. Click **Edit** next to the user's name.

3. Select **Allow Forecasting**.

4. Click **Save**.

5. Add the user to a territory.

Customizable Forecasting includes five standard report types. You can't create custom report types with Customizable Forecasting.

> **Note:** To view a list of users for a territory, select the territory name in the territory hierarchy or run a territory report. For more information on territory reports, see Territory Reports.
>
> If you add multiple users to a role or territory, assign only one as the forecast manager for that role or territory. See Assigning Forecast Managers in Your Forecast Hierarchy

SEE ALSO:

Setting Up Customizable Forecasting

Enable Territory Management

Manually Sharing a Forecast

EDITIONS

Available in: Salesforce Classic

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

Territory management available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To set up forecast hierarchy:
- "Customize Application" or "Manage Users"

Assigning Forecast Managers in Your Forecast Hierarchy

📝 **Note:** This information applies to Customizable Forecasting and not Collaborative Forecasts.

After users are enabled for customizable forecasting, assign a user as a forecast manager for each role in your forecast hierarchy. Assigning someone as a forecast manager means that all forecasts from users below that user in the forecast hierarchy roll up to that person. For example, an executive and executive assistant may have the same role, but the executive is the assigned forecast manager in the forecast hierarchy because all subordinates' forecasts roll up to the executive. Both the executive and executive assistant can submit forecasts, but forecasts of other users do not roll up to the executive assistant.

If a role in the forecast hierarchy has no forecast manager, that role and all its subordinate roles are not included in your forecasts.

If `Nonforecasting` appears next to a role or territory in the forecast hierarchy, it means that a forecast manager has not been assigned to that role or territory.

1. From Setup, enter *Forecasts (Customizable)* in the `Quick Find` box, then select **Forecasts Hierarchy**.

2. Click **Assign Manager** or **Edit Manager** next to a role to assign a user as the forecast manager of that role.

   Roles without roles below them cannot have forecast managers unless your organization has territory management, which supports forecast managers at all levels.

3. Choose a user to be assigned as the forecast manager of the selected role. If no users are available for the role, enable the appropriate user; see Enable Users for Customizable Forecasting.

4. If forecast sharing is enabled, choose the sharing settings:

   - Choose `Require Administrator assistance for forecast sharing` to limit forecast sharing for this view to administrators. This is the default option.

   - Choose `Forecast managers can share their own forecast views` to allow the administrator or the forecast manager to share this view.

5. Click **Save**.

SEE ALSO:

Setting Up Customizable Forecasting

Set Up Your Forecast Hierarchy

Manually Sharing a Forecast

Enabling Customizable Forecasting

📝 **Note:** This information applies to Customizable Forecasting and not Collaborative Forecasts.

Enabling customizable forecasting for your organization allows your forecast users to view and submit their customizable forecasts from the Forecasts tab based on your customizable forecast settings. Customizable Forecasting includes five standard report types. You can't create custom report types with Customizable Forecasting.

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

2. Click **Enable Customizable Forecasting**. If this option is not available, customizable forecasting is already enabled for your organization. After you enable customizable forecasting, three new user permissions are available:

Permission	Description
Override Forecasts	Allows users to override their own forecasts and forecasts for users below them in the forecast hierarchy. All standard profiles except Read Only receive this permission.
Edit Personal Quota	Allows users to change their individual quotas. All standard profiles except Read Only receive this permission. Users with the "Manage Users" permission can always edit any quota. Users can always edit the quotas of users that report directly to them.
View All Forecasts	Allows users to view any forecast regardless of their place in the forecast hierarchy. The System Administrator profile includes this permission.

3. Choose the appropriate opportunity page layouts that you want to include the new Opportunity Forecasts related list. Optionally, choose the `Append...` option to add this related list to page layouts even if users have customized them.

4. Click **Save**.

5. Enable or disable these permissions where necessary..

📝 **Note:** With customizable forecasts, your forecasts still depend on how your `Opportunity Stage` picklist values map to Forecast Categories.

SEE ALSO:

Setting Up Customizable Forecasting

Enable Territory Management

Manually Sharing a Forecast

Manually Sharing a Forecast

📝 **Note:** This information applies to Customizable Forecasting and not Collaborative Forecasts.

Your administrator defines your organization's forecasting hierarchy, which determines which users can view the forecast data. However, your administrator can manually extend sharing privileges for forecast data, and you may be able to manually extend sharing privileges for your own forecast data as well. Manual forecast sharing can only increase access to forecast data; it cannot restrict access for users who already have access. To manually share a forecast, you must be an administrator or a forecast manager who has been given access to share your forecast data.

To see which users can view your forecast or to share your forecast data, do one of the following:

- From Setup, enter `Forecasts Hierarchy` in the `Quick Find` box, then select **Forecasts Hierarchy**, then click **Share** next to the view you want to share.
- Click **Sharing** on the forecast home page to share your own forecast data.

The User and Group Sharing list shows you all the users who currently have access to this forecast data. It also details the level of access they have, whether they can submit a forecast, and the reason they have that access. The reasons a user might have access to forecast data are:

Reason	Description
Administrator	The user is an administrator, or has the "Modify All Data" permission.
Delegated Forecast Manager	A user has access to forecast data that was granted via the **Sharing** button on the forecast.
Forecast Manager	A user has access due to being a forecast manager in the forecast hierarchy.
Owner	The owner can always see his or her own forecast data.
View All Forecasts Permission	The user has the "View All Forecasts" permission.

On the Forecast Sharing Detail page, you can do any of the following:

- To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views.To edit or delete any view you created, select it from the `View` drop-down list and click **Edit**.
- Click **Add** to grant other users or groups access to the forecast data.

    📝 **Note:** Manual sharing extends to the opportunity data that makes up the forecast. If a user has permission to override forecast data, then the user also has permission to override the opportunity forecast data.

- Click **Expand List** to view all users that have access to the forecast data.
- For manual sharing rules that you created, click **Edit** or **Del** next to an item in the list to edit or delete the access level.

SEE ALSO:

Setting Up Customizable Forecasting

Submit Customizable Forecasts in Batches

Submitting forecasts takes a snapshot of forecast data and makes that data available in forecast history and reports. Save time by submitting multiple forecast at once.

📝 **Note:** This information applies to Customizable Forecasting and not Collaborative Forecasts.

To submit multiple forecasts at once:

1. From Setup, enter `Batch Submit` in the `Quick Find` box, then select **Batch Submit Forecasts**.

2. Choose the appropriate forecast period.

3. Select the users that have forecasts you want to submit and click **Add** to add them to the list of `Selected Users for Batch Submit`. Select more than one at a time using **CTRL**+click.

4. Click **Submit**.

5. Click **OK**.

Users can also submit their forecasts individually by clicking **Submit** from their forecast.

SEE ALSO:

Customize Territories

Enterprise Territory Management

Enterprise Territory Management helps you model your sales territories into a logical but flexible structure that connects sales reps to the accounts they sell to.

📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

Salesforce's original territory management feature lets you grant users access to accounts based on criteria such as postal code, industry, revenue, or a custom field relevant to your business. Enterprise Territory Management builds upon the original feature by introducing territory types, territory models, and territory model states. These components let you create and preview multiple territory structures and strategies before you activate and implement the one that works best. Enterprise Territory Management also offers easier assignments between territories, accounts, and opportunities. Custom reports help you organize your territory model for optimum coverage, assess territory effectiveness, and modify your model if necessary. Your team can use Chatter to collaborate as you design and build your territory model.

For comprehensive instructions for implementing this feature, see the *Enterprise Territory Management Implementation Guide*.

IN THIS SECTION:

Enterprise Territory Management Concepts
Learn about the features and related concepts that make Enterprise Territory Management so powerful and easy to use. Understanding these concepts will help you model your territories more effectively.

Manage Your Salesforce Org's Sales Territories

Use Enterprise Territory Management to manage and maintain your org's sales territories. Create territory types, build a model, and then add and test your account assignment rules. When you're satisfied with your model, activate it, then assign users and accounts. Roll it out to your org, and then run reports to assess its impact and make adjustments if necessary.

Create Custom Report Types for Enterprise Territory Management Reports

Organizations using Enterprise Territory Management can run reports that show account assignments, user assignments, and more. Set up custom report types so sales managers and other users can create the reports they need.

Report on Accounts Assigned to Territories

Manage account assignments to sales territories by reporting on which accounts have been assigned to territories. See which accounts belong to which territories.

Report on Territories Without Assigned Accounts

Manage account assignments to sales territories by reporting on which territory models' territories do not have assigned accounts.

Report on Users Not Assigned to Territories

Manage user assignments to sales territories by reporting on which users have not been assigned to territories.

Report on Territories with Assigned Users

Manage user assignments to sales territories finding out which territory models' territories have users assigned. See which assigned users belong to which territories.

Report on Summarizable Account Fields by Territory

Gauge territory size by reporting on summarizable account data, such as annual revenue or number of employees.

Archive a Territory Model

Archiving a territory model deactivates it in your organization, but the model remains in your territory model list, where you can reference its associated assignment rules and the resulting account-to-territory assignments generated by the rules. You can only archive a model that is in the `Active` state. After archiving a model, you cannot return it to the `Active` state or the `Planning` state.

Delete a Territory Model

Delete a territory model if your organization no longer actively uses the model for territory management or reference. You can't delete an active territory: the model must be in `Planning` or `Archived` state.

View and Manage Assignment Rules at the Territory Model Level

If you want to view and manage account assignment rules at a high level, you can. Start from the territory model record to create, edit, or view rules for the model's territories. From the model-level list of rules, you can view rule criteria, or open a rule record to find out which territories it's assigned to, if any.

Activating Assignment Rules and Applying them to Descendant Territories

The ability to apply an assignment rule to descendant territories is available at the territory level only. You cannot apply assignment rules to descendants at the territory model level. Therefore, you only get the option to apply a rule to descendant territories if you access the rule's record from an individual territory.

Disable Enterprise Territory Management

If you wish, you can disable Enterprise Territory Management for your organization and use another means of record sharing.

SEE ALSO:

Enterprise Territory Management Implementation Guide

Enterprise Territory Management Concepts

Learn about the features and related concepts that make Enterprise Territory Management so powerful and easy to use. Understanding these concepts will help you model your territories more effectively.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

IN THIS SECTION:

Territory Type

Territory types help you organize your territories by key characteristics important to your company. Every territory you create must have a territory type. Territory types are used for organizing and creating territories *only:* they do not appear on territory model hierarchies.

Territory Type Priority

Specifying and managing territory type priority information helps you choose the appropriate territory type for territories you create or edit. There are no predefined priority options, so your organization should create its own priority scheme. For example, `001` may indicate that a territory type is the highest priority or the lowest. Make sure your scheme can scale as you add more territory types.

Territory

Territories organize groups of accounts and the Salesforce users who work with those accounts. Territories are created based on territory types.

Territory Model

A territory model represents a complete territory management system for your organization. Modeling lets you create and preview multiple territory structures and different account and user assignments before you activate the model that works best.

Territory Hierarchy

The territory hierarchy shows a model's territory structure and serves as its main interaction point. Start from the hierarchy to create, edit, and delete territories; run assignment rules for territories, and navigate to territory detail pages for more information. From the hierarchy, you can also assign territories to opportunities, run assignment rules at the model level, and activate or archive the model.

Territory Model State

Territory model state indicates whether a territory is in the planning stage, in active use, or archived. Your organization can have only one `active` territory model at a time, but you can create and maintain multiple models in `planning` or `archived` state to use for additional modeling or reference.

How Do Permissions Affect Feature and Data Access in Enterprise Territory Management?

When implementing Enterprise Territory Management, make sure you understand how the feature's permissions affect administration and provide access to records and data.

EDITIONS

Available in: Salesforce Classic

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

Territory Type

Territory types help you organize your territories by key characteristics important to your company. Every territory you create must have a territory type. Territory types are used for organizing and creating territories *only:* they do not appear on territory model hierarchies.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

For example, you might create a territory type called `Universal Telco Named Accounts`, then from that type, create territories that include named accounts. Or you might create a territory type called `US Geographic`, and from that type create territories based on states or regions.

EDITIONS

Available in: Salesforce Classic

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

When you create a territory type, make sure the label and description clearly indicate what kinds of territories should belong to that type.

Territory Type Priority

Specifying and managing territory type priority information helps you choose the appropriate territory type for territories you create or edit. There are no predefined priority options, so your organization should create its own priority scheme. For example, *001* may indicate that a territory type is the highest priority or the lowest. Make sure your scheme can scale as you add more territory types.

When you create a new territory, you select a territory type from the `Territory Type` lookup field. From the lookup, you can view the territory type's assigned priority.

👁 **Example:** Your organization uses territory type priority to reflect your sales strategy for the year. Your organization expects more opportunities within the US east coast than the US west coast in the coming year, so the East Coast territory type is assigned priority *001* and the West Coast territory type is assigned *005*. These priority assignments help those creating territory records make the right territory type choice. At mid-year, you project unexpected growth opportunities in the Great Lakes region, so you create a new territory type called Great Lakes and assign it priority *003* to reflect the change in your sales strategy.

Territory

Territories organize groups of accounts and the Salesforce users who work with those accounts. Territories are created based on territory types.

📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

The territory record shows you assigned users, manually assigned accounts, and rules that assign accounts automatically. A territory can have both parent and child territories. Depending on how your organization assigns accounts, an account may be assigned to more than one territory.

Territory Model

A territory model represents a complete territory management system for your organization. Modeling lets you create and preview multiple territory structures and different account and user assignments before you activate the model that works best.

📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Each territory model features a graphical hierarchy. The hierarchy shows your model's territory structure (including parent and child territories) and lets you create, edit, and delete territories and view their detail pages. Your organization can create and modify up to four different territory models at a time, but only one model can be active at any time. Activate the model you want to use to finalize its user and account assignments.

Territory Hierarchy

The territory hierarchy shows a model's territory structure and serves as its main interaction point. Start from the hierarchy to create, edit, and delete territories; run assignment rules for territories, and navigate to territory detail pages for more information. From the hierarchy, you can also assign territories to opportunities, run assignment rules at the model level, and activate or archive the model.

📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

The name and state of the territory model appear at the top node of the hierarchy (1). Parent and child territories are nested beneath the model name (2). Create or edit new child territories or run their assignment rules (3). Run the filter that assigns territories to opportunities (4). Run assignment rules for all territories in the model (5). Hover to learn when rules were last run (6). Set the model's state to `Active` or `Archive` (7). Toggle to a sorted list view and back to tree view (8).

Territory Model State

Territory model state indicates whether a territory is in the planning stage, in active use, or archived. Your organization can have only one `active` territory model at a time, but you can create and maintain multiple models in `planning` or `archived` state to use for additional modeling or reference.

📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Some states reflect a territory model's lifecycle and others indicate errors in processing when states are changed.

Lifecycle State	Definition
Planning	The default state for every new territory model you create. The `Planning` state lets you preview a model's territory hierarchy before deploying it. Users have no territory-related access to accounts in models that are in the `Planning` state.
Active	The state of a territory model after you activate it and all processing is complete. Only *one* model in your Salesforce organization can be active at a time. A model in `Active` state lets users view model details, including hierarchies, territories, and all assigned accounts and users. Users assigned to territories within an active model can access and modify accounts they are assigned to within that model.
Archived	The state of a territory model after you archive it and all processing is complete. An archived model no longer provides account access to users, but it does let administrators view hierarchy and rule assignments as they were configured when the model was active. Only the *active* model can be archived, and archived models cannot be reactivated. When you archive a territory model or delete a territory on an active model, the `Territory` field is reset to a blank value on opportunity records with those territories assigned.

Error State	Definition
Activation Failed	An error occurred during activation. Check your email for more information from Salesforce.
Archiving Failed	An error occurred during activation. Check your email for more information from Salesforce.

How Do Permissions Affect Feature and Data Access in Enterprise Territory Management?

When implementing Enterprise Territory Management, make sure you understand how the feature's permissions affect administration and provide access to records and data.

> 📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Make sure user permissions provide the appropriate level of access for users. For example, you might want Sales Operations managers and selected Sales managers to be able to manage territories. If so, assign them the "Manage Territories" permission. Anyone who will also create account assignment rules also needs the "View All" permission on Accounts.

EDITIONS

Available in: Salesforce Classic

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

Users who need to:	Require these permissions, roles, or ownership:
• Create territory models and all related records (such as territory types) • View and manage territory models in all states: `Planning`, `Active`, and `Archived` • Activate, archive, delete, or clone territory models • View territory information on territory-assigned account records for territories in models in *all* states (`Planning`, `Active`, and `Archived`)	Manage Territories
• Create or edit account assignment rules	Manage Territories AND View All on Accounts ✎ **Note:** Which fields are available for account assignment rules depends on account field-level security settings, if any. For example, a user has the appropriate permissions for creating account assignment rules, but her profile prevents her from viewing the Account object's `Annual Revenue` field. She will not be able to create account assignment rules that include that field.
• View the Salesforce Setup tree, including territories settings • View the territory model in `Active` state, including its related records (such as territory types and assignment rules) and other elements (such as the territory hierarchy) • View the names of all account records assigned to territories in the `Active` territory model • View territory information on territory-assigned account records for territories in models in the `Active` state only	View Setup and Configuration ✎ **Note:** View Setup and Configuration is enabled by default for the Standard User profile.
View data for models in `Planning` and `Archived` states on reports that include territories, assigned records, or rules	Manage Territories
Manually assign a territory to an opportunity	Sharing access for the opportunity's account. Users who have sharing access to the account can assign any active territory to the opportunity. Those who do not can assign only a territory that is also assigned to the opportunity's account. ✎ **Note:** For manual territory assignments, Salesforce suggests opportunities assigned to the territory's account, but those with sharing access can search for and assign any territory in the active territory model. When a territory is assigned to an opportunity, that opportunity is shared with all Salesforce users assigned to that territory's parent in the territory model hierarchy.

Manage Your Salesforce Org's Sales Territories

Use Enterprise Territory Management to manage and maintain your org's sales territories. Create territory types, build a model, and then add and test your account assignment rules. When you're satisfied with your model, activate it, then assign users and accounts. Roll it out to your org, and then run reports to assess its impact and make adjustments if necessary.

📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Before you begin building your territory model, plan your approach. Choose organizing characteristics such as industry, annual revenue, or location information to divide your organization's accounts into logical segments that work for the way you do business.

IN THIS SECTION:

Enable Enterprise Territory Management

Starting with Winter '15, Enterprise Territory Management is ready to be enabled by administrators in new Salesforce organizations.Organizations created before Winter '15 need to call salesforce.com to enable the feature. Enterprise Territory Management cannot be enabled in existing organizations that have Customizable Forecasting enabled.

Define Enterprise Territory Management Settings

Define and configure settings for Enterprise Territory Management.

Use Chatter to Collaborate on Territory Models

Enable Chatter Feed Tracking on the Territory Model object to collaborate on model development directly within model records. Your team can post and respond to comments, attach files, and get notifications when model states change or key fields are updated.

Build a Territory Model

A territory model organizes all the elements of your organization's territory management plan, including a territory hierarchy, account assignments, and user assignments. Keep your model in the `planning` state as you build your hierarchy, define assignment rules for territories, add users to territories, and run your rules to see the resulting account assignments.

Manually Assign One or More Territories to an Account

Assign one or more territories to an account directly from the account record. Only territories that belong to models in `Planning` or `Active` state can be assigned to accounts.

Manually Assign One or More Assignment Rules to a Territory

Assign one or more object assignment rules to a territory directly from the territory record. Available rules come from the territory model the territory belongs to.

Manually Assign a Territory to an Opportunity

On an opportunity record, you can assign and track the territory whose assigned sales reps work that opportunity. Manual territory assignments are controlled by your sharing access to the opportunity's assigned (parent) account. When you assign a territory to an opportunity, that opportunity is shared with all Salesforce users assigned to that territory's parent in the territory model's hierarchy.

Run the Opportunity Territory Assignment Filter

The opportunity territory assignment filter assigns territories to opportunities based on the filter logic in the Apex class.

Clone a Territory Model

Cloning lets you make a copy of a territory model that you can use to test out different territory characteristics. The new model includes the original's territories, assignment rules, users, and manually assigned accounts. Only models in `Planning`, `Active`, or `Archived` state can be cloned. When cloning is complete, the new model is in `Planning` state.

Assign Users to Territories

Assign users to the territories they will operate in to sell products and services. You can assign users to territories that belong to models in `Active` or `Planning` state, though assignments made within `Planning` state models are for planning purposes only: they *do not* affect user access to records.

Identify Territory Users by Territory Role

Keep track of user functions within territories by creating territory roles and assigning them to territory users as needed. Users can even have different roles in different territories.

Activate a Territory Model

When you're satisfied with the structure of your territory model and its territory account assignments, you're ready to activate it. Remember that you can also maintain models in `Planning` and `Archived` states for further modeling and reference.

Configure Enterprise Territory Management Permissions and Access for Administrators and Users

An important step in implementing Enterprise Territory Management is making sure the right users can access the right territory model elements, records, and record elements.

Run Assignment Rules for a Territory

Run account assignment rules for any territory that has rules defined and belongs to a territory model in `Planning` or `Active` state. If your territory is in `Planning` state, running rules lets you *preview* account assignments. If your territory is in `Active` state when you run rules, accounts are assigned to territories according to your rules.

Find Out Which Territories an Assignment Rule Applies To

If you use rules to assign accounts to territories, it can be helpful to find out which territories a single rule applies to.

SEE ALSO:

Enterprise Territory Management Concepts

Enterprise Territory Management

Enable Enterprise Territory Management

Starting with Winter '15, Enterprise Territory Management is ready to be enabled by administrators in new Salesforce organizations.Organizations created before Winter '15 need to call salesforce.com to enable the feature. Enterprise Territory Management cannot be enabled in existing organizations that have Customizable Forecasting enabled.

> 📝 Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

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

2. Click **Enable Enterprise Territory Management**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable Enterprise Territory Management:
- "Customize Application"

Define Enterprise Territory Management Settings

Define and configure settings for Enterprise Territory Management.

📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

IN THIS SECTION:

[Define Default User Access for Territory Records](#)

Specify the *default* settings for how users can access and modify records associated with the sales territories you set up. The access provided by default settings can be modified when you create or edit an individual territory.

[Enable Filter-Based Opportunity Territory Assignment](#)

Enable and configure filter-based assignment of territories to opportunities..

Define Default User Access for Territory Records

Specify the *default* settings for how users can access and modify records associated with the sales territories you set up. The access provided by default settings can be modified when you create or edit an individual territory.

📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

The standard record access settings apply to accounts and opportunities. If your organization uses `Private` default internal access for contacts or cases, you can also set access for those records.

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

2. Select the default access levels you want for accounts and opportunities.

3. If applicable, select the default access levels for contacts and cases.

4. Click **Save**.

Enable Filter-Based Opportunity Territory Assignment

Enable and configure filter-based assignment of territories to opportunities..

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

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

2. Enable Filter-Based Opportunity Territory Assignment.

3. If your organization is using the Apex code Salesforce provides, first create the class and then return to this Settings page and enter the class name: `OppTerrAssignDefaultLogicFilter`. If you opt to use your own code for the Apex class, you'll come back and enter the name of the class that you create.

4. If you want to run the filter-based opportunity territory assignment job when opportunities are created, select that option.

5. Save your settings.

Use Chatter to Collaborate on Territory Models

Enable Chatter Feed Tracking on the Territory Model object to collaborate on model development directly within model records. Your team can post and respond to comments, attach files, and get notifications when model states change or key fields are updated.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

After you enable and configure Chatter Feed Tracking, anyone with access to a territory model record can use Chatter to collaborate on that model. Those who follow the record will get updates in their own Chatter feeds when tracked fields are updated.

1. Make sure Chatter has been enabled for your organization.

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

3. Select the Territory Model object. Enable Feed Tracking, then select the territory model fields you want to track.

4. Click **Save**.
   The Chatter feed appears at the top of your organization's territory model records.

5. Make sure to tell others who maintain territory models that they can now use Chatter to follow and collaborate on territory models directly from model records.

Build a Territory Model

A territory model organizes all the elements of your organization's territory management plan, including a territory hierarchy, account assignments, and user assignments. Keep your model in the `planning` state as you build your hierarchy, define assignment rules for territories, add users to territories, and run your rules to see the resulting account assignments.

> ✎ Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

IN THIS SECTION:

1. Create Territory Types

   Territory types help you categorize and define individual territories. Creating territory types is the first step in building your territory model in Salesforce.

2. Create a Territory Model Record

   The first step in building your territory model is creating the record that connects the other elements, including territories, user assignments, and account assignments. When you create a territory model record, Salesforce generates a territory hierarchy for it.

3. Create Territories

   Create territories as you build your organization's territory model. When you create a territory, it appears on the model's territory hierarchy.

4. Create and Preview Territory Account Assignments

   You assign accounts to territories by either creating rules that assign them automatically or adding them manually. Rules can be configured to apply to both parent territories and their descendents. Manual assignments apply only to the territory where they are made.

Create Territory Types

Territory types help you categorize and define individual territories. Creating territory types is the first step in building your territory model in Salesforce.

> ✎ Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Examples of territory types you might create include *Named Accounts*, *Direct Accounts*, and *Overlay Sales*.

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

2. Click **New Territory Type**.

3. Enter a label and a description. In your description, make sure you clearly indicate what kinds of territories should belong to that type.

4. Specify a territory type priority.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To build a territory model:
- "View Setup and Configuration"

  AND

  "Manage Territories"

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create a territory type:
- "View Setup and Configuration"

  AND

  "Manage Territories"

5. Click **Save**.

SEE ALSO:

    Territory Type Priority

Create a Territory Model Record

The first step in building your territory model is creating the record that connects the other elements, including territories, user assignments, and account assignments. When you create a territory model record, Salesforce generates a territory hierarchy for it.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Your organization's Salesforce edition determines the number of territory models you can create in production and sandbox orgs. This limit includes models created by cloning.

Edition	Number of Models in Production Orgs	Number of Models in Sandbox Orgs
Developer	4	4
Enterprise	2	2
Performance	4	4
Unlimited	4	4

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

2. Click **New Territory Model**.

3. Define the label and description fields.

4. Click **Save**.

Create Territories

Create territories as you build your organization's territory model. When you create a territory, it appears on the model's territory hierarchy.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

By default, each territory model can have up to 1,000 territories.

1. Open the territory model where you want to create the territory.

2. If you need to, select **Tree View** from the drop-down to show the model's territory hierarchy, including any existing territories.

3. To create a top-level territory, hover over the territory model name and click **Create Territory**. To create a child territory from an existing territory, hover over the territory name and click **Create Territory**.

4. On the New Territory page, define the territory: give it a meaningful label, choose its territory type. If the territory requires *different* user access for accounts and opportunities than the *default* user access for those records, define the territory's user access levels.

5. Click **Save**.

Create and Preview Territory Account Assignments

You assign accounts to territories by either creating rules that assign them automatically or adding them manually. Rules can be configured to apply to both parent territories and their descendents. Manual assignments apply only to the territory where they are made.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Before you commit to your model's account assignments, you should preview them by running assignment rules and related reports while the model is in `Planning` state. When you're satisfied with your planned account assignments, change the model to `Active` state. Then, run assignment rules again so that your territories include affected accounts that were created or updated during the activation process.

IN THIS SECTION:

[Use Rules to Assign Accounts to Territories](#)

Create and run rules that automatically assign new or edited accounts to territories. A rule identifies one or more characteristics you use to define that territory, and tells Enterprise Territory Management to assign accounts with those characteristics to that territory automatically. If your territory is in `Planning` state, running rules lets you *preview* account assignments. If your territory is in `Active` state when you run rules, accounts are assigned to territories according to your rules.

[Manually Assign Accounts to a Territory](#)

Accounts that are not assigned to territories by rules can be assigned manually to one or more territories, one territory at a time. Manual assignment is useful for accounts that have unique characteristics and therefore can't be assigned by rules.

[Preview Territory Account Assignments](#)

Before you activate a territory model, you should preview and validate its territory account assignments. Preview assignments by running assignment rules when the model is in `Planning` state. Also verify your manual assignments.

[Identify Users in Territories Assigned to an Account](#)

Accounts and users are assigned to territories independently, but when an account is assigned to a territory, that territory's users have access to the account. It's easy to find out who those users are by looking at the account record.

Use Rules to Assign Accounts to Territories

Create and run rules that automatically assign new or edited accounts to territories. A rule identifies one or more characteristics you use to define that territory, and tells Enterprise Territory Management to assign accounts with those characteristics to that territory automatically. If your territory is in `Planning` state, running rules lets you *preview* account assignments. If your territory is in `Active` state when you run rules, accounts are assigned to territories according to your rules.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

> **Tip:** It's a best practice *not* to assign a rule to a territory if that rule is a child of another rule *already assigned* to the territory. To find out what rules apply to a territory, just open the territory's record detail page and look at the Assignment Rules Assigned to this Territory related list. If a rule has `Apply to Child Territories` selected, do not assign the rule separately to child territories.

1. From the territory model hierarchy, open the territory where you want to create a rule.

2. On the detail page, in the Assignment Rules Defined in this Territory related list, click **New**.

3. > **Note:** If your org has enabled state and country picklists, territory assignment rules using states as a criteria must use `contains` matching instead of `equals` matching.

   On the rule edit page, enter a name for the new rule and define selection criteria.

4. If you want the rule to also apply to the current territory's descendents, select the **Apply to child territories** checkbox.

5. If you want the rule to run automatically when a user creates or updates an account, select the **Active** checkbox.

   > **Note:** For account updates, these conditions are required for the territory rules to run.
   >
   > - If the account is updated via the UI, **Evaluate this account against territory rules on save** is selected.
   > - If the account is updated via API, `AssignmentRuleHeader` is specified.

6. Click **Save** to save the rule and return to the territory detail page.

7. (Optional) In the Assignment Rules Defined in This Territory related list, click **Run Rules**.
   You'll receive an email when the process is complete.

> **Example:** Rules can work together within territories and child territories. For example, you create a territory called Western States, with child territories Washington, Oregon, and California. From the Western States territory record, you create a rule that assigns accounts in Washington, Oregon, and California to that territory. You apply that rule to child territories and then, from the California territory record, you create a rule that assigns accounts in California to the California territory.
>
> For any child territories for the California territory, you don't need to specify the state in the criteria if you mark the California territory rule as inheritable to child territories. Instead, you can use more specific criteria, such as ZIP code or industry.

SEE ALSO:

[Activating Assignment Rules and Applying them to Descendant Territories](#)

Manually Assign Accounts to a Territory

Accounts that are not assigned to territories by rules can be assigned manually to one or more territories, one territory at a time. Manual assignment is useful for accounts that have unique characteristics and therefore can't be assigned by rules.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From the territory model hierarchy, open the territory where you want to assign one or more accounts.

2. On the territory's detail page, in the Manually Assigned Accounts related list, click **Add Accounts** to see a list of your organization's accounts. Adjust the list view if you need to.

3. In the `Available` related list, select the checkbox for each account you want to assign. If you need to view more records, click **More** beneath the list.
   Each selected account appears in the Selected related list.

4. Click **Assign**.

Preview Territory Account Assignments

Before you activate a territory model, you should preview and validate its territory account assignments. Preview assignments by running assignment rules when the model is in `Planning` state. Also verify your manual assignments.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

> **Important:** To protect data quality, you cannot modify a territory until you receive the email confirming that the rules have been run successfully. If rules do not run successfully, follow instructions provided in the email for troubleshooting specific issues.

1. Open the record for the territory model whose assigned accounts you want to preview and click **View Hierarchy**.

2. Verify that the model is in `Planning` state.

3. Click **Run All Rules**.
   When rules are finished running, we'll send an email to let you know. Processing may take some time, depending on the size and complexity of your organization.

4. From the territory model hierarchy, open each territory and descendent affected assignment rules. Also open territories that have manual account assignments.

5. On the territory detail page, click **View Accounts** to see assigned accounts. The `Method` column indicates how each account was assigned: by a rule or manually.

> **Note:** If you make changes to the rules for a territory, you must run rules again to view those changes. In this case, you may want to run rules on that territory only. To do so, navigate to the territory's detail page, scroll to the Assignment Rules Defined in this Territory related list, and click **Run Rules**.

Identify Users in Territories Assigned to an Account

Accounts and users are assigned to territories independently, but when an account is assigned to a territory, that territory's users have access to the account. It's easy to find out who those users are by looking at the account record.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Open the account record that has territories assigned.

2. Identify the users from the Users in Assigned Territories related list.

> **Note:** The `Modified Date` field in this related list tells the last time the user territory association record was modified. It may or may not indicate when the user was assigned to the territory.

> **Example:** Six sales reps are assigned to the East Coast territory. Because XYZ Publishing is also assigned to the East Coast territory, the six sales reps in the territory appear in the Users in Assigned Territories related list on the XYZ Publishing account record.

Manually Assign One or More Territories to an Account

Assign one or more territories to an account directly from the account record. Only territories that belong to models in `Planning` or `Active` state can be assigned to accounts.

> 📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Open the account you want to assign territories to.

2. On the account's detail page, in the Assigned Territories related list, click **Assign Territories** to see a list of your organization's territories. Adjust the list view if you need to.

3. Select the territory model that contains the territories you want to associate.

4. In the `Available` related list, select the checkbox for each territory you want to assign. If you need to view more records, click **More** beneath the list.
   Each selected territory appears in the Selected related list.

5. Click **Assign**.

Manually Assign One or More Assignment Rules to a Territory

Assign one or more object assignment rules to a territory directly from the territory record. Available rules come from the territory model the territory belongs to.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Territories can have up to 15 assignment rules each.

1. Open the territory you want to assign rules to.

2. On the territory's detail page, in the **Assignment Rules Assigned to This Territory** related list, click **Assign Rules** to see a list of rules available in the model.

3. In the `Available` related list, hover over the names of available rules to view the details of their criteria. Select the checkbox for each rule you want to assign to the territory. If you need to view more rules, click **More** beneath the list.
   Each selected rule appears in the Selected related list.

4. Apply selected rules to child territories as appropriate.

5. Click **Assign**.

Manually Assign a Territory to an Opportunity

On an opportunity record, you can assign and track the territory whose assigned sales reps work that opportunity. Manual territory assignments are controlled by your sharing access to the opportunity's assigned (parent) account. When you assign a territory to an opportunity, that opportunity is shared with all Salesforce users assigned to that territory's parent in the territory model's hierarchy.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Users who *have* sharing access to the opportunity's account can assign *any* territory from the active model to the opportunity. Those who *do not* can assign *only* a territory that is *also* assigned to the opportunity's account. For manual territory assignments, Salesforce suggests opportunities assigned to the territory's account, but those with sharing access can search for and assign any territory in the active territory model.

1. Open the opportunity record.

2. In the `Territory` field, specify the territory you want to assign.

3. Save the opportunity record.

> **Example:** The Utel.com account has six opportunities and two territories (East Coast and West Coast). They can assign East Coast, West Coast, or any other territory within the active model to any or all of those six opportunities. One of their sales reps has sharing access to the account assigned to one of the opportunities, so she can assign any territory to that opportunity. For the other five opportunities, she does not have sharing access to assigned accounts, for each of those, she can only assign a territory that is already assigned to the opportunity's assigned account.

Run the Opportunity Territory Assignment Filter

The opportunity territory assignment filter assigns territories to opportunities based on the filter logic in the Apex class.

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

2. Verify these settings.

   - Filter-based opportunity territory assignment is enabled.
   - An Apex class is specified.

3. From Setup, enter `Manage Territories` in the `Quick Find` box, then select **Territory Models**.

4. View the active territory model's hierarchy.

5. Click **Run Opportunity Filter**, and then select options for the opportunities and date ranges to include.

6. Run the opportunity filter.
   When the job is complete, you receive an email.

Clone a Territory Model

Cloning lets you make a copy of a territory model that you can use to test out different territory characteristics. The new model includes the original's territories, assignment rules, users, and manually assigned accounts. Only models in `Planning`, `Active`, or `Archived` state can be cloned. When cloning is complete, the new model is in `Planning` state.

> Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

After the cloning process is complete, the new territory model it creates is in `Planning` state.

1. Open the territory model you want to clone.

2. Click **Clone**.

3. Define the label and description fields.

4. Click **Save**.
   The model state changes to `Cloning` while Salesforce processes your request. Cloning may take some time, depending on the size and complexity of your model. When the process is complete, we'll send you an email to let you know

Assign Users to Territories

Assign users to the territories they will operate in to sell products and services. You can assign users to territories that belong to models in `Active` or `Planning` state, though assignments made within `Planning` state models are for planning purposes only: they *do not* affect user access to records.

> 📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From the territory model hierarchy, open the territory where you want to assign users.
2. On the territory's detail page, in the Assigned Users related list, click **Manage Users**.
3. On the Assign Users page, select or search for the user you want to add.
4. Click **Save**.

Identify Territory Users by Territory Role

Keep track of user functions within territories by creating territory roles and assigning them to territory users as needed. Users can even have different roles in different territories.

> 📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

> 👁 **Example:** For example, you might create roles like Territory Owner, Sales Manager, Product Specialist, or Sales Representative.

IN THIS SECTION:

Define a Picklist for Territory User Roles

Add territory roles to the UserTerritoryAssociation object's `Role in Territory` picklist so you can select roles for territory users. The Role in Territory picklist you define can be used for all territories in `Active` or `Planning` state.

Assign Territory Roles to Users

Assign territory roles to identify the roles of users within territories.

Define a Picklist for Territory User Roles

Add territory roles to the UserTerritoryAssociation object's `Role in Territory` picklist so you can select roles for territory users. The Role in Territory picklist you define can be used for all territories in `Active` or `Planning` state.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From the object management settings for user territory associations, go to the fields area.

2. Click **Role in Territory**, and then click **New**.

3. Enter the picklist values you want and click **Save**.
   The values you entered are now available for selection from the `Role in Territory` picklist on the territory's Users Assigned edit page.

Assign Territory Roles to Users

Assign territory roles to identify the roles of users within territories.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure you have created a Role in Territory picklist so you have some roles to select for users.

2. Open the record of the territory where you want to assign territory roles.

3. In the Assigned Users list, click **Edit** next to the name of a user to whom you're assigning a territory role.

4. From the `Role in Territory` picklist, select the user's territory role.

5. Click **Save**.

Activate a Territory Model

When you're satisfied with the structure of your territory model and its territory account assignments, you're ready to activate it. Remember that you can also maintain models in `Planning` and `Archived` states for further modeling and reference.

> ✏️ **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

> ⊘ **Important:** Only one model can be in the `Active` state at one time in your organization, and you can only activate a model that is in the `Planning` state. After activating a model, you cannot reset it to `Planning` state: you can only set it to `Archived` state.

1. If you need to, preview account assignments before activating the model.

2. Open the record for the territory model you want to activate and click **View Hierarchy**.

3. Click **Activate**.
   The model state changes to `Activating` while Salesforce processes your request. Activation may take some time, depending on the size and complexity of your model. When the process is complete, we'll send you an email to let you know.

SEE ALSO:

Territory Model State

Configure Enterprise Territory Management Permissions and Access for Administrators and Users

An important step in implementing Enterprise Territory Management is making sure the right users can access the right territory model elements, records, and record elements.

> ✏️ **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure you understand how permissions affect territory model and record access in Enterprise Territory Management.

2. Assign user permissions as needed.

3. Add the Assigned Territories related list to your account page layouts. This list lets administrators manually assign territories to accounts and it lets users can identify which territories are assigned to their accounts. Make sure the related list includes the standard and custom fields (if any) that administrators and users need to view.

4. Add the Users in Assigned Territories related list to your account page layouts. This list lets administrators and users see all users assigned to the territories that are assigned to an account, according to their permissions. Make sure the related list includes the standard and custom fields (if any) that administrators and users need to view.

5. Add the `Territory` field to your Opportunity page layouts. This field lets administrators and sales managers manually assign a territory to an opportunity from a list of the territories assigned to the opportunity's account. Add the `Territory Name` and `Territory Description` fields to Opportunity list views and reports so that users can identify assigned territories there.

6. Add any custom buttons, links, or actions you've created to territory page layouts.

SEE ALSO:

[How Do Permissions Affect Feature and Data Access in Enterprise Territory Management?](#)

Run Assignment Rules for a Territory

Run account assignment rules for any territory that has rules defined and belongs to a territory model in `Planning` or `Active` state. If your territory is in `Planning` state, running rules lets you *preview* account assignments. If your territory is in `Active` state when you run rules, accounts are assigned to territories according to your rules.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Open the hierarchy for the territory model the territory model belongs to.

2. In the tree view or list view, find the territory you want to run rules for.

3. In list view, click **Run Rules**. In tree view, hover over the territory name and then click **Run Rules**. If you want to view the territory record's details, including its assigned rules, *before* you run its rules, open the record and then click the **Run Rules** button in the Assignment Rules Assigned to This Territory related list.

Find Out Which Territories an Assignment Rule Applies To

If you use rules to assign accounts to territories, it can be helpful to find out which territories a single rule applies to.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From Setup, enter `Territory Models` in the `Quick Find` box, then select **Territory Models** to view a list of your organization's territory models.

2. Find the model in which the rule operates and click **View Rules** to see a list of all the rules associated to the model and its territories.

3. Click the rule name and look for the territories it applies to in the Assigned Territories related list.

Create Custom Report Types for Enterprise Territory Management Reports

Organizations using Enterprise Territory Management can run reports that show account assignments, user assignments, and more. Set up custom report types so sales managers and other users can create the reports they need.

📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure you're familiar with custom report types and the general steps for creating and maintaining them.

2. Create custom report types relating these objects and configuring them as necessary. Make all fields available for reporting. Add each report to the Territory Management report type category. Provide a clear name and description for each report type so users who create reports can understand which one to use for their needs.

Report (Topics for selected reports are linked)	A (Primary Object)	B	C
Accounts assigned to territories	Accounts	Territories Select **"A" records must have related "B" records**.	–
Accounts not assigned to territories	Accounts	Territories Select **"A" records may or may not have related "B" records**.	–
Territories with assigned accounts	Territory Models	Territories	Territory-Assigned Records Select **"B" records must have related "C" records**.
Territories without assigned accounts	Territory Models	Territories	Territory-Assigned Records Select **"B" records may or may not have related "C" records**.
Users assigned to territories	Users	Territories Select **"A" records must have related "B" records**.	–

Report (Topics for selected reports are linked)	A (Primary Object)	B	C
Users not assigned to territories	Users	Territories Select **"A" records may or may not have related "B" records**.	–
Territories with assigned users	Territory Models	Territories	Users Select **"B" records must have related "C" records**.
Territories without assigned users	Territory Models	Territories	Users Select **"B" records may or may not have related "C" records**.
Summarizable account information by territory	Accounts	Territories Select **Each "A" record must have at least one related "B" record**.	–

3. Deploy the report types you want to make available to users.

4. Let users know that they can create reports using these custom report types.

Report on Accounts Assigned to Territories

Manage account assignments to sales territories by reporting on which accounts have been assigned to territories. See which accounts belong to which territories.

> 📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Accounts and Territories objects. It should specify that the Accounts object *must* have related Territory records and it should make all fields on these objects available for reporting.

2. Create your report: click the Reports tab, then click **New Report**.

3. From the Territory Management category, select the custom report type created for this report.

4. Click **Create**.

5. Make sure that the Accounts field `Account Name` and the Territories field `Label` appear on the report. If they do not, add them.

6. (Optional) Filter the report results. To show data from territory models in `Active` state *only*, from the `Filters` drop-down list, select `Field Filter`. Configure the filter options to show `Territory Model: Label equals <name of active territory model>` and then click **OK**. From the **Show** field, to filter by account ownership, select `My accounts`, `My team's accounts`, or `My territory teams' accounts`. To filter by user territory assignment, select `My territories' accounts`.

   > ⛔ **Important:** If you later activate a different territory model, make sure you update the territory model name variable in this report.

7. Add any other fields you find useful for this report.

8. Save the report and run it.

9. (Optional) Summarize information by Accounts field `Account Name` to show each account along with the number of territories it's assigned to.

Report on Territories Without Assigned Accounts

Manage account assignments to sales territories by reporting on which territory models' territories do not have assigned accounts.

> 📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Territory Models, Territories, and Territory-Assigned Records objects. It should specify that the Territories object *may or may not* have related Territory-Assigned records and should make all fields on these objects available for reporting.

2. Create your report: click the Reports tab, then click **New Report**.

3. From the Territory Management category, select the custom report type created for this report.

4. Click **Create**.

5. Make sure that the Territory Models field `Label` and the Territories field `Label` appear on the report. If they do not, add them.

6. From the `Filters` drop-down list, select `Cross Filter`. Configure the filter options to show `Territories without Territory-Assigned Records` and then click **OK**. Configure the filter options to show `Object equals Account.`

7. If you want to show data from territory models in `Active` state *only*, from the `Filters` drop-down list, select `Field Filter`. Configure the filter options to show `State equals Active` and then click **OK**.

8. Add any other fields you find useful for this report.

9. Save the report and run it.

Report on Users Not Assigned to Territories

Manage user assignments to sales territories by reporting on which users have not been assigned to territories.

> 📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Users and Territories objects. It should specify that the Users object *may or may not* have related Territories records and should make all fields on these objects available for reporting.

2. Create your report: click the Reports tab, then click **New Report**.

3. From the Territory Management category, select the custom report type created for this report.

4. Click **Create**.

5. Make sure that the Users field `Full Name` and the Territories field `Label` appear on the report. If they do not, add them.

6. From the `Filters` drop-down list, select `Cross Filter`. Configure the filter options to show `Users without Territories` and then click **OK**.

7. If you want to show data from territory models in `Active` state *only*, from the `Filters` drop-down list, select `Field Filter`. Configure the filter options to show `Territory Model: Label equals <name of active territory model>` and then click **OK**.

> ⛔ **Important:** If you later activate a different territory model, make sure you update the territory model name variable in this report.

8. Add any other fields you find useful for this report.

9. Save the report and run it.

Report on Territories with Assigned Users

Manage user assignments to sales territories finding out which territory models' territories have users assigned. See which assigned users belong to which territories.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Territory Models, Territories, and Users objects. It should specify that the Territory object *must* have related Users records and make all fields on these objects available for reporting.

2. Create your report: click the Reports tab, then click **New Report**.

3. From the Territory Management category, select the custom report type created for this report.

4. Click **Create**.

5. Make sure that the Territory Models field `Label`, the Territories field `Label`, and the Users field `Full Name` appear on the report. If they do not, add them.

6. If you want to show data from territory models in `Active` state *only*, from the `Filters` drop-down list, select `Field Filter`. Configure the filter options to show `State equals Active` and then click **OK**.

7. Add any other fields you find useful for this report.

8. Save the report and run it.

9. (Optional) Summarize information by Territory object field `Label` to show each territory with the users assigned to it.

Report on Summarizable Account Fields by Territory

Gauge territory size by reporting on summarizable account data, such as annual revenue or number of employees.

> 📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Accounts and Territories objects. It should specify that the Accounts object *must have* at least one Territory object record and should make all fields on these objects available for reporting.

2. Create your report: click the Reports tab, then click **New Report**.

3. From the Territory Management category, select the custom report type created for this report.

4. Click **Create**.

5. Select `Matrix Format` for the report.

6. From the Territories field list, select the `Label` field. Drag it to create a row grouping.

7. From the Accounts field list, select the `Account Name` field. Drag it to create a row grouping.

8. From the Accounts field list, select summarizable fields, such as `Annual Revenue` and `Employees`, to show those totals. Drag them into the summarizable fields area. When prompted, select the `Sum` checkbox.

9. (Optional) Filter the report results. From the **Show** field, to filter by account ownership, select `My accounts`, `My team's accounts`, or `My territory teams' accounts`. To filter by user territory assignment, select `My territories' accounts`.

10. Add any other fields you find useful for this report.

11. Run the report and make sure it shows the data and the arrangement you want.

12. Summarize information by the Territories field `Label` to total all the summarizable field values by territory.

13. Save the report.

Archive a Territory Model

Archiving a territory model deactivates it in your organization, but the model remains in your territory model list, where you can reference its associated assignment rules and the resulting account-to-territory assignments generated by the rules. You can only archive a model that is in the `Active` state. After archiving a model, you cannot return it to the `Active` state or the `Planning` state.

> 📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

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

2. Click **Edit** next to the territory model you want to archive.

3. Choose **Archiving** from the `State` drop-down.
   The model state changes to `Archiving` while Salesforce processes your request. When processing is complete, the model state changes to `Archived`, and you receive a confirmation via email. This may take some time, depending on the size and complexity of your organization.

Delete a Territory Model

Delete a territory model if your organization no longer actively uses the model for territory management or reference. You can't delete an active territory: the model must be in `Planning` or `Archived` state.

📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Deleting a territory model also deletes all its associated territories and account assignments. You can't cancel the process or restore a deleted model. The process may take several hours, so we'll send you an email when it's complete.
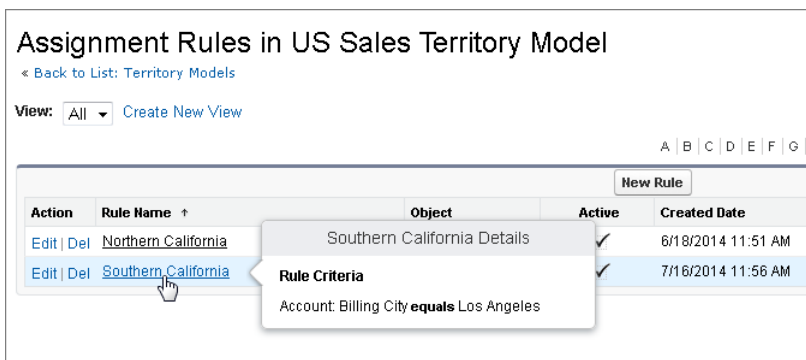
1. From Setup, enter `Territory Models` in the `Quick Find` box, then select **Territory Models**.

2. Find the model in the list. Check the value in the **State** column to make sure the model is in the `Planning` or `Archived` state.

3. Click **Del**.

4. Later, check your email for confirmation that the deletion process is complete.

View and Manage Assignment Rules at the Territory Model Level

If you want to view and manage account assignment rules at a high level, you can. Start from the territory model record to create, edit, or view rules for the model's territories. From the model-level list of rules, you can view rule criteria, or open a rule record to find out which territories it's assigned to, if any.

📝 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

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

2. Click **View Rules** next to the territory model whose rules you want to manage.

3. On the Assignment Rules list view, you can create a new rule, open a rule record for complete details, or hover over the rule name to view its criteria.

Activating Assignment Rules and Applying them to Descendant Territories

The ability to apply an assignment rule to descendant territories is available at the territory level only. You cannot apply assignment rules to descendants at the territory model level. Therefore, you only get the option to apply a rule to descendant territories if you access the rule's record from an individual territory.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

With this restriction in mind, make sure you create or edit a rule record from the appropriate place. Starting from the territory record gives you the most options. Make sure you activate all assignment rules you want to use: inactive rules *do not* affect assignments for associated territories or any descendant territories they have been applied to.

> **Example:** For example, you have a territory model called US, and its hierarchy has two territories: Eastern States and Western States. The Eastern States territory has an assigned rule called Eastern States Accounts. If you open the record for the territory model, US, then click `View Rules` and from there click **Edit** to edit the Eastern States Accounts rule record, the final step lets you activate the rule.
>
> If you start from the Eastern States territory record, then click **Edit** next to the Eastern States Accounts rule record, in addition to the step where you activate or deactivate the rule, you'll see an additional step that lets you apply the rule to the Eastern States territory's descendants.

Disable Enterprise Territory Management

If you wish, you can disable Enterprise Territory Management for your organization and use another means of record sharing.

> **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

> **Important:** If you disable Enterprise Territory Management, your users lose record access that's based on territory assignments, and your organization no longer has access to territory management data. If you re-enable Enterprise Territory Management, you may lose data that had previously been available through the feature.

1. If you haven't already, archive your active territory model before disablingEnterprise Territory Management.

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

3. Click **Disable Territory Management 2.0**.

Original Territory Management

Enable Territory Management

Before you enable Territory Management, contact Salesforce, and then check that your organization meets the prerequisites.

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Territory management is not enabled by default in Salesforce. To request territory management for your organization, contact Salesforce.

> **Note:** Original Territory Management is available only with Customizable Forecasts and is not supported with Collaborative Forecasts. If original Territory Management is enabled, you can no longer use Collaborative Forecasts. The newer Enterprise Territory Management can't be used with Customizable Forecasts. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

Ensure that you meet the following prerequisites before enabling territory management:

- To enable territory management, your organization must be using customizable forecasting. If you do not know whether you have customizable forecasting, see Do I Have Customizable Forecasting?.
- To prepare your organization for territory management, follow the steps in the Deploying Territory Management Guide.

After you have completed the prerequisites, you will be ready to turn on territory management for your organization:

1. In Salesforce, from Setup, enter `Territory` in the `Quick Find` box, then select **Territory Settings**.

2. Optionally, change the organization-wide territory management settings that are configurable from the Territory Settings page. See Configure Territory Management Settings on page 305.

3. There are two different options for enabling territory management, which depend on your preference to retain or purge pre-existing forecast data. Click either **Enable Territory Management** or **Enable Territory Management from Scratch**.

   What the Enable Territory Management Button Does

   When you click this button, your organization's current forecast hierarchy and forecast data are automatically copied to the territory hierarchy as follows:

   - The name of your organization is set as the top of the territory hierarchy.
   - For each role in the forecast hierarchy, a corresponding territory is created in the new territory hierarchy.
   - Manual forecast sharing settings on the roles are copied to the new territory. For more information on manual forecast sharing, see Manually Sharing a Forecast on page 270.
   - Active Salesforce users are added to territories based on their roles.
   - Opportunities are assigned to the opportunity owner's territory.
   - Accounts are not assigned anywhere in the territory hierarchy.
   - Until you add or edit territories, your forecasts work the same as they did before you enabled territory management.

   What the Enable Territory Management from Scratch Button Does

   When you click this button, the following occurs:

   - All pre-existing forecast data is deleted.
   - An empty territory hierarchy is created.

Using this button is only recommended when you are setting up a brand new organization in Salesforce that does not have an existing forecast hierarchy.

> ⚠ **Warning:** *Irreversible data loss* can result from clicking **Enable Territory Management from Scratch**.

4. Configure territory-related fields, page layouts, and user permissions:

   • From the object management settings for accounts, go to Page Layouts and add the `Territories` and `Exclude from territory assignment rules` fields to account page layouts. For each account page layout, you can set whether users can choose to run account assignment rules when they save accounts. You can also set whether account assignment rules run by default whenever accounts are saved.:

   • From the object management settings for opportunities, go to Page Layouts and add the `Territory` field to opportunity page layouts.

   • To allow a user to be an administrator of the territory hierarchy, grant them the "Manage Territories" permission using permission sets or profiles. Users that had the "Customize Application" permission before you enabled territory management are automatically given the "Manage Territories" permission.

5. To begin working with your new territory hierarchy, from Setup, enter `Hierarchy` in the `Quick Find` box, then select **Territory Hierarchy**. See Building Your Territory Hierarchy on page 306.

SEE ALSO:
   Configure Territory Management Settings
   Administrator setup guide: Deploying Territory Management

Configure Territory Management Settings

> 📝 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

You can set default account, contact, opportunity, and case access levels for new territories, as well as whether forecast managers can administer the territories located below them in the territory hierarchy.

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

2. Choose default access levels for accounts, contacts (depending on your organization-wide default setting), opportunities, and cases. These are the access levels that will be selected by default when a new territory is created. For descriptions of these fields, see Territory Fields on page 309.

   > 📝 **Note:** These settings are not retroactive and do not affect territories that already exist.
   >
   > When creating or editing an individual territory, you can override these default access levels. See Create Territories on page 308.

3. Optionally, check `Forecast managers can manage territories`. When this box is checked, forecast managers can administer subordinate territories: they can manage users, manually add accounts, and manage account assignment rules for

territories that are below their immediate territory. Also, they can add child territories to both their immediate territory and lower territories. To learn more about forecast managers, see Assigning Forecast Managers in Your Forecast Hierarchy on page 268.

SEE ALSO:

Enable Territory Management

Display and Edit Territories

Building Your Territory Hierarchy

Building Your Territory Hierarchy

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

> **Note:** If you clicked the **Enable Territory Management** button to enable territory management, your existing forecast hierarchy was used as the basis of the territory hierarchy.

To work with your organization's territory hierarchy, from Setup, enter `Hierarchy` in the `Quick Find` box, then select **Territory Hierarchy**. The following terms are used when referring to territories in the hierarchy.

Parent Territory

A territory that is located immediately above another territory in the hierarchy. A territory has exactly one parent territory in the hierarchy, except for the top-level territory which does not have a parent.

Child Territory

A territory that is immediately below another territory in the hierarchy. A parent territory can have an unlimited number of child territories.

Sibling Territory

Child territories that share the same parent territory.

Choose an option from the drop-down list to change how the territory hierarchy is displayed:

Show in tree view

See a visual representation of the parent-child relationships between your territories. Click **Expand All** to see all territories, or **Collapse All** to see only top-level territories. To expand or collapse an individual node, click the plus (+) or minus (-) icon.

Show in sorted list view

See a territory list that you can sort alphabetically by territory name, parent territory (**Reports to**), or description.

To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views.To edit or delete any view you created, select it from the `View` drop-down list and click **Edit**.

Show in list view

See a list of territories and their children, grouped alphabetically by the name of the top-level territory. The columns are not sortable. This view is not available for hierarchies with more than 1,000 territories.

Each view provides links for you to create, edit, and delete territories.

SEE ALSO:

Display and Edit Territories

Display and Edit Territories

From the territory detail page, you can view and modify different aspects of the territory, including related territories, assigned users, and included accounts.

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Displaying Territories

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

2. Select the name of the territory you want to view.

Viewing Related Territories

The `Hierarchy` list at the top of the territory detail page shows how this territory is related to the top-level territory in the territory hierarchy. To see the names of other territories that share parent territory of this one, refer to the `Siblings` list. In either list, you can click a territory name to view that territory. The territory detail page also includes a Child Territories related list; see Working with Territory Related Lists on page 307.

Editing Territories

To update an existing territory, click **Edit**, and then change the fields you want to modify. For more information, see Territory Fields on page 309 and Create Custom Territory Fields on page 310.

If an edit to a territory affects a large amount of data, you receive a confirmation email when the operation has completed.

> **Note:** When you edit groups, roles, and territories, sharing rules are recalculated to add or remove access as needed.

Cloning Territories

Click **Clone** to create a territory with the same standard and custom field values as the current territory. The cloned territory has the same parent territory as the original territory. However, assigned users, account assignment rules, and manually assigned accounts are not cloned.

> **Note:** If you have read-only access to a field, the value of that field is not carried over to the cloned record.

Viewing Accounts Assigned to a Territory

Click **View Accounts** to see a list of the accounts that have been assigned to this territory and territories below it in the territory hierarchy. The list includes both manually assigned accounts and accounts that were assigned via rules.

Working with Territory Related Lists

Each territory detail page has the following related lists:

- **Assigned Users** - Lists the users in the territory. See Manage Users in Territories on page 311.
- **Inherited Account Assignment Rules** - Lists the account assignment rules for this territory that are defined in a parent territory. See Managing Account Assignment Rules on page 315.

- **Account Assignment Rules Defined in This Territory** - Lists the account assignment rules for this territory. See Managing Account Assignment Rules on page 315.
- **Manually Assigned Accounts** - Lists the accounts that have been manually added to this territory. See Manually Assign Accounts to Territories on page 322.
- **Child Territories** - Lists the territories located immediately below this territory in the territory hierarchy. To create a child territory for this territory, click **Add Territory**. To view a child territory's detail page, click the territory name.

  📝 Note: Hover over the links at the top of a detail page to display the corresponding related list and its records. If Chatter is enabled, hover links display below the feed. An interactive overlay allows you to quickly view and manage the related list items. Click a hover link to jump to the content of the related list. If hover links are not enabled, contact your Salesforce administrator.

SEE ALSO:

Building Your Territory Hierarchy

Enable Territory Management

Add Forecast Managers to Territories

Create Territories

Create Territories

📝 Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

You can create up to 500 territories for your organization. To create a new territory:

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

2. Click **Add Territory**. You can also click **Add Territory** from the Child Territories related list of a territory detail page.

3. Define the new territory by entering or changing fields. For descriptions of territory fields, see Territory Fields on page 309.

   The required standard fields for territories are `Label`, `Territory Name`, and `Parent Territory`. Territories can also have custom fields. For more information, see Create Custom Territory Fields on page 310.

4. Click **Save** to finish or **Save & New** to create more territories.

SEE ALSO:

Territory Fields

Create Custom Territory Fields

Building Your Territory Hierarchy

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create territories:
- "Manage Territories"

  OR

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

Territory Fields

Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

A territory has the following fields, listed in alphabetical order.

Field Name	Description
Account Access	Sets how much access territory members have to the territory's accounts: view only, view and edit, or view, edit, transfer and delete.
Case Access	Sets how much access territory members have to cases on the territory's accounts, regardless of who owns the cases: no access, view only, or view and edit.
Confine Opportunity Assignment	Select this checkbox to prevent the opportunities in this territory from being moved out of this territory and its child territories when account assignment rules are run.
Contact Access	Sets the level of access territory members have to contacts on the territory's accounts, regardless of who owns the contacts. The options are no access, view only, or view and edit.
Forecast Manager	The user to whom forecasts from child and lower-level territories roll up. Only modifiable by clicking **Change** on the territory detail page. If enabled via the Territory Settings page, a forecast manager can administer lower territories in the hierarchy.
Label	The name used to refer to the territory in any user interface pages.
Opportunity Access	Sets how much access territory members have to opportunities on the territory's accounts, regardless of who owns the opportunities: no access, view only, or view and edit.
Parent Territory	Territory immediately above this territory in the territory hierarchy. The parent territory must be an existing territory. Use the lookup icon to select the parent territory.
Sharing Groups	Read-only and only displays on the territory detail page. For every territory, two sharing groups are created; one for the territory, and another for the territory and its children. Click **Territory** to see the users who are in the sharing

Field Name	Description
	group for a territory. Click **Territory and Subordinates** to see the users who are in the sharing group for a territory and its children. 📝 Note: Users are listed as group members only when the group is used in sharing rules or manual record sharing.
`Territory Name`	The unique name used by the API and managed packages.
`Territory Description`	A description of the territory.

SEE ALSO:

> Create Custom Territory Fields
>
> Display and Edit Territories
>
> Create Territories

Create Custom Territory Fields

You can add up to 500 custom territory fields to tailor territories for your company's unique requirements.

📝 Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

From the object management settings for territories, go to the fields area. From this area, you can view details of standard fields, create or edit custom fields, or define field dependencies.

📝 Note: Territories don't have customizable page layouts. New custom fields are added in alphabetical order at the bottom of the territory detail page.

SEE ALSO:

> Display and Edit Territories
>
> Create Territories
>
> Territory Fields

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create or edit custom territory fields:
- "Manage Territories"

  OR

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

Delete Territories

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

You can only delete territories that do not have any child territories. When a territory is deleted, the following items are no longer associated with that territory:

- All users, whether or not `Active in Territory` is checked
- All accounts, whether assigned manually or by account assignment rules
- All opportunities

To delete a territory:

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

2. Click **Del** next to a territory in the hierarchy. Alternatively, select the name of a territory and click **Delete**.

> **Note:** Restoring an account or opportunity from the Recycle Bin restores the territory assignment, but it does not trigger the evaluation of account assignment rules. If account assignment rules changed while the record was in the Recycle Bin, the restored record may have territories that are inconsistent with the new rules.

SEE ALSO:

Display and Edit Territories

Building Your Territory Hierarchy

Manage Users in Territories

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

A territory can have an unlimited number of users, and a user can be assigned to an unlimited number of territories.

In the context of a specific territory, users have both an `Active` status and an `Active in Territory` status:

Active

An active user is able to log in to Salesforce.

Deactivated users, such as employees who are no longer with your company, are disabled from logging in to Salesforce. Deactivated users continue to own opportunities and appear in forecasts and territories. When users are deactivated, their opportunity forecast overrides, adjusted total overrides, and manager's choice overrides on subordinates' forecasts are frozen. However, the manager of a deactivated user can apply manager's choice overrides to that user's forecasts. Rollup amounts are kept current. If a deactivated user is later reactivated, the user can resume normal work as before. If "Allow Forecasting" is disabled for a user who is deactivated, the user is removed from any territories he or she is assigned to.

Users can set their active status by modifying their personal information page in their personal settings.

Active in Territory

Users with `Active in Territory` checked on the territory detail page have open opportunities, closed opportunities, or no opportunities at all in that territory. Users with `Active in Territory` deselected have been transferred out of or removed from the territory, but retain ownership of opportunities in the old territory.

To view the territories to which you belong, view the Territories related list on your personal information page. To view this related list for any user, from Setup, enter *Users* in the `Quick Find` box, then select **Users**.

Adding Users to Territories

To add users to a territory:

1. From a territory detail page, click **Add Users**.

2. To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views.

3. Select and deselect checkboxes in the Action column to move users between the Available and Selected areas. Also, you can:

   - Click a letter to view users who correspond to that letter.

   - Click **All** to display all users who match the criteria of the current view.

   - Click **select shown** to move all users that are shown on the current list page to the Selected area below.

   - Click **deselect shown** or **deselect all** to move users from the Selected area to the Available area.

   📝 Note: Users already assigned to the territory will not appear in the Available users list even if they meet the list view criteria.

4. When the Selected area includes all users that you want to assign to the territory, click **Assign**.

Removing Users from Territories

You can remove a user from a territory and choose who will receive his or her open opportunities:

1. In the Assigned Users related list on the territory detail page, click **Remove** next to the user's name.

2. Click the `New Owner` lookup icon (🔍) to select a recipient for any open opportunities the user may have.

3. Alternatively, leave the `New Owner` field blank. One of the following results will occur:

   - If the parent territory has a forecast manager, then that forecast manager takes ownership of the user's open opportunities. Also, the forecast manager is assigned to the territory with `Active in Territory` unchecked.

   - If the parent territory does not have a forecast manager, then the user remains in the territory with `Active in Territory` unchecked.

4. Click **Save**.

   If very large amounts of data are affected, you will be sent a confirmation email when the operation has completed.

Transferring Users Between Territories

The user transfer wizard allows you to move a user from one territory to another, choose which open opportunities the user will continue to own, and designate a recipient for open opportunities the user leaves behind.

To transfer a user to another territory:

1. In the Assigned Users related list on the territory detail page, click **Transfer** next to the user's name.

2. Click **Select** next to the territory to which you are transferring the user. If necessary, expand or collapse nodes in the territory hierarchy to display the desired destination territory.

3. Click the `New Owner` lookup icon (🔍) to select the user who will take ownership of the open opportunities that the transferred user does not keep. Click **Next** to proceed.

If you skip this step and choose not to select a recipient, the forecast manager of the parent territory of the user's former territory automatically receives the open opportunities that the user does not keep. If there is no forecast manager in the parent territory of the user's former territory, then the user being moved retains ownership of his or her opportunities.

4. Choose a list view of the user's open opportunities.

5. Click **Select** and **Deselect** to move opportunities between the Available and Selected areas. Also, you can:

- Click a letter to view opportunities that correspond to that letter.
- Click **All** to display all opportunities that match the criteria of the current view.
- Click **select shown** to move all opportunities that are shown on the current list page to the Selected area below.
- Click **deselect shown** or **deselect all** to move opportunities from the Selected area to the Available area.

6. When the Selected area shows the opportunities that you want the user to retain after the transfer, click **Transfer**.

If very large amounts of data are affected, you will be sent a confirmation email when the operation has completed.

📝 Note: If you transfer the forecast manager out of a territory, that territory will no longer have a forecast and any opportunity overrides for that territory that were created by forecast managers above it in the territory hierarchy will be deleted. See Overriding Customizable Forecasts.

SEE ALSO:

Display and Edit Territories

Add Forecast Managers to Territories

View Assigned Users Lists

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

The assigned users list page displays a list of users assigned to the selected territory. From this page, you can view detailed user information, remove users from territories, transfer users between territories, and access other related information.

- To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views. The default `View` is your last selected user view.
- Click a username to view the user detail.
- Click **Remove** next to a username to remove the user from the territory.
- Click **Transfer** next to a username to transfer the user between territories.

SEE ALSO:

Managing Account Assignment Rules

Add Forecast Managers to Territories

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Consider the following before assigning the forecast manager for a territory:

- A territory can have only one forecast manager. See Assigning Forecast Managers in Your Forecast Hierarchy on page 268.
- Forecasts from child and lower-level territories roll up to forecast managers.
- If a territory has no forecast manager, there is no forecast for that territory.
- Forecast managers can receive opportunities when users are transferred out of or removed from a territory.
- Forecast managers can receive opportunities when account assignment rules are run.
- On the territory settings page, you can enable forecast managers to act as delegated administrators for territories below them in the hierarchy.

To assign or change the forecast manager for a territory:

1. On the territory detail page, click **Change** next to the `Forecast Manager` field.
2. Select a name from the drop-down list to specify the territory's forecast manager.

   On the right, a tree view of the territory hierarchy allows you to see the child and lower-level territories whose forecasts will roll up to the forecast manager.

3. Click **Save** to finish.

SEE ALSO:

    Assigning Forecast Managers in Your Forecast Hierarchy

    Display and Edit Territories

    Configure Territory Management Settings

Managing Account Assignment Rules

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

You can create account assignment rules that automatically move accounts and their associated opportunities and cases into territories based on any standard or custom account field, such as zip code, state, industry, revenue, or number of employees. Each rule consists of multiple rows of criteria that specify exactly how the accounts are assigned.

Account assignment rules are governed by the following:

- A territory can have inherited account assignment rules, meaning that the rules were created somewhere higher in the territory hierarchy and consequently also impact the given territory.
- A territory can have locally defined account assignment rules, meaning that the rule was created at the given territory.
- If a territory doesn't have any inherited or locally-defined account assignment rules, then it only contains accounts that were manually added.
- If an account matches all inherited and locally-defined account assignment rules for multiple territories on the same branch of the hierarchy, then the account is assigned to the lowest matching territory.
- If an account matches a territory's inherited account assignment rules but not all of the territory's locally-defined rules, then the account isn't assigned to the territory, but is evaluated for child territories.

For example, you have three territories:

- Territory A has four rules marked "Apply to child territories", and is a parent of territory B.
  - Territory B has three rules not marked "Apply to child territories", and is a parent of territory C.
    - Territory C has two rules.

If you assign an account that matches all of territory A's and territory C's rules but only one of territory B's rules, then the account is assigned to territory C. However, if territory B's rules are marked "Apply to child territories," then the account is assigned only to territory A.

Working with Account Assignment Rules

Click **Run Rules** on the territory detail page to evaluate the active inherited, locally defined rules shown on the page against all existing accounts in your organization. The rules for all subordinate territories are also evaluated—that is, when you run rules on the top-level territory, all rules in the entire hierarchy are evaluated. When you click **Run Rules**, an icon ( ) displays next to the button for all affected territories to indicate that rules are being processed. An email confirmation is sent when processing is complete.

> **Note:** To protect data quality, you can't modify a territory while the processing icon displays.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To manage account assignment rules:
- "Manage Territories"

  OR

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

Click **Manage Rules** on the territory detail page to access the Manage Account Assignment Rules page, where you can create, edit, preview, and run account assignment rules:

- Click **New** to create a new rule, or **Edit** to edit an existing rule. See Create and Edit Account Assignment Rules on page 320.
- Use the `Active` checkbox to set a locally-defined rule as active or inactive.

  Active account assignment rules automatically evaluate accounts and assign them to territories when:

  - An account is created using the Salesforce user interface, the Force.com API version 20.0 or earlier, or a client such as Connect Offline.
  - An account is imported using an import wizard.
  - An account is created by the conversion of a lead.
  - An account is edited and saved if the `Select by default` checkbox is selected for the "`Evaluate this account against territory rules on save`" checkbox option under **Layout Properties**. If the account assignment rule initiates an opportunity ownership change, you must have transfer access on the opportunity.
  - An account is edited and saved via the Force.com API.
  - **Run Rules** is clicked on a territory detail page, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
  - **Save & Run Rules** is clicked on the manage account assignment rules page for a territory, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
  - Duplicate accounts are merged.

- Click a rule name to see the details of that rule, including its active status and criteria. From a rule detail page you can edit, delete, or clone a rule.
- Click **Preview** to see the accounts that would be assigned to this territory and its child territories if the rules currently marked active were run. See Preview Account Assignments on page 321.
- Click **Save** to save the current active status of locally-defined rules.
- Click **Save & Run Rules** to save the current active status of locally-defined rules and evaluate the inherited and locally-defined rules shown on the page against all existing accounts in your organization. Running account assignment rules affects accounts in the Recycle Bin.

Click **Edit** on the territory detail page to toggle the `Confine Opportunity Assignment` checkbox. When it is selected, the territory's opportunities remain in the territory or its child territories when you run account assignment rules. The following exceptions apply:

- If an opportunity's account moves to only one of the territory's children, then the opportunity follows the account and is reassigned to the account's new territory. This includes when an account moves to multiple territories and only one of the new territories is a child of the original territory.
- If an opportunity's account moves to more than one of the territory's children, then the opportunity's territory field is set to blank.
- If an opportunity's account moves completely out of the territory and its children, then the opportunity's territory field is set to blank.

  💡 Tip: You can also manage account assignment rules using the Data Loader or the Web services API.

Account Assignment Rules and Opportunities

Several factors determine how account assignment rules assign opportunities to territories, including:

- Whether the account associated with the opportunity is assigned to one or more territories
- Whether the opportunity owner is a member of the same territory as the account
- The number of users assigned to the territory

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- Whether a forecast manager is assigned to the territory

📝 **Note:** If you're updating an account which triggers an account assignment rule that is part of territory management, you must have transfer access on the opportunity if the account assignment rule initiates a change in the opportunity ownership.

Accounts with One Territory

If the account associated with the opportunity is assigned to only one territory, use the following table to determine how the opportunity's territory is assigned:

Opportunity Owner Belongs to Same Territory as Account	Number of Users Assigned to Territory	A Forecast Manager is Assigned to the Territory	Results
Yes	1	N/A	The opportunity is assigned to the same territory as the account. The opportunity owner is unchanged.
No	1	N/A	The opportunity is assigned to the same territory as the account and the opportunity owner is the sole member of the territory.
No	0	N/A	The opportunity is assigned to the same territory as the account and the opportunity owner is added as an inactive member of the territory. The owner of the opportunity remains unchanged.
Yes	>1	Yes	The opportunity is assigned to the same territory as the account and the forecast manager becomes the opportunity owner.
Yes	>1	No	The opportunity is assigned to the same territory as the account. The owner of the opportunity remains unchanged if the opportunity owner has `Active in Territory` selected on the territory detail page.
No	>1	Yes	The opportunity is assigned to the forecast manager of the territory.
No	>1	No	The opportunity is assigned to the same territory as the account and the opportunity owner is added as an inactive member of the territory. The owner of the opportunity remains unchanged.

Accounts with Multiple Territories

If the account associated with the opportunity is assigned to more than one territory, use the following table to determine how the opportunity's territory is assigned:

Opportunity Owner's Territory Membership	Results
Opportunity owner has one territory in common with the account	The opportunity is not assigned to any territories. The opportunity owner can assign the opportunity to the

Opportunity Owner's Territory Membership	Results
	territory that he or she has in common with the account.
Opportunity owner has more than one territory in common with the account	The opportunity is not assigned to any territories. The opportunity owner can assign the opportunity to any territory that he or she has in common with the account.
Opportunity owner has no territories in common with the account	The opportunity is not assigned to any territories. The opportunity owner cannot assign the opportunity to any territories.

Territory Assignments for Standard Users

If the user creating the opportunity is a standard user, Salesforce automatically assigns a territory to a new opportunity only if the user and account have exactly one territory in common. For example, James, who is a standard user assigned to the Westlake territory only, creates an opportunity on the Filmore, Inc. account. Filmore, Inc. belongs to the Westlake territory and one other territory. Because James and Filmore, Inc., have exactly one territory in common, the new opportunity is assigned to the Westlake territory. If James belonged to the account's other territory, the opportunity would not be assigned to a territory.

Use the following table to determine when a territory will be assigned to an opportunity created by a standard user.

Number of Territories Assigned to User	Number of Territories Assigned to Account	Opportunity Owner Belongs to Same Territory as Account	Results
1	1	Yes	The opportunity is assigned to the territory in common.
>1	1	Yes	The opportunity is assigned to the account's territory if the user belongs to that same territory.
1	>1	Yes	The opportunity is assigned to the user's territory if the account is associated with that same territory.
>1	>1	Yes	The opportunity is not assigned to any territories. The opportunity owner can assign the opportunity to any territory that he or she has in common with the account.
N/A	N/A	No	The opportunity is not assigned to any territories.

Territory Assignments for Administrators

A user who is an administrator or has "Manage Territories" permission can view all territories.

If the user is an administrator, a territory-delegated administrator, or a user with the "Manage Territories" permission, Salesforce automatically assigns a territory to a new opportunity only if the administrator, the account, and the account's parent accounts have exactly one territory in common. For example, Jennifer is an administrator who manages the Northlake and Westlake territories. She creates an opportunity on the Richmond Brothers account. Richmond Brothers is associated with the Northlake and Southlake territories. Richmond

Brothers has one parent account, Zyman Products, which is assigned to the Northlake and Eastlake territories. Because Jennifer, Richmond Brothers, and Zyman Products have only the Northlake territory in common, the new opportunity is assigned to the Northwest territory. If Richmond Brothers or Zyman Products also belonged to the Westlake territory, the opportunity would not be assigned to a territory.

Use the following table to determine when a territory will be assigned to an opportunity created by an administrator.

Number of Territories Administrator Manages	Number of Territories Assigned to Account	Number of Territories Assigned to Account's Parent Account(s)	Opportunity Owner Manages Same Territory as Account and Parent Account(s)	Results
1	1	1	Yes	The opportunity is assigned to the territory in common.
>1	1	1	Yes	The opportunity is assigned to the territory in common.
1	>1	1	Yes	The opportunity is assigned to the territory in common.
1	1	>1	Yes	The opportunity is assigned to the territory in common.
>1	>1	1	Yes	The opportunity is assigned to the parent account's territory if the administrator and the account have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account
1	>1	>1	Yes	The opportunity is assigned to the administrator's territory if the account and the account's parent account(s) have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account
>1	1	>1	Yes	The opportunity is assigned to the account's territory if the administrator and the account's parent account(s) have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account
>1	>1	>1	Yes	The opportunity is assigned to the administrator's territory if the administrator, the account, and the account's parent account(s) have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account.

Number of Territories Administrator Manages	Number of Territories Assigned to Account	Number of Territories Assigned to Account's Parent Account(s)	Opportunity Owner Manages Same Territory as Account and Parent Account(s)	Results
N/A	N/A	N/A	No	The opportunity is not assigned to any territories.

SEE ALSO:

Create and Edit Account Assignment Rules

Preview Account Assignments

Display and Edit Territories

Create and Edit Account Assignment Rules

> **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

A territory can have a maximum of 15 account assignment rules, including both active and inactive rules. To create or edit an account assignment rule:

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

2. Select the territory you want to modify.

3. Click **Manage Rules** in the Account Assignment Rules related list.

4. Click **New** to create a new account assignment rule. To edit an existing account assignment rule, click **Edit**.

5. Enter a name for the rule. Rule names must be unique and can have a maximum of 80 characters.

6. Define filter criteria that accounts must match to be included in the territory.

   If your organization uses multiple languages, use your organization's default language when specifying your criteria. When you use picklists to specify filter criteria, the selected values are stored in the organization's default language. If you edit or clone existing filter criteria, first set the `Default Language` on the Company Information page to the same language that was used to set the original filter criteria. Otherwise, the filter criteria may not be evaluated as expected.

7. Optionally, check the `Apply to child territories` box that makes the rule applicable to child territories

8. Optionally, check the `Active` box to activate the rule. Inactive rules never run.

   Active account assignment rules automatically evaluate accounts and assign them to territories when:

   - An account is created using the Salesforce user interface, the Force.com API version 20.0 or earlier, or a client such as Connect Offline.

   - An account is imported using an import wizard.

   - An account is created by the conversion of a lead.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create or edit account assignment rules:

- "Manage Territories"

  OR

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

- An account is edited and saved if the `Select by default` checkbox is selected for the "`Evaluate this account against territory rules on save`" checkbox option under **Layout Properties**. If the account assignment rule initiates an opportunity ownership change, you must have transfer access on the opportunity.

- An account is edited and saved via the Force.com API.

- **Run Rules** is clicked on a territory detail page, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.

- **Save & Run Rules** is clicked on the manage account assignment rules page for a territory, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.

- Duplicate accounts are merged.

9. Click **Save** to finish, or **Save & New** to save the rule and begin defining another rule.

💡 Tip: By creating at least one account assignment rule at the top of your territory hierarchy that applies to child territories, you can build a hierarchy where all accounts match the top-level criteria and subordinate territories differentiate accounts by more specific criteria.

Similarly, if your organization uses divisions, create a rule at the top of your territory hierarchy that filters accounts by division and applies to child territories.

SEE ALSO:

Managing Account Assignment Rules

Preview Account Assignments

Display and Edit Territories

Preview Account Assignments

📝 Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Before running account assignment rules, preview a list of the accounts that would be assigned to the territory and territories below it in the territory hierarchy if the rules currently marked active were run:

1. From the territory detail page, click **Manage Rules** > **Preview**.

2. Click **Save** to save the active status of the rules. Click **Save & Run Rules** to save the active status of the rules and evaluate the rules against all existing accounts in your organization.

📝 Note: Running account assignment rules affects accounts in the Recycle Bin.

SEE ALSO:

Managing Account Assignment Rules

Create and Edit Account Assignment Rules

Display and Edit Territories

View Inherited Rules Lists

✏️ **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

The inherited rules list page displays a list of account assignment rules inherited by the selected territory. From this page, you can view detailed rule information and access information on individual rules.

- To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views.
- Click a rule name to view the rule detail.

SEE ALSO:

Manually Assign Accounts to Territories

Manually Assign Accounts to Territories

✏️ **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

As an alternative to creating and running account assignment rules, you can add accounts to territories manually:

1. On the territory detail page, click **Add Accounts** on the Manually Assigned Accounts related list.
2. Choose a view from the drop-down list, or click **Create New View** to build a new custom view.
3. Click **Select** and **Deselect** to move accounts between the Available and Selected areas. Also, you can:
    - Click a letter to view accounts that correspond to that letter.
    - Click **All** to display all accounts that match the criteria of the current view.
    - Click **select shown** to move all accounts that are shown on the current list page to the Selected area below.
    - Click **deselect shown** or **deselect all** to move accounts from the Selected area to the Available area.
4. When the accounts in the Selected area includes all accounts that you want to manually add to the territory, click **Assign**.

✏️ **Note:** Manually adding accounts and running account assignment rules are completely independent. A manually added account remains in a territory until it is manually removed. There is nothing to prevent assignment rules also adding the account to the territory.

SEE ALSO:

Display and Edit Territories

Enable Business Networks for Collaboration Across Organizations

Enable Salesforce to Salesforce

⚠ **Warning:** Enabling Salesforce to Salesforce is not reversible, however, you control the information you share and the connections you share with. You can stop sharing or modify sharing settings at any time. By enabling Salesforce to Salesforce, you agree to allow salesforce.com to process updates to information in your organization that is shared with other organizations. Salesforce to Salesforce allows you to share your data with third-party recipients, and those recipients may in turn use Salesforce to Salesforce to share your data with further third-party recipients unknown to you. You are responsible for ensuring that appropriate contractual or other legal arrangements are in place between you and your recipients to limit those recipients' use and disclosure of your shared data.

To enable Salesforce to Salesforce:

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

2. Click **Edit**.

3. Select `Enable`.

4. Click **Save**.

When you enable Salesforce to Salesforce, a new user named "Connection User" is created. This user does not count towards the number of used licenses for your organization, and is not included in any user management view.

When your business partner updates a shared record, the `Last Modified By` field on the record in your organization displays `Connection User`, allowing you to easily track all changes made by your business partners.

The Connection User is automatically assigned to the Partner Network profile. The Partner Network profile cannot be modified and is not included in any profile management view.

After Salesforce to Salesforce is enabled:

1. Create a permission set with the "Manage Connections" permission enabled and the Connection tab set to `Visible`, and assign the permission set to users who will be working with Salesforce to Salesforce connections.

   We also recommend giving the "Manage Queues" user permission to all users with the "Manage Connections" user permission. This lets users create and manage queues for connections without needing assistance from an administrator.

2. Configure Salesforce to Salesforce settings, such as communication templates for sending invitations to your business partners.

3. Add the External Sharing related list to page layouts for the appropriate profiles.

   📝 **Note:** This related list can be made available to all users, not just users with the "Manage Connections" permission.

4. Optionally, create custom list views on the External Sharing related list and give access to the appropriate users, so that they can view and accept shared records.

5. Optionally add the Received Connection Name and Sent Connection Name columns to the related lists on the page layouts of the desired objects.

6. Create and manage connections with your business partners.

Configure Salesforce to Salesforce

You can configure Salesforce to Salesforce to use communication templates for interacting with your business partners. In addition, you can configure the email address and name used on the templates. To configure any of these settings:

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

2. Click **Edit** and modify the following settings:

Setting	Description
From Email Address	The email address from which all Salesforce to Salesforce communication templates are sent, for example, "partner@acme.com." Salesforce sends the emails automatically, but they appear to your contacts as if they were sent from this email address. If a contact responds to a communication template, the response is sent to this address.
From Email Name	The name that will be associated with the "From" Email Address, for example, "Acme Channel Manager".
Invitation Template	Used to send invitations.
Deactivation Template	Used to notify a business partner that you have deactivated the connection.
Accept Invitation Template	Used to notify a business partner that you have accepted an invitation.
Reject Invitation Template	Used to notify a business partner that you have not accepted an invitation.
Update Connection Profile Template	Used to notify business partners of changes to an active connection profile.

3. Click **Save**.

Setting Up Salesforce-Integrated Email

Email Editions and Permissions

Salesforce email and templates are available in several editions. Enable the feature and manage permissions and access at the organization level and for administrators and end users.

Organization Level	Permissions and Access Requirements
Use Email in Lightning Experience:	• Lightning Experience enabled. • Send Email action added to Lightning Actions on page layouts for objects that support Lightning Email.
Send all types of outbound email:	`Access to Send Email` access level set to *All email.*
Send attachments:	• Content Deliveries enabled to upload files larger than 3 MB. If Content Delivery is not enabled, users cannot upload files larger than 3 MB. • Salesforce Files enabled to send files. If Salesforce Files is not enabled, you can only send attachments.
View sent emails:	• When Enhanced Email is on: No additional permissions are required. Emails appear as email records. • When Enhanced Email is off: Emails appear as task records. We recommend enabling Shared Activities. If Shared Activities is not enabled and a user sends email to multiple contacts, Salesforce creates duplicate closed task records—one for each contacts.

Administrator	Permissions and Access Requirements
Create an email template:	"Send Email" permission.
Attach a file to a template or email:	Access to the file you're attaching.
Delete a template created by someone else:	"View All Data" permission.
Send email:	Before sending email for the first time, all administrators must verify their email addresses. Just follow the prompt.

User	Preferences and Permissions Required
Create an email template:	"Send Email" permission.
Add merge fields to a template or email:	Access to the fields on the applicable object.
Attach a file to a template or email:	Access to the file you're attaching.
Delete a template you created:	None.
Send email:	"Send Email" permission. - Before sending email for the first time, all administrators and users must verify their email addresses. Just follow the prompt.

SEE ALSO:

Which Option for Sending Email from Salesforce Is Best for Your Organization?

Configure the Email Action in the Activity Composer in Lightning Experience

Enhanced Email: Improve Email in Salesforce with Key Customizations and a Better Email Page

Enhanced Email gives you and your users a ton of email functionality to better drive your business processes, including the ability to relate emails to other records, add custom fields to emails, use triggers with emails, modify the email layout, and manage emails using the Salesforce API. You also get a new and improved email detail page that shows emails in their original format.

With Enhanced Email, emails in Salesforce are saved as EmailMessage records. EmailMessage is a standard Salesforce object, and that's how you get all of these great new email features.

> **Note:** With Enhanced Email, for backwards compatibility, we still create a Task record for each email message. However, when you view emails in Salesforce, you see the Email Message record for the email. That's a good thing, because now emails display in their original format. So, HTML emails show the HTML format, and plain text emails show plain text format. That's what your users expect.

EDITIONS

Available in: Salesforce
Classic and Lightning
Experience

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

Considerations for Setting Up Enhanced Email

Consider a few tidbits of wisdom before using Enhanced Email, including limitations, details for Email-to-Case customers, and information about working with EmailMessage and Task records.

- Enhanced Email is automatically enabled for most organizations except ones that use Email-to-Case.
- If you use Email-to-Case, you can already use custom fields, customized layouts, workflow rules, and triggers with emails without enabling Enhanced Email. Plus, you already use the EmailMessage object to store emails associated with cases. If you want to be able to relate EmailMessage records to other objects (besides cases), then we recommend that you enable Enhanced Email.
- With Enhanced Email, your emails are stored using the standard Salesforce object, EmailMessage. This gets you all the usual goodies that come with standard objects, including custom fields,

EDITIONS

Available in: Salesforce
Classic and Lightning
Experience

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

customized layouts, and a better record detail page. If your organization uses Email-to-Case, the EmailMessage object is already used to store emails associated with cases. If your organization does not use Email-to-Case, and you want to store emails with the EmailMessage object, you must enable Enhanced Email.

- With Enhanced Email, emails sent from Salesforce are saved as both EmailMessage records and Task records. However, only the EmailMessage record is shown on the email detail page in the UI.

- Even if your organization uses Enhanced Email, emails added from Web-to-Lead and Salesforce for Outlook are still only stored as Task records.

- You can't use custom currency fields with the EmailMessage object.

- EmailMessage records can have only one record type.

- Workflow rules can use EmailMessage records only to update fields on Case records.

- You can relate emails to contacts, leads, accounts, opportunities, cases, campaigns, person accounts, and other records. In Salesforce Classic, these related emails are displayed in the Activity History list. In Lightning Experience, they are displayed in the Activity Timeline.

- Email is logged as an EmailMessage record, not an Activity record, and how you modify the content has changed. Email fields, including RelatedToId, can only be changed when the email is in draft status. The IsExternallyVisible field and custom fields are the exception. This restriction is true for changes made in the UI and through the API.

- Before using Enhanced Email, we recommend that you:

  - Review triggers and workflow rules that use the EmailMessage object. For EmailMessage records associated with cases, the `ParentID` field is always populated. With Enhanced Email, you can associate EmailMessage records with other records and the `ParentID` field may be blank. As a result, you may need to update your triggers and workflow rules to handle email messages with a blank `ParentID` field.

  - Review custom business logic that incorporates tasks and emails. We recommend that you:

    - Recreate any custom Task object fields on the EmailMessage object.

    - Migrate any Task object triggers to the EmailMessage object.

  - Test it in a sandbox with any workflows and customizations, including Email-to-Case customizations.

SEE ALSO:

Enhanced Email: Improve Email in Salesforce with Key Customizations and a Better Email Page

Set Up Enhanced Email

Set Up Enhanced Email

Enhanced Email gives you and your reps a ton of great email functionality, including the ability to relate emails to other records, add custom fields to emails, use triggers with emails, modify the email message layout, and manage emails using the Salesforce API. Enhanced Email is automatically enabled for most organizations except those that use Email-to-Case.

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

2. Click **Enable**.

3. Update the Email Message page layout to:

    a. Add the `Related To` field.
    Then, your users can see which records are related to an email.

    b. Remove the `Parent Case` field from the Email Message page layout. This field is generally blank unless you use Email-to-Case and an email is associated with a case.

SEE ALSO:

Enhanced Email: Improve Email in Salesforce with Key Customizations and a Better Email Page

Considerations for Setting Up Enhanced Email

Let Your Users Send Email from Salesforce

Your users are in Salesforce all day long to review customer information, log activity, and create reports. So, why not make it easy on them and let them send email right from Salesforce? There are several options, depending on whether your organization uses Lightning Experience, whether your company owns an email domain, and which email application your company uses.

IN THIS SECTION:

Which Option for Sending Email from Salesforce Is Best for Your Organization?

There are several options that let your users send email right from Salesforce These options depend on whether your organization uses Lightning Experience, whether your company owns an email domain, and which email application your company uses.

Monitor Emails Sent from Salesforce

Get the most out of sending email from Salesforce with features that let you monitor emails, including email logs and the mass email queue.

Improve Deliverability of Emails Sent from Salesforce

Email deliverability is the likelihood of a company's or individual's email reaching its intended recipient. To improve the deliverability of email you send through Salesforce, we offer severalsettings and compliance options.

Organization-Wide Addresses: Let Users Send Email from Salesforce Using a Common From Address

If your Salesforce org requires users to share a common email alias, you can define a list of organization-wide addresses for each user profile. When sending email from Salesforce, users with these profiles can select their own address or the organization-wide address for the email's `From` address. Replies are delivered to selected address.

Organization-Wide Footers: Let Users Send Email from Salesforce with Common Footers

Let your users save time and apply common messaging to all emails sent from Salesforce by creating organization-wide footers. You can create a separate email footer for each encoding and choose default footers for single and mass email. In Lightning Experience, mail sent via Gmail or Office 365 can contain an organization-wide footer: you choose if it is included.

Which Option for Sending Email from Salesforce Is Best for Your Organization?

There are several options that let your users send email right from Salesforce These options depend on whether your organization uses Lightning Experience, whether your company owns an email domain, and which email application your company uses.

Use this flowchart to figure out which option for sending email from Salesforce is right for your org. It all starts with whether you use Lightning Experience or not.
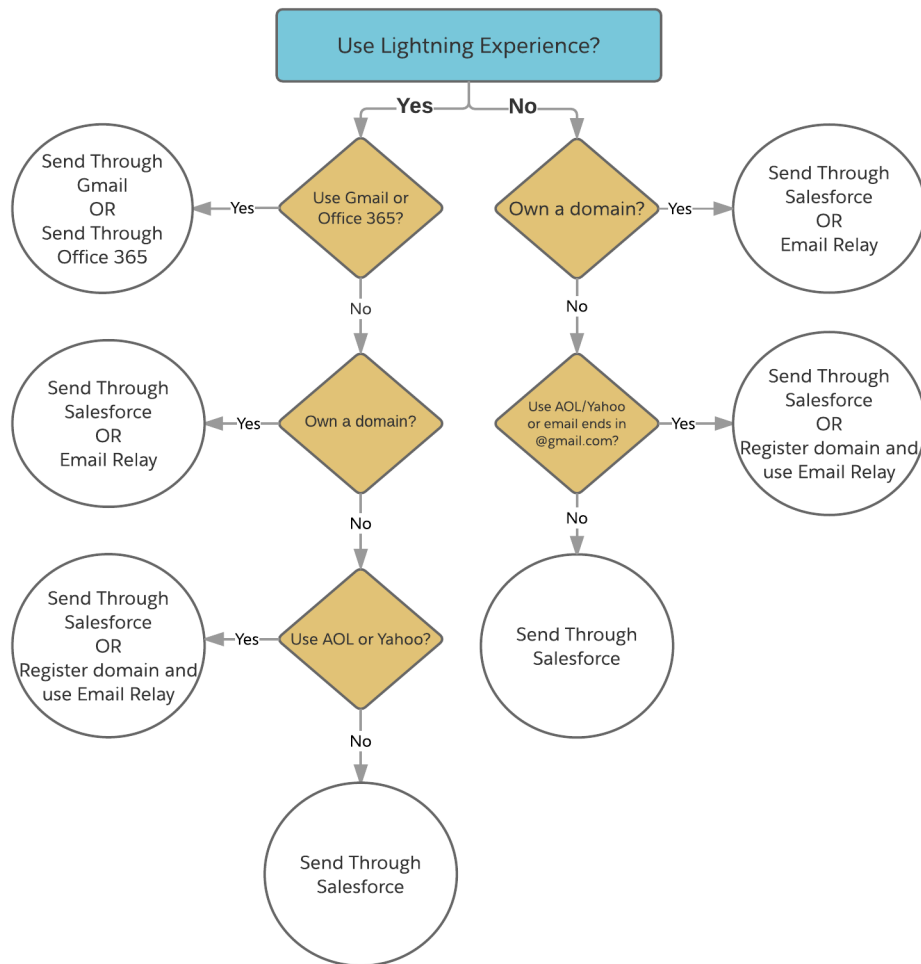
*If your email addresses end in @aol.com, @yahoo.com, and @gmail.com and you want to use Email Relay, you need to register for your own domain. This is due to the Domain-based Message Authentication, Reporting & Conformance (DMARC) policy at Gmail, AOL™, and Yahoo™. Learn More

IN THIS SECTION:

Send Through Gmail or Office 365: Let Users Send Email through External Services

To streamline their email correspondence, let your users send email from Salesforce using their Gmail or Office 365 accounts. Then, to recipients, emails look like they were sent from your users' Gmail or Office 365 accounts. Your users can also see the emails they've sent in their Gmail or Office 365 Sent Items folder.

Send Through Salesforce: Let Users Send Email through Salesforce

To streamline their email correspondence, let your users send email from Salesforce using the Salesforce servers. No need to integrate with an external email service. This a great approach if you're using Salesforce Classic, need bounce management, or aren't using Gmail™ or Office 365™ with Lightning Experience.

Email Relay: Let Users Send Email through Your Company's Email Server

To streamline their email correspondence, let your users send email from Salesforce through your company's email server. Then, to recipients, emails look like they were sent from your users' company email accounts. These emails are also stored on your company's email server, which helps with compliance, and your users can see the emails they've sent from Salesforce in their company email Sent Items folder.

Send Through Gmail or Office 365: Let Users Send Email through External Services

To streamline their email correspondence, let your users send email from Salesforce using their Gmail or Office 365 accounts. Then, to recipients, emails look like they were sent from your users' Gmail or Office 365 accounts. Your users can also see the emails they've sent in their Gmail or Office 365 Sent Items folder.

Available in: Lightning Experience and Salesforce Classic

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

IN THIS SECTION:

[Considerations for Setting Up Send Email through Gmail™ or Office 365™](#)

Review a few details before setting up Send through Gmail or Office 365, including details about triggers and workflow rules and information for organizations that use Communities.

[Set Up Send Email Through Gmail™ or Office 365™](#)

With a few quick steps, you can let your users send email in Salesforce using their Gmail or Office 365 accounts.

Considerations for Setting Up Send Email through Gmail™ or Office 365™

Review a few details before setting up Send through Gmail or Office 365, including details about triggers and workflow rules and information for organizations that use Communities.

- Send through Gmail or Office 365 is not available in Communities. If your organization has Send Through Gmail or Office 365 enabled, it will not work in Communities. Instead, emails sent in Communities will go through Salesforce or Email Relaying, depending on which option your organization has configured.
- If you use Send through Gmail, you can visit your My Email Settings page in Salesforce to customize the name that shows up in the From field of your outgoing emails. If you use Send Through Office 365, you can't change the name in Salesforce.

When using Send through Gmail or Office 365:

- Emails are not stored in Salesforce email logs, which are only used for emails sent through Salesforce. This means email delivery information is not available in Salesforce. Obtain email logs from Gmail or Office 365.
- Emails sent by triggers and workflow rules are still sent through Salesforce.
- Bounce management isn't supported, so contacts and leads aren't automatically updated with bounce information. However, you can view bounced emails in your email inbox. If you require bounce management, use Send through Salesforce instead.
- Transport Layer Security (TLS) is handled through the external email service and not through Salesforce settings.
- Organization-wide footers do not appear in emails sent from Salesforce.

SEE ALSO:

[Send Through Gmail or Office 365: Let Users Send Email through External Services](#)
[Set Up Send Email Through Gmail™ or Office 365™](#)

Set Up Send Email Through Gmail™ or Office 365™

With a few quick steps, you can let your users send email in Salesforce using their Gmail or Office 365 accounts.

1. From Setup, enter `Send through External Email Services` in the `Quick Find` box, then select **Send through External Email Services**.

2. Enable Send through Gmail or Send through Office 365. You can't select both options.

   Your users can manage their external email configuration from **My Email Settings** in their personal settings.

The feature is enabled for all users with the standard user profile or with the "Send Email through External Email Services" user permission. Users can send through external email services in the Lightning Experience Email Composer using the OAuth industry standard. User credentials aren't stored within Salesforce.

SEE ALSO:

    Send Through Gmail or Office 365: Let Users Send Email through External Services

    Considerations for Setting Up Send Email through Gmail™ or Office 365™

Send Through Salesforce: Let Users Send Email through Salesforce

To streamline their email correspondence, let your users send email from Salesforce using the Salesforce servers. No need to integrate with an external email service. This a great approach if you're using Salesforce Classic, need bounce management, or aren't using Gmail™ or Office 365™ with Lightning Experience.

IN THIS SECTION:

Considerations for Setting Up Send through Salesforce

Review a few details before setting up Send through Salesforce, including details about bounce management and spam.

Set Up Send Email Through Salesforce

Review a few details before setting up Send through Salesforce, including details about bounce management and spam.

Test the Deliverability of Emails Sent Through Salesforce

When a user sends an email through Salesforce, the email is routed through one of a number of possible Salesforce IP addresses. If the email's recipient blocks any of these IP addresses, the email might not be receieved. It's hard to test whether your customers are receiving emails from all possible Salesforce IP addresses. However, using the Test Deliverability feature, you can easily send an emails to yourself from each of the potential Salesforce IP addresses. If you receive all emails, then you aren't blocking any of the Salesforce IP addresses.

Considerations for Setting Up Send through Salesforce

Review a few details before setting up Send through Salesforce, including details about bounce management and spam.

- Send through Salesforce is a good option if:
  - You need bounce management.
  - You don't want to integrate Salesforce with an external email service.
  - You aren't using Gmail™ or Office 365™ with Lightning Experience.

- If email authentication is not configured properly following the recommendations below, emails are flagged as spam by certain email providers.

- If your company doesn't own the domain or has bounce management enabled, your sent emails may be identified as being sent through Salesforce and may appear like they're coming from you.

- If the Deliverability settings, `Enable compliance with standard email security mechanisms` or `Activate bounce management`, are enabled, Gmail recipients see extra information

- If `Enable Sender ID compliance` is enabled, Outlook and email clients supporting Sender ID don't see "Sent on behalf of [sender name]."

- If your company owns a domain, we recommend that you set up email authentication methods like Sender Policy Framework (SPF) or DomainKeys Identified Mail (DKIM) in your DNS. This ensures better delivery and acceptance by recipients.

Set Up Send Email Through Salesforce

Review a few details before setting up Send through Salesforce, including details about bounce management and spam.

For Companies that Own a Domain (mycompany.com)

1. Turn off "Enable compliance with standard email security mechanisms."

2. Turn off "Enable Sender ID compliance."

3. Add Salesforce's SPF record to client's domain DNS to indicate that Salesforce is an approved sender e.g SPF record: "v=spf1 mx include:_spf.salesforce.com ~all".

4. Set up DKIM for better deliverability.

For Companies that Don't Own a Domain

If your email address domain is not owned by your company and ends in @gmail.com, @aol.com or @yahoo.com, you need to register for a domain that you control, and use this new domain for all of your emails sent from Salesforce due to the Domain-based Message Authentication, Reporting & Conformance (DMARC) policy at Gmail, AOL™, and Yahoo™. Learn More Other:

1. Turn on "Enable compliance with standard email security mechanisms."

2. Turn off "Enable Sender ID compliance." We recommend enabling Sender ID compliance only if you have recipients using the Sender ID email authentication protocol, which isn't widely used.

Test the Deliverability of Emails Sent Through Salesforce

When a user sends an email through Salesforce, the email is routed through one of a number of possible Salesforce IP addresses. If the email's recipient blocks any of these IP addresses, the email might not be receieved. It's hard to test whether your customers are receiving emails from all possible Salesforce IP addresses. However, using the Test Deliverability feature, you can easily send an emails to yourself from each of the potential Salesforce IP addresses. If you receive all emails, then you aren't blocking any of the Salesforce IP addresses.

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

2. Enter your business email address.

3. Click **Send**. Salesforce sends a test message from all IP addresses to your business email address. Each test message specifies the IP address from which it was sent.

4. To make sure that you received all test messages, check your business email account.

If you didn't receive all the test messages, your organization's email administrator must whitelist the Salesforce IP ranges on your organization's email server. Whitelisting an IP address allows the email server to receive email from an IP address that is otherwise blocked. For a current list of Salesforce IP ranges, see What are the Salesforce IP Addresses to whitelist?.

Salesforce maintains separate IP addresses for inbound and outbound email. The IP addresses used for outbound email don't accept inbound email connections.

SEE ALSO:

Guidelines for Configuring Deliverability Settings for Emails Sent from Salesforce

Enabling Compliance BCC Emails

Email Relay: Let Users Send Email through Your Company's Email Server

To streamline their email correspondence, let your users send email from Salesforce through your company's email server. Then, to recipients, emails look like they were sent from your users' company email accounts. These emails are also stored on your company's email server, which helps with compliance, and your users can see the emails they've sent from Salesforce in their company email Sent Items folder.

IN THIS SECTION:

Considerations for Setting Up Email Relay

Review a few details before setting up Email Relay, including details about bounce management and spam.

Set Up Email Relay

Considerations for Setting Up Email Relay

Review a few details before setting up Email Relay, including details about bounce management and spam.

- Email Relay is a good option if:
  - You want to route email sent from Salesforce through your company's mail service. This is helpful for compliance.
  - Your company owns the domain (mycompany.com).

- Email Relay is configured for your Salesforce org only. Email Relay enables you to store copies of all email for auditing. You can also append content such as standard footers into all emails. Bounce management is also supported.

- For bounce management to work, your email server must allow the relaying of email sent from Salesforce.

- Salesforce send limits still apply to email relaying.

- Email Relay requires some technical expertise to set up.

Set Up Email Relay

Email Relay uses your company's email server to send email from Salesforce. Companies set up email relaying to:

- Route all email from Salesforce through their own email servers. This prevents the appearance of email spoofing by Salesforce. Email spoofing is the forging of email headers to make messages appear as if they came from someone other than the original sender.

- Store copies of all email as required by government regulations in various industries.

- Apply existing content filters that scan messages for data and content that is not approved to be sent out through company email.

- Run outbound email through antivirus software before sending it to customers.

- Append data such as company-wide disclaimers at the bottom of email messages.

You can set up Email Relay for Salesforce-generated email by configuring Salesforce to automatically route email through your company's Simple Mail Transfer Protocol (SMTP) server. Contact Salesforce to enable email relaying for your organization.

> **Warning:** If you plan to activate both bounce management and email relaying, check with your email administrator to ensure that your organization's email server allows the relaying of email sent from Salesforce; otherwise, the email you send from Salesforce may not get delivered. For more information on bounce management, see Guidelines for Configuring Deliverability Settings for Emails Sent from Salesforce on page 345.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To configure Email Relay:
- "Modify All Data"

To set up email relaying:

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

2. Configure the following settings:

Setting	Description
`Email Host`	The host name or IP address of your company's SMTP server. Obtain this information from your email administrator.
	Important: If you plan to use Transport Layer Security (TLS) with this connection, enter the host name instead of the IP address. TLS requires the host name for verifying certificates.
	For host names, use the following format:
	`<mail server>.<domain>.<domain extension>`

Setting	Description
	For example:
	`mail.acme.com`
Port	The port number of your company's SMTP server. Obtain this information from your email administrator. Email relaying is supported on port numbers 25, 587, 10025, and 11025.
TLS Setting	Specifies whether Salesforce uses TLS for SMTP sessions. Select one of the following options:
	• `Preferred` (default): If the remote server offers TLS, Salesforce upgrades the current SMTP session to use TLS. If TLS is unavailable, Salesforce continues the session without TLS.
	• `Required`: Salesforce continues the session only if the remote server offers TLS. If TLS is unavailable, Salesforce terminates the session without delivering the email.
	• `Preferred Verify`: If the remote server offers TLS, Salesforce upgrades the current SMTP session to use TLS. Before the session initiates, Salesforce verifies the certificate is signed by a valid certificate authority, and that the common name presented in the certificate matches the domain or mail exchange of the current connection. If TLS is available but the certificate is not signed or the common name does not match, Salesforce disconnects the session and does not deliver the email. If TLS is unavailable, Salesforce continues the session without TLS.
	• `Required Verify`: Salesforce continues the session only if the remote server offers TLS, the certificate is signed by a valid certificate authority, and the common name presented in the certificate matches the domain or mail exchange to which Salesforce is connected. If any of these criteria are not met, Salesforce terminates the session without delivering the email.
Restrict Relay to Domains	Specifies whether to restrict the email relaying functionality to certain domains. If you select this option, enter the names of those domains separated by commas in the text field below. (The asterisk (*) wildcard is allowed; for example, `*.subdomains.com` matches john@aco.subdomains.com and john@bco.subdomains.com (but not john@subdomains.com)). This causes Salesforce to route email to your company's SMTP server only if the email is addressed to one of the listed domains. If you select the checkbox but do not list any domains, Salesforce routes all email to your company's SMTP server.

Setting	Description
`Active`	Enables email relaying for your organization. If you deselect this checkbox, Salesforce keeps the email relay configuration but does not route email to your company's email server.

3. Save the page.

Salesforce recommends sending a test message each time you change the email relay configuration.

SEE ALSO:

Test the Deliverability of Emails Sent Through Salesforce

Enabling Compliance BCC Emails

Guidelines for Configuring Deliverability Settings for Emails Sent from Salesforce

Organization-Wide Addresses: Let Users Send Email from Salesforce Using a Common From Address

Monitor Emails Sent from Salesforce

Get the most out of sending email from Salesforce with features that let you monitor emails, including email logs and the mass email queue.

IN THIS SECTION:

Email Logs: Monitor Emails Sent Through Salesforce

With email logs, you can easily monitor emails sent through Salesforce in the last 30 days. Logs contain information on each email, including the sender and recipient, date and time, delivery status, and any associated error codes. Email logs are in CSV format.

Mass Email Queue: Monitor the Status of Mass Emails Sent Through Salesforce

The mass email queue lets you view the status of scheduled mass emails that you've personally sent or the status of scheduled mass emails for your Salesforce org. You can cancel mass emails if necessary. You can view the status of your personal mass emails from your personal settings. If you have permission, you can view the status of organization-wide mass emails from Setup.

SEE ALSO:

Let Your Users Send Email from Salesforce

EDITIONS

Available in: Salesforce Classic

Email Logs is available in: **All** Editions

Mass Email Queue is available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Email Logs: Monitor Emails Sent Through Salesforce

With email logs, you can easily monitor emails sent through Salesforce in the last 30 days. Logs contain information on each email, including the sender and recipient, date and time, delivery status, and any associated error codes. Email logs are in CSV format.

EDITIONS

Available in: Salesforce Classic

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

IN THIS SECTION:

Considerations for Using Email Logs

Before creating organization-wide footers for users in your Salesforce org, review a few details, including information about encoding and defaults.

Request an Email Log

With email logs, you can easily monitor emails sent through Salesforce in the last 30 days. It's a cinch to request a new log at any time.

Email Log Reference

SEE ALSO:

Monitor Emails Sent from Salesforce

Let Your Users Send Email from Salesforce

Considerations for Using Email Logs

Before creating organization-wide footers for users in your Salesforce org, review a few details, including information about encoding and defaults.

- Requests for email logs are queued in the order that they are received. Email logs should be available within 30 minutes of your request.

- The pending email log requests list provides the status on email log requests that have not yet completed.

- The email log errors list provides descriptions for requests that failed. You cannot resubmit a failed request if it requires data that has exceeded the 30 day limit, or if you already have three pending requests.

- Email logs are CSV files contained within a compressed file that contains a maximum of 100,000 records. Since email log requests return up to 500,000 records, there may be up to five .zip files to download. Logs contribute to your overall file storage limits.

- You can have a maximum of three pending log requests at one time. If you already have three pending requests, you cannot request another log until at least one of those requests completes.

- Email logs are available for messages sent within the past 30 days prior to your request.

- Each email log can span a maximum of seven days. To see email log data from a period of time greater than seven days, create multiple requests.

SEE ALSO:

Email Logs: Monitor Emails Sent Through Salesforce

Request an Email Log

With email logs, you can easily monitor emails sent through Salesforce in the last 30 days. It's a cinch to request a new log at any time.

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

2. Click **Request an Email Log**.

3. Optionally, you can filter an email log to only include rows where a specific domain name or email address appears in a field, such as `Recipient` or `Message ID Header`. To enter more than one filter term, separate each value with a comma. If you leave this field blank, the log is not filtered and all email addresses are returned within the specified time range.

4. Enter the email addresses that you want to receive notification when the email log request is complete. Separate each email address with a comma.

To clear a request and return to the email log overview page, click **Cancel**.

SEE ALSO:

Email Logs: Monitor Emails Sent Through Salesforce

Email Log Reference

Email Log Reference

The following table describes the format of the log file and lists examples of its fields:

Column	Field	Description	Example
A	Date/Time	The date and time the message was sent in GMT	3/06/2009 13:37
B	Internal Message ID	The unique internal ID of the message	16/A4–20983–88E21E84
C	Mail Event	Indicates the final email event in the mail server. Events can be one of the following values:	T
		R - Reception The email was successfully received.	
		D - Delivery The email was successfully sent.	
		T - Transient Failure The email transmission was	

Column	Field	Description	Example
		delayed. Salesforce will retry delivery over a 24-hour period. The first retry occurs five minutes after the first transient failure, the second occurs ten minutes after that, the third twenty minutes after that, and so on. **P - Permanent Failure** The email could not be delivered.	
D	`Recipient`	The email address of the person to whom the email is sent	admin@acme.com
E	`Sender`	The email address of the person who sent the email	user@acme.com
F	`Remote Host`	The IP address of the application server that delivered the email to the email server	10.0.0.1
G	`Bytes Transferred`	The size of the email	11856
H	`User ID`	The Salesforce ID of the user who sent the email	`00540000000rSXT`
I	`Message ID Header`	The ID header at the beginning of every email	`21749386. 106091224027705044. JavaMail. sfdc@na2-app4-2-sjl. ops.sfdc.net`
J	`Retry Count`	The number of attempts made to deliver the email	11
K	`Seconds in Queue`	The number of seconds the email had to wait before being delivered	300
L	`Delivery Stage`	The final stage the delivery was in before it was logged. Below are the values of the stages in the order that they appear during the SMTP sequence: **BANNER** The SMTP connection response	`during RCPT TO`

Column	Field	Description	Example
		EHLO The beginning of the session with the mail server	
		STARTTLS Establishes a secure communication session with the email server	
		MAIL FROM Announces the sender of the email	
		RCPT TO Announces the recipient of the email	
		DATA Announces that the subsequent text is the email message	
		BODY The state when the body of the email is being sent to the recipient	
		RSET Resets the server state, ending the session	
		In addition, there are responses that may appear at any point during the delivery sequence:	
		while not connected The client is trying to establish a connection	
		while idle The client has connected, but is not sending or receiving any commands	
		reading confirmation A command was sent and the client is waiting for a response	
		handshaking TLS An error occurred while trying to establish a secure connection	

Column	Field	Description	Example
		out of band bounce	
		The receiving server accepted a command, but then for an unknown reason rejected it	
		in unknown state	
		An unknown error has occurred	
M	Relay Address	The hostname of the designated relay system	relay.my.org
N	Relay Port	The port of the designated relay system	587

Column	Field	Description	Example

O	Delivery Status Notification	After every delivery stage, a three-digit response code is sent from the mail server. The first number indicates whether the command was successful or unsuccessful; the second digit indicates the type of error; and the third provides additional information to resolve the potential problem.
		
		The five possible values of the first digit are:
		
		1xx - Positive Preliminary reply
		   The command was accepted, but no response has been sent
		
		2xx - Positive Completion reply
		   The requested action has successfully completed
		
		3xx - Positive Intermediate reply
		   The command was accepted, but the requested action needs more information
		
		4xx - Transient Negative Completion reply
		   The command was not accepted and the requested action did not occur. However, the error condition is temporary and the action may be requested again.
		
		5xx - Permanent Negative Completion reply
		   The command was not accepted and the requested action did not occur
		
		Every email service provider implements the codes differently, so there is no comprehensive list for what the second or third digits indicate.
			421 no adequate servers

Column	Field	Description	Example
		For more information on these codes, view the official SMTP documentation, section 4.2.1: http:// www.ietf.org/rfc/rfc2821.txt ?number=2821	

SEE ALSO:

Email Logs: Monitor Emails Sent Through Salesforce

Mass Email Queue: Monitor the Status of Mass Emails Sent Through Salesforce

The mass email queue lets you view the status of scheduled mass emails that you've personally sent or the status of scheduled mass emails for your Salesforce org. You can cancel mass emails if necessary. You can view the status of your personal mass emails from your personal settings. If you have permission, you can view the status of organization-wide mass emails from Setup.

The mass email queue shows the number of recipients that the mass email was addressed to and sent to. These numbers may differ because:

- The mass email would cause your organization to exceed its daily mass email limit. Salesforce does not send the message to any of the intended recipients in this case.
- One or more selected recipients opted out of receiving mass email after the mass email was scheduled but before it was processed.
- One or more selected recipient email addresses were removed from the contact or lead after the mass email was scheduled but before it was processed.
- The user who sent the mass email was deactivated after the mass email was scheduled but before it was processed. Salesforce does not send mass emails scheduled by a user who is deactivated.

SEE ALSO:

Monitor Emails Sent from Salesforce

Improve Deliverability of Emails Sent from Salesforce

Email deliverability is the likelihood of a company's or individual's email reaching its intended recipient. To improve the deliverability of email you send through Salesforce, we offer severalsettings and compliance options.

IN THIS SECTION:

Configure Deliverability Settings for Emails Sent from Salesforce

Use the available deliverability options to configure your Salesforce org so that your users' emails from Salesforce get where they're going fast.

Guidelines for Configuring Deliverability Settings for Emails Sent from Salesforce

Two things affect email deliverability: past bounced emails to the same email domain, and email that doesn't comply with a recipient's email security framework. Check out some guidelines to help you handle these roadblocks so your users' emails get where they're going fast.

Create a DKIM Key

Use the DKIM (DomainKeys Identified Mail) key feature to enable Salesforce to sign outbound emails sent on your organization's behalf. A valid signature provides recipients confidence that the email was handled by a third party such as Salesforce in a way authorized by your organization.

Import a DKIM Key

Use the DKIM (DomainKeys Identified Mail) key feature to enable Salesforce to sign outbound emails sent on your organization's behalf.

Enabling Compliance BCC Emails

SEE ALSO:

Let Your Users Send Email from Salesforce

Configure Deliverability Settings for Emails Sent from Salesforce

Use the available deliverability options to configure your Salesforce org so that your users' emails from Salesforce get where they're going fast.

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

2. Select the options that apply to your Salesforce org.

SEE ALSO:

Improve Deliverability of Emails Sent from Salesforce

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To configure email deliverability:
- "Customize Application"

Guidelines for Configuring Deliverability Settings for Emails Sent from Salesforce

Two things affect email deliverability: past bounced emails to the same email domain, and email that doesn't comply with a recipient's email security framework. Check out some guidelines to help you handle these roadblocks so your users' emails get where they're going fast.

Using the Deliverability page in Setup, you can improve email deliverability.

- To control the type of email that your organization sends, use the `Access level` option in the Access to Send Email section. The available options include:

  - `No access`: Prevents all outbound email to and from users.

  - `System email only`: Allows only automatically generated emails, such as new user and password reset emails. Especially useful for controlling email sent from sandboxes so that testing and development work doesn't send test emails to your users. Newly created sandboxes default to `System email only`.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in all editions

- **All email**: Allows all types of outbound email. Default for new, non-sandbox organizations. Sandboxes created before Spring '13 default to **All email**.

- When using bounce management:

  - If you also use Email Relay, make sure that your organization's email server allows the relaying of email sent from Salesforce.

  - If an email to the address for a contact, lead, or person account bounces, an alert shows up next to the address. Other users can't send an email to the address until it's updated or confirmed.

  - Emails bounce to Salesforce and not to the sender's personal email account.

  - Use the Bounced Contacts and Bounced Leads standard report to view a list of email all addresses that have bounced email. The report includes the reason the email was bounced, the date the bounce occurred, and the contact, lead, or person account that bounced the email.

- To comply with your recipients' email security frameworks like SPF:

  - Check **Enable compliance with standard email security mechanisms**. This setting modifies the envelope **From** address of emails sent from Salesforce. The header **From** address remains set to the sender's email address. Usually security frameworks only check the envelope address.

  - If you have recipients using the sender ID email authentication protocol, which isn't widely used, check **Enable Sender ID compliance**. This setting modifies the **Sender** field in the envelope of emails sent from Salesforce to automatically include **no-reply@Salesforce**. All replies from the recipients are still delivered to the sender's email address. The recipients' email client (not Salesforce) may append the phrase "Sent on behalf of" to the **From** field of emails sent from Salesforce.

- To specify how Salesforce uses the Transport Layer Security (TLS) protocol for secure email communication for SMTP sessions, select a **TLS Setting**. The available options include:

  - **Preferred** (default): If the remote server offers TLS, Salesforce upgrades the current SMTP session to use TLS. If TLS is unavailable, Salesforce continues the session without TLS.

  - **Required**: Salesforce continues the session only if the remote server offers TLS. If TLS is unavailable, Salesforce terminates the session without delivering the email.

  - **Preferred Verify**: If the remote server offers TLS, Salesforce upgrades the current SMTP session to use TLS. Before the session initiates, Salesforce verifies the certificate is signed by a valid certificate authority, and that the common name presented in the certificate matches the domain or mail exchange of the current connection. If TLS is available but the certificate is not signed or the common name does not match, Salesforce disconnects the session and does not deliver the email. If TLS is unavailable, Salesforce continues the session without TLS.

  - **Required Verify**: Salesforce continues the session only if the remote server offers TLS, the certificate is signed by a valid certificate authority, and the common name presented in the certificate matches the domain or mail exchange to which Salesforce is connected. If any of these criteria are not met, Salesforce terminates the session without delivering the email.

- If you select a setting other than **Preferred** (the default setting), select **Restrict TLS to these domains** and specify a comma-separated domain list. The asterisk (*) wildcard is allowed; for example, ***.subdomains.com** matches john@aco.subdomains.com and john@bco.subdomains.com (but not john@subdomains.com). If you don't specify domains, Salesforce uses the TLS setting you specify for all outbound emails. This can cause undelivered emails.

SEE ALSO:

Improve Deliverability of Emails Sent from Salesforce

Enabling Compliance BCC Emails

Set Up Email Relay

Test the Deliverability of Emails Sent Through Salesforce

Create a DKIM Key

Use the DKIM (DomainKeys Identified Mail) key feature to enable Salesforce to sign outbound emails sent on your organization's behalf. A valid signature provides recipients confidence that the email was handled by a third party such as Salesforce in a way authorized by your organization.

When you create a DKIM key, Salesforce generates a public and private key pair. You must publish the public key in the DNS, which tells recipients that you, as the owner of the domain, have authorized the use of this key to sign your mail. Salesforce uses the private key to create DKIM signature headers on your outgoing email. Then, recipients of the mail, can compare the signature header with the public key in the DNS to determine that the mail was signed with an authorized key. If your domain also publishes a Domain-based Message Authentication, Reporting and Conformance (DMARC) policy, recipients can use the DKIM signature to verify that the mail conforms to DMARC.

To create a new key:

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

2. Click **Create New Key**.

3. For Selector, enter a unique name.

4. Enter your Domain name.

5. Select the type of Domain Match you'd like to use.

6. Click **Save**.

- The key defaults to Inactive state. Make sure you add the public key to the DNS record before activating the key. DKIM signing is active whenever you have an active DKIM key.

- You can't have more than one active DKIM key per domain name. You might have multiple active DKIM keys if your organization sends mail from more than a single domain or if you use `subdomains` under your organizational domain and have specified domain matching at the `subdomain` level.

- When you insert or update a domain key, it's possible that the change affects existing DKIM keys. For example, if you've set `DomainMatch` to `DomainAndSubdomains` for the example.com domain, and you then set `DomainMatch` to `SubdomainsOnly` for the mail.example.com domain, either key could be used. Here's how we resolve conflicts in the case when domain keys overlap.

  1. If two keys are equally specific about matching for the same domain, the new key replaces and deactivates the existing key.

  2. If a new key is more specific about matching than an existing key, the new key is used and the existing key is modified to no longer apply to the case covered by the new key. For example, because `DomainOnly` and `SubdomainsOnly` are more specific than `DomainAndSubdomains`, a new `DomainOnly` key would change the `DomainMatch` for an existing `DomainAndSubdomains` key to become `SubdomainsOnly`.

  3. If multiple keys have different domains that match the sending domain, the key with the longest domain name is used. In case of a tie, the most specific key is used.

For information about DKIM, see http://dkim.org

SEE ALSO:

Improve Deliverability of Emails Sent from Salesforce

Import a DKIM Key

Import a DKIM Key

Use the DKIM (DomainKeys Identified Mail) key feature to enable Salesforce to sign outbound emails sent on your organization's behalf.

Some companies have multiple Salesforce organizations, and users in those organizations share a domain name in their email address. Therefore, companies that want Salesforce to sign the email sent by those users sometimes want to share DKIM keys. You can do that using this page.

First, create the key and ensure it's working for one organization. To import and use it in another organization, copy the selector name, domain name, and public and private key data from the working key. You can get this data from the detail page for the key you want to import. After you've copied the key data, log in to the target organization and follow these steps to import the key.

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

2. Click **Import a Key**.

3. Enter the same selector name you copied from the original organization.

4. Enter the same domain name you copied from the original organization.

5. Paste in the public and private key data you copied into their respective fields.

6. Select the type of Domain Match you'd like to use. Most likely you'll use the same value that was selected for the key in the original organization.

7. Click **Save**.

Because the public and private key data worked for the original organization, you can typically activate the key in the target organization immediately.

> **Note:** The private key data is an encrypted form of the private key data that's used to sign emails. It's decrypted internally when signing emails. Therefore, it can be used only within Salesforce. For example, you can't take the public and private key data and plug it into an external mail system.

SEE ALSO:

Improve Deliverability of Emails Sent from Salesforce

Create a DKIM Key

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To manage DKIM Keys
- Customize Application

Enabling Compliance BCC Emails

If your organization evaluates all outbound email messages for compliance, you can enable compliance BCC emails to automatically send a hidden copy of each outbound email message to an email address you specify. Enabling compliance BCC emails prevents users from editing the BCC field on any email and disables their `Automatic Bcc` setting under My Email Settings.

To enable compliance BCC emails for your organization:

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

2. Select the `Enable` checkbox.

3. Enter your compliance email address.

4. Click **Save**.

📝 **Note:** The BCC email is automatically sent to the address you specify for any emails your users send, excluding system emails such as password reset or import completion notifications.

Organization-Wide Addresses: Let Users Send Email from Salesforce Using a Common `From` Address

If your Salesforce org requires users to share a common email alias, you can define a list of organization-wide addresses for each user profile. When sending email from Salesforce, users with these profiles can select their own address or the organization-wide address for the email's `From` address. Replies are delivered to selected address.

👁 **Example:** Your org has several users assigned a Support Profile. This profile is associated with an email address called `support@acme.com` and a `Display Name` of *Acme Support*. When these users send an outbound email through Salesforce, they can choose to have their `From` address appear as `support@acme.com` instead of their own Salesforce email address.

The highlighted sections in the following image represents the changes to the `From` address and `Display Name` that the recipient of an email might see.

```
Date: Wed, 22 Apr 2009 18:44:19 +0000
From: Acme Support <support@acme.com>
Sender: <no-reply@salesforce.com>
To: "friend@xyz.com" <friend@xyz.com>
Message-ID: <21746402.461240425859813.JavaMail.sfdc@na1-app1-12-sfm.ops.sfdc.net>
Subject: Here is your data
```

IN THIS SECTION:

Considerations for Using Organization-Wide Addresses for Sending Emails from Salesforce
Before creating and assigning organization-wide addresses to your Salesforce user profiles, review a few details, including information about mass email and reporting.

You can define and manage organization-wide addresses for each user profile. When sending email from Salesforce, users with these profiles can select their own address or the organization-wide address for the email's `From` address. Replies are delivered to selected address.

SEE ALSO:

Considerations for Using Organization-Wide Addresses for Sending Emails from Salesforce

Before creating and assigning organization-wide addresses to your Salesforce user profiles, review a few details, including information about mass email and reporting.

Available in: Salesforce Classic

Available in: **All** Editions

- You cannot use an organization-wide address to send a mass email or a Stay-in-Touch request.
- Organization-wide addresses can't be used in scheduled reports, scheduling dashboards for refresh, sending mail merge emails, and sending meeting requests to contacts and leads.
- You cannot delete or change an organization-wide email address if it is used by an email alert.
- Organization-wide addresses can't be used in scheduled reports, scheduling dashboards for refresh, sending mail merge emails, and sending meeting requests to contacts and leads.

SEE ALSO:

Set Up Organization-Wide Email Addresses

You can define and manage organization-wide addresses for each user profile. When sending email from Salesforce, users with these profiles can select their own address or the organization-wide address for the email's `From` address. Replies are delivered to selected address.

Available in: Salesforce Classic

Available in: **All** Editions

USER PERMISSIONS

To modify organization-wide addresses:
- "Modify All Data"

1. From Setup, enter `Organization-Wide Addresses` in the `Quick Find` box, then select **Organization-Wide Addresses**.
2. To manage organization-wide addresses, use the available options.

To use an organization-wide address, send an email from Salesforce and choose your organization-wide address from the drop-down list.

SEE ALSO:

Organization-Wide Addresses: Let Users Send Email from Salesforce Using a Common From Address

Considerations for Using Organization-Wide Addresses for Sending Emails from Salesforce

Organization-Wide Footers: Let Users Send Email from Salesforce with Common Footers

Let your users save time and apply common messaging to all emails sent from Salesforce by creating organization-wide footers. You can create a separate email footer for each encoding and choose default footers for single and mass email. In Lightning Experience, mail sent via Gmail or Office 365 can contain an organization-wide footer: you choose if it is included.

IN THIS SECTION:

Considerations for Setting Up Organization-Wide Footers for Sending Emails from Salesforce

Before creating organization-wide footers for users in your Salesforce org, review a few details, including information about encoding and defaults.

Set Up Organization-Wide Email Footers

With organization-wide email footers, you can apply common messaging to all emails sent from Salesforce. In just a few clicks, you can create, edit, and deactivate footers, and set default footers.

SEE ALSO:

Let Your Users Send Email from Salesforce

Considerations for Setting Up Organization-Wide Footers for Sending Emails from Salesforce

Before creating organization-wide footers for users in your Salesforce org, review a few details, including information about encoding and defaults.

- Footers are text only. HTML tags aren't rendered.

- If your organization uses Send Through Gmail or Office 365, organization-wide footers do not appear in emails sent from Salesforce.

- You can choose one default footer for single email and one for mass email. These defaults are used when no footer matches an outgoing email's encoding.

- The maximum size of a footer is 32 KB.

- Encoding

  - In Salesforce Classic, the `Email encoding` field lets you determine which emails the footer appears on. For each encoding, you can have one active single email footer and one active mass email footer.

  - In Lightning Experience, the footers are sent in the user's encoding setting.

SEE ALSO:

Organization-Wide Footers: Let Users Send Email from Salesforce with Common Footers

Set Up Organization-Wide Email Footers

With organization-wide email footers, you can apply common messaging to all emails sent from Salesforce. In just a few clicks, you can create, edit, and deactivate footers, and set default footers.

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

2. To create, edit, and deactivate footers; set default footers; and deactivate organization-wide email footers, use the available options.

SEE ALSO:

[Organization-Wide Footers: Let Users Send Email from Salesforce with Common Footers](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To create and edit email footers:
*   "Modify All Data"

Enable Email to Salesforce

Let your users add email to Salesforce records. Email to Salesforce lets users assign emails to leads, contacts, opportunities, and other specific records in Salesforce. That way, it's easy to track sales-related communications.

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

2. Click **Edit**.

3. Select **Active**.

4. If you plan to configure Email to Salesforce to verify the legitimacy of the sending server before processing a message, ensure that the senders who you expect to use Email to Salesforce support at least one of these [authentication protocols](#).

    *   SPF
    *   SenderId
    *   DomainKeys

    Email to Salesforce accepts the email only if the sending server passes at least one of these protocols and doesn't fail any of them.

    To configure Email to Salesforce to verify the legitimacy of the sending server before processing a message, select **Advanced Email Security Settings**.

5. Click **Save**.

6. To notify users that Email to Salesforce is activated, click **Send Notification Email**. Otherwise, click **Skip This Step**.

Salesforce creates a unique Email to Salesforce address for each user. Users view their Email to Salesforce address and customize their settings on the My Email to Salesforce page in their personal settings. For more information, see How Does Email to Salesforce Work?.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To enable or disable Email to Salesforce:
*   "Modify All Data"

Deleting Email Attachments Sent as Links

You can find and delete attachments sent as links. Recipients who subsequently click on the attachment link see a message asking them to contact the email sender to view the attachment. You can search only within your organization's email retention period (typically 30 days, but contact Salesforce Support for your organization's details).

To find and delete email attachments sent as links:

1. From Setup, enter `Attachments` in the `Quick Find` box, then select **Delete Attachments Sent as Links**.

2. Enter either of these.

   - File name (optional), username, and date range:

     - Optionally, attachment file name, including the file extension (for example, `ThisYearResults.pdf`). You can use wildcards (for example, `ThisYearRes` would find `ThisYearResults.pdf`).

     - Sender's username

     - Date range during which the email was sent

   - Attachment URL: Click the attachment link (`.html`) in the email to open it in a browser, and copy and paste the URL.

3. Click **Search**.

   - Search results show up to 100 matching entries.

   - If the attachment was sent using mass email, search results show one entry for every 100 emails sent—delete one of these entries to delete the attachment.

4. In Search Results, click **Del** next to the attachment you want to delete. Recipients who subsequently click on the attachment link see a message asking them to contact the email sender to view the attachment.

   > **Note:** You cannot recover deleted attachments from the Recycle Bin.

EDITIONS

Available in: Salesforce Classic

Available in all editions

USER PERMISSIONS

To delete email attachments sent as links:
- "Modify All Data"

Troubleshoot with Inbound Email Snapshots

Take a snapshot of inbound email messages so you can more easily troubleshoot inbound email errors.

Inbound email snapshots capture a copy of inbound email messages, helping you diagnose issues with email services such as Email to Salesforce, Email-to-Case, and Apex email services. Request a snapshot by specifying criteria for the email's To and From addresses, and when an inbound message meets that criteria, the snapshot records a single copy that you can view and download. The email itself is processed normally without alteration. Snapshots contain the:

- Sender's address
- Inbound email service address
- Date and time of the snapshot
- Full message contents, including headers and attachments

To enable inbound email snapshots, contact Salesforce.

- To access inbound email, from Setup, enter `Email Snapshots` in the `Quick Find` box, then select **Email Snapshots**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To request, view, download, and delete email snapshots:
- "Modify All Data"

- To request an inbound email snapshot, enter criteria for the To address (required) and From address (optional). Then click **Request Snapshot**.

  The requested snapshot is added to the list of Pending and Completed Snapshots. When an inbound message meets your specified criteria, we take a snapshot and complete the request.

- To view a completed snapshot:

Option	Description
View snapshot details	Click **Show Details** to see when the snapshot was taken, the sender's address, and the inbound email service address. Click **Hide Details** to collapse the details section.
Download the snapshot	Click **Download** then either open the email as a .txt file or save it to your computer.

Consider these tips when using inbound email snapshots:

- You can have a maximum combined total of 25 pending and completed snapshots. Delete some to free up space for new snapshots. You can delete any pending or completed snapshot, even if someone else originally requested it.

- Deleted snapshots are permanently deleted. They're not moved to the Recycle Bin.

- When specifying criteria for the To address, keep these tips in mind.

  - The criteria apply to any of the addresses specified in an email's To, CC, or BCC fields (not only the To field).

  - Inbound email service addresses always end in `salesforce.com`.

  - You may want to look up the addresses your organization uses. This table summarizes where to find them.

Type of inbound email address	Where to find addresses
The user's unique Email to Salesforce address	From the user's personal settings, enter `Email to Salesforce` in the `Quick Find` box, then select **Email to Salesforce** to view the unique address assigned to them by Email to Salesforce.
Email routing addresses for Email-to-Case or On-Demand Email-to-Case	From Setup, enter `Email-to-Case` in the `Quick Find` box, then select **Email-to-Case** to open the Email-to-Case settings page. View the Routing Addresses section.
Your organization's email service addresses	From Setup, enter `Email Services` in the `Quick Find` box, then select **Email Services**, then the name of an email service.

- You can use an asterisk (*) wildcard in both the local-part of the email address (the part before the @ symbol) and in the domain-part (the part after the @ symbol). Spaces, commas, and semicolons aren't valid characters. Each address field can contain a maximum of 255 characters.

- If you want to request more than one snapshot with identical criteria, click **Request Snapshot** multiple times.

- If you believe that a snapshot should have completed but it still shows Pending status, try refreshing the page.

- Snapshots don't expire. If no inbound emails match the specified criteria, a requested snapshot remains in Pending status indefinitely. Completed snapshots persist until you delete them.

SEE ALSO:

Email Logs: Monitor Emails Sent Through Salesforce

Working with Mail Merge Templates

Managing Mail Merge Templates

Mail merge templates define the content of a form letter or other mail merge document. They include variables called merge fields where data from your records—for example a contact's name and address—displays in the generated document.

As an administrator, you're responsible for building mail merge templates in Microsoft Word and uploading them to Salesforce to make them available for your users. See the following topics:

- Create Mail Merge Templates explains how to build a new mail merge template from a blank Word document.
- Modify Existing Mail Merge Templates explains how to download sample templates and modify them to meet your unique business needs.
- Uploading Mail Merge Templates to Salesforce explains how to upload completed mail merge templates to Salesforce.

💡 Tip: Download sample mail merge templates to help you get started.

SEE ALSO:

Considerations for Using Merge Fields in Mail Merge Templates

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EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in all editions

USER PERMISSIONS

To upload mail merge templates:
- "Manage Public Templates"

To edit mail merge templates:
- "Manage Public Templates"

Create Visualforce Email Templates

You can create email templates for use in Visualforce pages.

1. Do one of the following:
   - If you have permission to edit public templates, from Setup, enter `Email Templates` in the `Quick Find` box, then select **Email Templates**.
   - If you don't have permission to edit public templates, go to your personal settings. Enter `Templates` in the `Quick Find` box, then select **Email Templates** or **My Templates**—whichever one appears.

2. Click **New Template**.

3. Choose `Visualforce` and click **Next**.

   You can't send a mass email using a Visualforce email template.

4. Choose a folder in which to store the template.

5. To make the template available for use, select the `Available For Use` checkbox.

6. Enter a name in `Email Template Name`.

7. If necessary, change the `Template Unique Name`. This unique name refers to the component when you use the Force.com API. In managed packages, this unique name prevents naming conflicts in package installations. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. With the `Template Unique Name` field, you can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.

8. If desired, choose a different character set from the `Encoding` drop-down list.

9. Enter a description for the template. Both template name and description are for your internal use only.

10. Enter a subject line for your template in `Email Subject`.

11. In the `Recipient Type` drop-down list, select the type of recipient to receive email created from the template.

12. If desired, in the `Related To Type` drop-down list, select the object from which the template retrieves merge field data.

13. Click **Save**.

14. On the Viewing Email Templates page, click **Edit Template**.

15. Enter markup text for your Visualforce email template.

    > **Note:** If you are including an image, we recommend uploading it to the Documents tab to reference the copy of the image on our server. For example:

    ```
    <apex:image id="Logo"
    value="https://yourInstance.salesforce.com/servlet/servlet.ImageServer?
    id=015D0000000Dpwc&oid=00DD0000000FHaG&lastMod=127057656800" />
    ```

16. To specify the version of Visualforce and the API used with this email template, click **Version Settings**. If you've installed managed packages from the AppExchange, you can also specify which version of each managed package to use with this email template. Generally, use the default value for all versions, to associate the email template with the most recent version of Visualforce, the API, and each managed package. To maintain specific behavior, you can specify an older version of Visualforce and the API. To access components or functionality that differ from the most recent package version, you can specify an older version of a managed package.

EDITIONS

Available in: Salesforce Classic

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

Mass email not available in: **Personal**, **Contact Manager**, and **Group** Editions

USER PERMISSIONS

To create or change Visualforce email templates:
- "Customize Application"

To create or change public email template folders:
- "Manage Public Templates"

17. To view the details of the template, click **Save**. To continue editing your template, click **Quick Save**. Your Visualforce markup must be valid before you can save your template.

> Note: The maximum size of a Visualforce email template is 1 MB.
>
> You can't send a mass email using a Visualforce email template. The `{!Receiving_User.`*`field_name`*`}` and `{!Sending_User.`*`field_name`*`}` merge fields work only for mass email and are unavailable in Visualforce email templates.

> Tip:
> - View a sample of the template populated with data from records you choose and send a test email by clicking **Send Test and Verify Merge Fields**. If the email template includes encrypted data, remember that the data is displayed as encrypted within the generated email and in the Visualforce template page. For security reasons, it isn't displayed in plain text.
> - To translate Visualforce email templates based on recipients' or related objects' languages, use the `<messaging:emailTemplate>` tag's `language` attribute (valid values: Salesforce supported language keys, for example, "en-US"). The language attribute accepts merge fields from the email template's `recipientType` and `relatedToType` attributes. You create custom language fields for use in the merge fields. The Translation Workbench is required to translate email templates.

SEE ALSO:

Create HTML Email Templates

Create Custom HTML Email Templates

Developer's Guide: Visualforce Developer's Guide

Create Custom HTML Email Templates

You can create custom HTML email templates without using letterhead. If you don't know HTML, you can paste HTML code into your template.

1. Do one of the following:
   - If you have permission to edit public templates, from Setup, enter `Email Templates` in the `Quick Find` box, then select **Email Templates**.
   - If you don't have permission to edit public templates, go to your personal settings. Enter `Templates` in the `Quick Find` box, then select **Email Templates** or **My Templates**—whichever one appears.

2. Click **New Template**.

3. Choose `Custom (without using Letterhead)` and click **Next**.

4. Choose a folder in which to store the template.

5. To make the template available for use, select the `Available For Use` checkbox.

6. Enter a name in `Email Template Name`.

7. If necessary, change the `Template Unique Name`. This unique name refers to the component when you use the Force.com API. In managed packages, this unique name prevents naming conflicts in package installations. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. With the `Template Unique Name` field, you can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.

8. If desired, choose a different character set from the `Encoding` drop-down list.

9. Enter a `Description` for the template. Both template name and the description are for your internal use only. The description is used as the title of any email activities you log when sending mass email.

10. Click **Next**.

11. Enter a `Subject` for the message.

12. Enter the HTML source text for the message. Include all the HTML tags.

    📝 Note: If you are including an image, we recommend uploading it to the Documents tab. Then you can reference the copy of the image on our server. For example:

    ```
    <img src="https://yourInstance.salesforce.com/servlet/servlet.ImageServer?
    id=015D0000000Dpwc&oid=00DD0000000FHaG&lastMod=1270576568000"/>
    ```

13. If desired, enter merge fields in the template subject and body. When you send an email, these fields are replaced with information from your lead, contact, account, opportunity, case, or solution.

14. Click **Next**.

15. If desired, enter the text-only version of your email or click **Copy text from HTML version** to paste the text from your HTML version without the HTML tags automatically. The text-only version is available to recipients who can't view HTML emails.

    ⚠️ Warning: We recommend that you leave the text-only version blank. If you leave it blank, Salesforce automatically creates the text-only content based on the current HTML version. If you enter content manually, subsequent edits to the HTML version aren't reflected in the text-only version.

16. Click **Save**.

> 💡 **Tip:** View a sample of the template populated with data from records you choose and send a test email by clicking **Send Test and Verify Merge Fields**.

> 📝 **Note:** You can't modify the content of a custom HTML template when you select it for use in an email.

SEE ALSO:

Create HTML Email Templates

Create Visualforce Email Templates

Create HTML Email Templates

You can create HTML email templates using letterhead. You can't change the letterhead or the layout in an existing template. To create an HTML email template, you must have at least one active letterhead.

To create an HTML email template:

1. Do one of the following:

- If you have permission to edit public templates, from Setup, enter `Email Templates` in the `Quick Find` box, then select **Email Templates**.

- If you don't have permission to edit public templates, go to your personal settings. Enter `Templates` in the `Quick Find` box, then select **Email Templates** or **My Templates**—whichever one appears.

2. Click **New Template**.

3. Choose `HTML (using Letterhead)` and click **Next**.

4. Choose a folder in which to store the template.

5. To make the template available for use, select the `Available For Use` checkbox.

6. Enter an `Email Template Name`.

7. If necessary, change the `Template Unique Name`. This unique name refers to the component when you use the Force.com API. In managed packages, this unique name prevents naming conflicts in package installations. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. With the `Template Unique Name` field, you can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.

8. Select a `Letterhead`. The letterhead determines the logo, page color, and text settings of your email. In an existing template, you can't change this field. To use a different letterhead after you've created a template, create another template.

9. Select the `Email Layout`. The email layout determines the columns and page layout of the message text. To see samples, click **View Email Layout Options**. In an existing template, you can't change this field. To use a different email layout after you've created a template, create another template.

10. If desired, choose a different character set from the `Encoding` drop-down list.

11. Enter a `Description` of the template. Both template name and description are for your internal use only. The description is used as the title of any email activities you log when sending mass email.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions, except **Personal**

Mass email not available in: **Personal**, **Contact Manager**, and **Group** Editions

HTML and Visualforce email templates not available in: **Personal** Edition

USER PERMISSIONS

To create or change HTML email templates:
- "Edit HTML Templates"

To create or change public email template folders:
- "Manage Public Templates"

12. Click **Next**.

13. Enter a subject for the email you send.

14. Enter the text of the message by clicking any section and entering text. To prevent anyone using the template from editing a section, click the padlock icon.

15. Change the style of your text by selecting the text and using the format toolbar.

16. If desired, enter merge fields in the template subject and body. When you send an email, these fields are replaced with information from your lead, contact, account, opportunity, case, or solution.

17. Click **Next**.

18. If desired, enter the text-only version of your email or click **Copy text from HTML version** to paste the text from your HTML version without the HTML tags automatically. The text-only version is available to recipients who can't view HTML emails.

> ⚠ Warning: We recommend that you leave the text-only version blank. If you leave it blank, Salesforce automatically creates the text-only content based on the current HTML version. If you enter content manually, subsequent edits to the HTML version aren't reflected in the text-only version.

19. Click **Save**.

> 💡 Tip: View a sample of the template populated with data from records you choose and send a test email by clicking **Send Test and Verify Merge Fields**.

SEE ALSO:

Create Custom HTML Email Templates

Create Visualforce Email Templates

Considerations for Using Merge Fields in Email Templates

A merge field is a field you can put in an email, an email template, a mail merge template, a custom link, or a formula to incorporate values from a record. You can use merge fields in the subject and body of custom HTML templates. When using merge fields, it's a good idea to understand how they work and what to expect in your merged emails.

Guidelines for Syntax and Formatting

The syntax consists of an open curly brace and exclamation point, followed by the object name, a period, the field name, and a closing curly brace. For example, if you want to include the account number of your recipient, you could enter `ID: {!Account.AccountNumber}`, and your recipient's email displays `ID: 001234567890123`.

A merge field's syntax can vary depending on where you're using the field. To make sure you're using the correct syntax, select merge fields from the drop-down list in the editor where you're using the merge field. Most merge fields for email templates correspond directly with email template fields.

> ⓘ Important:
> - If two or more custom objects have matching names or labels, only one of the objects appears when you select from available merge fields. Make sure that all custom objects have unique names and labels so that you can select merge fields from any of the objects.

Guidelines for Using Merge Fields

General

- Don't use a hyperlink formula field in the subject of an email template or in the body of a text email template.

- In email templates, you can add substitute text to any merge field. Substitute text appears in a sent email if the merge record does not contain data for that field. To add substitute text, place a comma after the field name and enter the text before the closing bracket, for example: `Dear {!Contact.FirstName, Valued Customer}`. When you save the template, the merge field appears in the template as `Dear {!BLANKVALUE(Contact.FirstName, "Valued Customer")}`. In this example, if there is no information in the `First Name` field of the contact record, the email you create with your template begins with "Dear Valued Customer".

- The `{!Receiving_User.field_name}` and `{!Sending_User.field_name}` merge fields work only for mass email and are unavailable in Visualforce email templates.

- User fields are also known as `Sending User` fields for administrators and users with the "Manage Users" permission. Use them in email templates when referencing the person sending the email.

- Administrators and users with the "Manage Users" permission can use Receiving User merge fields for email templates to reference the recipient of the email.

- The `Created Date` and `Last Modified Date` fields display only the date, not the date and time.

- If your template contains a merge field for which there is no data in a particular record, that field does not appear in the email you send. To find blank fields, modify your recipient list view to search for the merge fields you are using in your template, and enter the criterion "<field> equals," leaving the third field blank. Edit those records that have blank fields before you send your emails.

- Merge fields have no value if they are defined for an object which doesn't match the recipient and related to record.

Accounts

When account merge fields are included in an email template and this template is selected after a contact is added to the email `To` field, the account merge fields are populated from the contact's account, not the case's account.

Campaigns

- Campaign and campaign member merge fields can be used in email templates, but not mail merge templates.

- Campaign member merge fields cannot be used with other types of merge fields in the same email template. For example, if you create an email template using a campaign member merge field and you want to include the title of the recipient, use `{!CampaignMember.Title}` instead of `{!Lead.Title}` or `{!Contact.Title}`.

Cases

If you have enabled Email-to-Case or On-Demand Email-to-Case, you can create email templates that support agents can use to respond to case emails. These templates can include merge fields that display information from the original email in the response.

Connection Finder

Custom email templates must contain the survey URL. `{!Contact.PartnerSurveyURL}` is available as a contact merge field when creating templates.

Contacts

- In Salesforce Classic, templates with Contact merge fields can be used to generate mail merge documents for leads. Likewise, templates with Lead fields can be used to generate mail merge documents for contacts.

- You can use custom Contact or Lead fields for merging in Salesforce Classic and Lightning Experience, but only for documents for the object the custom fields come from. For example, a custom Lead field can only be used for templates for leads.

Opportunities

Merge fields for products on opportunities are only available to organizations that have enabled products and can only be used in mail merge templates, but not email templates.

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Orders

Merge fields for products on orders in email templates aren't supported.

Workflow

To use merge fields from user records in email templates, select from the following merge field types:

- User Fields—Use these merge fields to represent the sending user. Merge fields named `{!User.field_name}` return values from the user record of the person who created or updated the record that triggered the workflow rule.

- Workflow Target User Fields—Use these merge fields only in email templates for workflow rules on the User object. Merge fields named `{!Target_User.field_name}` return values from the user record that was created or updated to trigger the workflow rule.

This release contains a beta version of workflow on the User object that is production quality but has known limitations. To provide feedback and suggestions, go to IdeaExchange.

Merge Fields for Visualforce Email Templates

A merge field is a field you can put in an email template, mail merge template, custom link, or formula to incorporate values from a record.

Syntax and Formatting

Merge fields for Visualforce email templates use the same expression language as formulas:

> **EDITIONS**
>
> Available in: Salesforce Classic
>
> Available in: **Group, Enterprise, Performance, Unlimited, Developer, and Contact Manager** Editions
>
> Mass email not available in: **Personal**, **Contact Manager**, and **Group** Editions

```
{!Object_Name.Field_Name}
```

For example, you can start your email template with `Hello, {!Contact.FirstName}`. When you send the template, each recipient will see their first name in place of the merge field. If your recipient's first name is John, he will see `Hello, John!` when he opens the email.

Tips

- You can't send a mass email using a Visualforce email template. `{!Receiving_User.field_name}` and `{!Sending_User.field_name}` are used for mass email and aren't available for Visualforce email templates.

- To translate Visualforce email templates based on recipients' or related objects' languages, use the `<messaging:emailTemplate>` tag's language attribute. Valid values are Salesforce-supported language keys, such as "en-us" for English (US). The language attribute accepts merge fields from the email template's `recipientType` and

`relatedToType` attributes. You create custom language fields for use in the merge fields. The Translation Workbench is required to translate email templates.

Considerations for Using Merge Fields in Mail Merge Templates

When you use merge fields in mail merge templates, you can incorporate data from your records into the mail merge templates you create in Microsoft Word. It's a good idea to understand how merge fields work so that you know what to expect in your merged documents.

Guidelines for Syntax and Formatting

Mail merge templates are created by uploading documents to Salesforce from your desktop. The syntax for these merge fields is *OBJECT_FIELD_NAME* or *FIELD_NAME*. Merge fields for mail merge templates must:

- Be unique
- Contain only letters, numbers, and the underscore (_) character
- Not exceed 40 characters

For example: `AccountNumber`. To make sure that you're using the correct syntax, use Connect for Office to insert merge fields into your mail merge template.

Merge Field Compatibility

- You can use custom Contact or Lead fields for merging, but only for documents generated from that field's object. For example, a custom Lead field can only be used for templates for leads.
- Merge fields for products on opportunities are only available to organizations that have enabled products.
- Approval Process merge fields can be used in email templates, but not mail merge templates.
- Campaign and campaign member merge fields cannot be used in mail merge templates.

> **EDITIONS**
>
> This feature is available in Salesforce Classic
>
> Available in all editions

Managing Version Settings for Visualforce Email Templates

To aid backwards-compatibility, each Visualforce email template is saved with version settings for the specified version of Visualforce and the API. If the Visualforce email template references installed managed packages, the version settings for each managed package referenced by the Visualforce component are saved too. This ensures that as Visualforce, the API, and the components in managed packages evolve in subsequent versions, a Visualforce email template is still bound to versions with specific, known behavior.

A package version is a number that identifies the set of components uploaded in a package. The version number has the format $majorNumber.minorNumber.patchNumber$ (for example, 2.1.3). The major and minor numbers increase to a chosen value during every major release. The $patchNumber$ is generated and updated only for a patch release. Publishers can use package versions to evolve the components in their managed packages gracefully by releasing subsequent package versions without breaking existing customer integrations using the package.

To set the Salesforce API and Visualforce version for an existing Visualforce email template:

1. Do one of the following:

    *   If you have permission to edit public templates, from Setup, enter `Email Templates` in the `Quick Find` box, then select **Email Templates**.

    *   If you don't have permission to edit public templates, go to your personal settings. Enter `Templates` in the `Quick Find` box, then select **Email Templates** or **My Templates**—whichever one appears.

2. Click the `Email Template Name` for the Visualforce email template.

3. Click **Edit Template** and then click **Version Settings**.

4. Select the `Version` of the Salesforce API. This is also the version of Visualforce used with this template.

5. Click **Save**.

To configure the package version settings for a Visualforce email template:

1. Do one of the following:

    *   If you have permission to edit public templates, from Setup, enter `Email Templates` in the `Quick Find` box, then select **Email Templates**.

    *   If you don't have permission to edit public templates, go to your personal settings. Enter `Templates` in the `Quick Find` box, then select **Email Templates** or **My Templates**—whichever one appears.

2. Click the `Email Template Name` for the Visualforce email template.

3. Click **Edit Template** and then click **Version Settings**.

4. Select a `Version` for each managed package referenced by the Visualforce email template. This version of the managed package continues to be used by the Visualforce email template if later versions of the managed package are installed, unless you manually update the version setting. To add an installed managed package to the settings list, select a package from the list of available packages. The list is only displayed if you have an installed managed package that is not already associated with the Visualforce email template.

5. Click **Save**.

Note the following when working with package version settings:

*   If you save a Visualforce email template that references a managed package without specifying a version of the managed package, the Visualforce email template is associated with the latest installed version of the managed package by default.

- You can't **Remove** a Visualforce email template's version setting for a managed package if the package is referenced by the Visualforce email template.

SEE ALSO:

Create Visualforce Email Templates

Create HTML Email Templates

Create Custom HTML Email Templates

Connect Offline

Desktop Client Access

Connect Offline and Connect for Office are desktop clients that integrate Salesforce with your PC. As an administrator, you can control which desktop clients your users can access as well as whether users are automatically notified when updates are available.

To set permissions for Salesforce for Outlook, use the "Manage Email Client Configurations" permission.

You can set users' access to desktop client by editing their profiles.

The desktop client access options are:

Option	Meaning
Off (access denied)	The respective client download page in users' personal settings is hidden. Also, users can't log in from the client.
On, no updates	The respective client download page in users' personal settings is hidden. Users can log in from the client but can't upgrade it from their current version.
On, updates w/o alerts	Users can download, log in from, and upgrade the client, but don't see alerts when a new version is made available.
On, updates w/alerts	Users can download, log in from, and upgrade the client. They can see update alerts, and can follow or ignore them.
On, must update w/alerts	Users can download, log in from, and upgrade the client. When a new version is available, they can see an update alert. They can't log in from the client until they have upgraded it.

Connect Offline is the only client available with Developer Edition. In Personal, Group, and Professional Editions, all users have the system default "On, updates w/o alerts" for all clients.

📝 Note:

- Desktop client access is available only for users whose profiles have the "API Enabled" permission.

If users can see alerts and they have logged in to Salesforce from the client in the past, an alert banner automatically appears in the Home tab when a new version is available. Clicking the banner opens the Check for Updates page, where users can download and run installer files. From their personal settings, users can also access the **Check for Updates** page, regardless of whether an alert has occurred.

Install Connect Offline

Allocating Connect Offline Licenses

For Salesforce orgs using Professional, Performance, Unlimited, Enterprise, and Developer Editions, Salesforce provides one Connect Offline license for each Salesforce license. Users without a Connect Offline license can use for a 30-day trial period.

To allocate a Connect Offline license to a user within your organization, edit the user's record and select the `Offline User` checkbox. Users must have this checkbox selected to use Force.com Connect Offline.

Verifying System Requirements

The system requirements for Connect Offline are:

- Microsoft® Internet Explorer® 6, 7, or 8 (We don't support other browsers, including Mozilla® Firefox®, Apple® Safari®, and Google Chrome™.)

- Microsoft Windows® 2000, Windows XP, Windows Vista®, or Windows 7

  > Note: The 32-bit version of Internet Explorer 8 with its Compatibility View option is required for the 64-bit version of these operating systems.

- 256 MB of RAM (512 MB recommended)

- 20 MB of disk space minimum (250 MB recommended depending on the size of the briefcase)

- Intel® Pentium® II processor, 500 MHz or above

Installing an Individual Client

To download and install the Connect Offline client:

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

2. Click **Install Now**.

   > Note: You must have administrator privileges on the computer on which you install Connect Offline.

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

4. Follow the prompts in the setup wizard to complete the installation.

5. Log in to Connect Offline to verify the installation.

Deploying Connect Offline System-Wide

If your organization uses Windows, network administrators can install Connect Offline on several machines at once. For mass deployments, go to the Connect Offline page in your personal settings and click the link to download the zipped MSI package.

> Tip: The login history lists the version of Connect Offline that each user is using.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view records in Connect Offline:
- "Read" on the appropriate type of record such as accounts, contacts, or opportunities

To update records in Connect Offline:
- "Create," "Edit," or "Delete" on the appropriate type of record such as accounts, contacts, or opportunities

Updating Connect Offline

Salesforce periodically releases Connect Offline updates and notifies users according to settings in their user profiles.

Sample Offline Data Sets

Many administrators create briefcase configurations based on the functional groups in their organization because users in the same group usually have similar offline requirements for data. Below are sample data sets for common Salesforce groups. Your Connect Offline users have unique needs, but you can use the examples as a reference to help you get started with data sets in briefcase configurations.

Sales Manager

Sales managers usually need to see records they own and also the records of their subordinates. They also tend to closely monitor large deals in the pipeline.

This briefcase configuration allows sales managers to see:

- The opportunities they own
- The opportunities owned by users who report to them in the role hierarchy
- All opportunities scheduled to close in the current quarter with an amount greater than $100,000
- All accounts related to the opportunities
- A subset of their contact and activity records

Sample Briefcase Configuration for Sales Managers

Object	Ownership Filter	Field Filter	Max Records	Order By
Opportunity	User's Team's Records	(Close Date equals THIS QUARTER) AND (Amount greater than "100,000")	No Limit	
⌐ Account	All Records		No Limit	
Contact	User's Records		500	Last Activity (Decending)
Task	User's Records	Closed equals False	No Limit	
Event	All Records	Date equals TODAY OR Date equals NEXT 30 DAYS	No Limit	

Sales Engineer

The sales engineer briefcase configuration retrieves opportunities owned by the other members of the user's opportunity team, but does not include the user's records. The sales engineer briefcase configuration is opportunity-based because all accounts and contacts included in the briefcase are related to the opportunities. The sales engineers would see:

- Up to 5000 opportunities they own and up to 5000 opportunities that list them on the opportunity team. These opportunities must be either open or have a close date in the current month, the past two months, or up to 24 months in the future. If more than 5000 opportunities exist, the 5000 most recently modified records are synchronized.
- All accounts, contacts, and opportunity products related to those opportunities
- A subset of tasks and events related to those opportunities

Sample Briefcase Configuration for Sales Engineers

Object	Ownership Filter	Field Filter	Max Records	Order By
Opportunity	User's Sales Team's Records	Closed equals False	No Limit	
└── Account	All Records		No Limit	
└── Contact	All Records		No Limit	
└── Task	All Records	Due Date equals LAST 30 DAYS OR Due Date equals NEXT 30 DAYS	No Limit	
└── Event	All Records	Date equals LAST 30 DAYS OR Date equals NEXT 30 DAYS	No Limit	
Task	User's Records	Closed equals False	No Limit	
Event	User's Records	Date equals TODAY OR Date equals NEXT 30 DAYS	No Limit	

Account Executive

The account executive briefcase configuration is account-based, which means the briefcase includes the user's accounts and opportunities related to those accounts. The opportunities are filtered so that only open opportunities scheduled to close in the current quarter are synchronized. The Task and Event child data sets retrieve all activities related to those opportunities, not just the user's activities. Only open tasks and events from a two-month window are sent to the briefcase. The Task and Event parent data sets pull down just the user's activities and restrict the activities to open tasks and events scheduled for the next 30 days. The Contact data set delivers the user's contact records, but limits the record count to the 500 most recently active contacts.

Sample Briefcase Configuration for Account Executives

Object	Ownership Filter	Field Filter	Max Records	Order By
Account	User's Records		No Limit	
└── Opportunity	User's Records	(Closed equals False) AND (Close Date equals THIS QUARTER)	No Limit	
└── Event	All Records	(Date equals LAST 30 DAYS) AND (Date equals NEXT 30 DAYS)	No Limit	
└── Task	All Records	Due Date equals LAST 30 DAYS OR Due Date equals NEXT 30 DAYS	No Limit	
Contact	User's Records		500	Last Activity (Decending)
Task	User's Records	Closed equals False	No Limit	
Event	User's Records	Date equals TODAY OR Date equals NEXT 30 DAYS	No Limit	

Set Up Users to Experience Salesforce from Microsoft® or Google Email and Calendar Applications

You know that your reps spend tons of time working prospects from their email and scheduling appointments from their calendars. Help reps be more productive by setting them up to get their Salesforce work done directly from those applications. Our email integration features let reps view and create Salesforce records and add emails to Salesforce without ever leaving Microsoft Outlook® or Gmail™. You can also set up users to sync Microsoft or Google contacts and events with Salesforce.

IN THIS SECTION:

Which Email Integration Product Is Right for My Company?

Salesforce offers several products that let the reps at your company integrate Salesforce with Microsoft® or Google email and calendar applications. Before settling on a product, review your options to choose the one that best addresses your reps' needs.

Lightning for Outlook: Set Up Sales Reps to Experience Salesforce from Microsoft® Outlook®

Get your sales teams to stay on top of important sales opportunities. Using Microsoft® Outlook® Web App (OWA), Outlook 2016, Outlook for Mac 2016, or Outlook 2013, sales teams can manage their sales more efficiently. Your sales reps can add email and attachments to Salesforce records. Also, they can create Salesforce records using global actions—directly in their email applications.

Lightning for Gmail: Let Sales Reps Experience Salesforce from Gmail™ (Beta)

Give your sales teams visibility into Salesforce content right where they work, so they can efficiently manage their sales pipeline and close deals faster—directly from Gmail™. Lightning for Gmail—the email integration for Gmail users—gives reps a quick view of their sales-related records without making them switch between Salesforce and Gmail.

Lightning Sync: Sync Your Sales Reps' Microsoft® or Google Contacts and Events with Salesforce

Help your sales reps keep contacts and events in sync between their email applications and Salesforce using our cloud-based email integration feature. What's so great about syncing from the cloud, you ask? Well, it means that to get the job done, you don't have to ask your reps to install software. It also means that your IT pros do less work to maintain the feature.

Email Application Publisher Layouts: Set Up Reps to Create Records Directly from Microsoft® Outlook® or Gmail™

Let Lightning for Outlook, Lightning for Gmail, or Salesforce for Outlook users create accounts, cases, leads, opportunities, and even custom objects directly from their email applications. Reps create records using actions menus, which you set up from Salesforce. Your Salesforce edition determines how you set up action menus and whether you can customize them.

Connect for Outlook: (Retired)

Before you get interested in our retired, legacy Connect for Outlook product, we urge you to explore either our cloud- or desktop-based Microsoft integration products: Lightning for Outlook or Salesforce for Outlook.

EDITIONS

Lightning for Outlook, Lightning for Gmail (beta), Lightning Sync, and Salesforce for Outlook are available to be managed from both Salesforce Classic and Lightning Experience

Lightning for Outlook is available with Sales Cloud, Service Cloud, and Force.com in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Lightning for Gmail (beta) is available with Sales Cloud, Service Cloud, and Force.com in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Lightning Sync is available with Sales Cloud in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Salesforce for Outlook is available with Sales Cloud in: **All** Editions

Which Email Integration Product Is Right for My Company?

Salesforce offers several products that let the reps at your company integrate Salesforce with Microsoft® or Google email and calendar applications. Before settling on a product, review your options to choose the one that best addresses your reps' needs.

Review our recommendations for the email or calendar integration product that best suits your reps.

For sales reps working with these applications or products	We recommend this Salesforce product	Learn More
Microsoft® email applications—already integrating with Salesforce using Salesforce for Outlook	Learn about how our cloud-based Microsoft integration products, Lightning for Outlook and Lightning Sync, require less maintenance from your company's IT pros. That's because those features don't require user installation or regular upgrades. If your sales reps meet the system requirements, review our migration considerations to move reps onto the latest and greatest Microsoft integration features right away.	• Microsoft Integration Trail: Microsoft Integration Benefits • Considerations for Migrating from Salesforce for Outlook to Lightning for Outlook and Lightning Sync
Microsoft email and calendar applications	Learn about our different Microsoft integration products and decide which is right for your reps.	Microsoft Integration Trail: Microsoft Integration Benefits
Google Calendar™ and Google Contacts	Learn about Lightning Sync for Google and decide if it's right for your reps.	Lightning Sync for Google (Beta)
Gmail™	Learn about Lightning for Gmail and decide if it's right for your reps.	Lightning for Gmail: Let Sales Reps Experience Salesforce from Gmail™ (Beta)

Considerations for Migrating from Salesforce for Outlook to Lightning for Outlook and Lightning Sync

Before you migrate from Salesforce for Outlook to Lightning for Outlook and Lightning Sync, get up to speed on these sync considerations.

IN THIS SECTION:

Limitations for Running Lightning for Outlook and Salesforce for Outlook Simultaneously

While you can enable both Lightning for Outlook and the Salesforce for Outlook Side Panel in the same organization, users can't run both Microsoft® integration features at the same time.

How Lightning Sync Manages Sync Conflicts with Salesforce for Outlook

Learn how Salesforce manages sync conflicts when users are assigned to sync the same records for both features.

SEE ALSO:

Lightning Sync Considerations

> **EDITIONS**
>
> Available to manage from: Salesforce Classic and Lightning Experience
>
> Lightning for Outlook available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
>
> Lightning Sync available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
>
> Salesforce for Outlook available in: **All** Editions

Limitations for Running Lightning for Outlook and Salesforce for Outlook Simultaneously

While you can enable both Lightning for Outlook and the Salesforce for Outlook Side Panel in the same organization, users can't run both Microsoft® integration features at the same time.

To prevent your users from juggling multiple email integration features at one time, Salesforce automatically disconnects the Salesforce for Outlook side panel when users connect to Lightning for Outlook. Folks who use Lightning for Outlook can still download, install, and sync with Salesforce for Outlook, but only Lightning for Outlook can run in Outlook.

SEE ALSO:

Which Email Integration Product Is Right for My Company?

How Lightning Sync Manages Sync Conflicts with Salesforce for Outlook

> **EDITIONS**
>
> Available to manage from: Salesforce Classic and Lightning Experience
>
> Lightning for Outlook available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
>
> Salesforce for Outlook available in: **All** Editions

How Lightning Sync Manages Sync Conflicts with Salesforce for Outlook

Learn how Salesforce manages sync conflicts when users are assigned to sync the same records for both features.

If you're migrating your users from Salesforce for Outlook to Lightning Sync, we recommend disabling Salesforce for Outlook for your Lightning Sync users.

Though Salesforce manages these conflicts for you, this best practice prevents you from creating complicated sync configurations that could become difficult to manage later.

If you don't disable Salesforce for Outlook for Lightning Sync users, and you've assigned a user to sync the same records with conflicting settings in both an Outlook configuration and a Lightning Sync configuration, Salesforce automatically gives preference to the settings you've set for that kind of record in the Lightning Sync configuration.

Because Salesforce gives preference by record, not by configuration, either or both features could sync your reps Microsoft® items.

For example, if a user is assigned to sync contacts, events, and tasks in an Outlook configuration and contacts and events in an Lightning Sync configuration, then the users' tasks would sync with Salesforce for Outlook, and the users' contacts and events would sync with Lightning Sync.

> **EDITIONS**
>
> Available to manage from: Salesforce Classic and Lightning Experience
>
> Lightning Sync available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
>
> Salesforce for Outlook available in: **All** Editions

SEE ALSO:

Which Email Integration Product Is Right for My Company?

Limitations for Running Lightning for Outlook and Salesforce for Outlook Simultaneously

Lightning for Outlook: Set Up Sales Reps to Experience Salesforce from Microsoft® Outlook®

Get your sales teams to stay on top of important sales opportunities. Using Microsoft® Outlook® Web App (OWA), Outlook 2016, Outlook for Mac 2016, or Outlook 2013, sales teams can manage their sales more efficiently. Your sales reps can add email and attachments to Salesforce records. Also, they can create Salesforce records using global actions—directly in their email applications.

First, you enable Lightning for Outlook, and then your sales team members complete their short setup procedures. After that, teammates select an email or an event in Outlook (1) and then select `Salesforce` (2). That's when your reps see related contacts, leads, and users. Reps can also see related accounts, opportunities, and cases (3).

> **EDITIONS**
>
> Available in: Salesforce Classic and Lightning Experience
>
> Available with Sales Cloud, Service Cloud, and Force.com in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Sales reps can create Salesforce records directly from Outlook (4). Reps select the record to see more details about it, including Chatter feed, activity timeline, and related lists in Lightning for Outlook. With the inline edit feature, they can also modify records in their email application. Or, reps get complete details about the record or the email related to it directly in Salesforce (5).

Similar to the way sales reps relate emails, Lightning for Outlook lets reps relate these calendar events to Salesforce records.

- Any event that reps attend

- Any event that reps organize, provided they're working in Outlook 2016 for Windows *or* Outlook Web App on Office 365

To relate an event, reps select it in their Microsoft email application. Then, they select Salesforce (1).

Relevant Salesforce records appear (2). And like when reps work with emails, your reps can select a record to see more details in their email application. Or, they can create a record or get complete details about the record directly in Salesforce (3).

IN THIS SECTION:

Set Up Sales Teams to Experience Salesforce in Microsoft® Outlook®

Help your teams see and create Salesforce records with global actions directly in Outlook Web App (OWA), Outlook 2016, Outlook for Mac 2016, and Outlook 2013.

Customize Lightning for Outlook for Your Sales Reps

Help your Lightning for Outlook users get more done by customizing the Salesforce content they see and work with from Microsoft® Outlook®.

Set Up Sales Teams to Experience Salesforce in Microsoft® Outlook®

Help your teams see and create Salesforce records with global actions directly in Outlook Web App (OWA), Outlook 2016, Outlook for Mac 2016, and Outlook 2013.

1. From Salesforce Setup, enter `Lightning for Outlook` in the `Quick Find` box, then select **Lightning for Outlook Settings**.
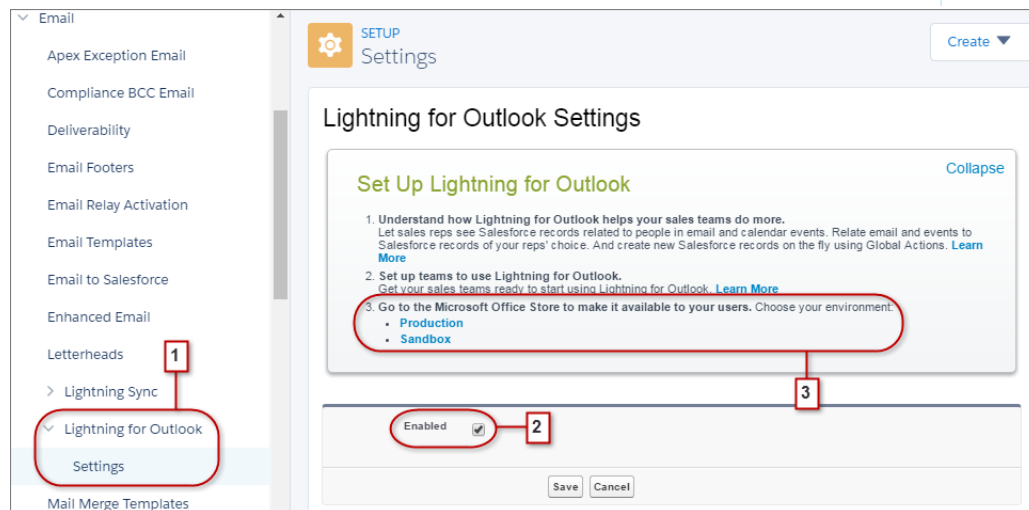
2. Enable Lightning for Outlook. Save your changes.

   After the whitelist and mapping sections appear, there's no need for you to change them.

3. Choose the environment in which you're setting up Lightning for Outlook.

   💡 **Tip:** Help your sales teams help themselves! From the Microsoft Office Store, make Lightning for Outlook available for your sales teams to install. That way, you spend less time installing Lightning for Outlook for fewer teammates.

4. If you're using Office 365, allow Salesforce access from the Office 365 Outlook Web App domain. If you're using custom Outlook Web App domains, add those domains to allow access.

IN THIS SECTION:

[Add Lightning for Outlook from the Microsoft® Exchange® Center](#)

Before your sales teams can experience Lightning for Outlook, your team members need access to the Lightning for Outlook add-in. Team members can get and enable the add-in themselves. Alternatively, you can help them complete this step faster and avoid setup issues at the same time. Ask your company's Microsoft Exchange administrator to give all team members access to the Lightning for Outlook add-in simultaneously. That way, your sales reps can save time and begin working in Lightning for Outlook right away.

Add Lightning for Outlook from the Microsoft® Exchange® Center

Before your sales teams can experience Lightning for Outlook, your team members need access to the Lightning for Outlook add-in. Team members can get and enable the add-in themselves. Alternatively, you can help them complete this step faster and avoid setup issues at the same time. Ask your company's Microsoft Exchange administrator to give all team members access to the Lightning for Outlook add-in simultaneously. That way, your sales reps can save time and begin working in Lightning for Outlook right away.

> 💡 **Tip:** To authorize Outlook users to add Office add-ins, such as Lightning for Outlook, make sure they have the right permissions. For more information, review this [Microsoft article](#).

To enable the Lightning for Outlook add-in for your team, work with your Exchange administrator to complete these steps from the Microsoft Exchange admin center.

1. In the Exchange admin center, click the **Admin** tile to go to the Admin center.

2. From the Admin center, click **Exchange**.

3. Under organization, click **add-ins**.

4. Click ➕▾ and select the **Add from the Office Store** option.

   > 📝 **Note:** The **Add from URL** and **Add from file** options are not available.

5. From the Add-ins for Outlook page, enter `Lightning for Outlook` in the `Search` box and select **Salesforce Lightning for Outlook** from the search results.

6. Click **Add** to confirm that you want to get the Lightning for Outlook add-in.

   > ⛔ **Important:** To avoid errors at this step, make sure your Exchange server can connect to the Microsoft Office Store.

7. From the **Manage Add-in** page, set one of these options depending on how you want to give your reps access to the Lightning for Outlook add-in.

   - **Optional, enabled by default**
   - **Optional, disabled by default**
   - **Mandatory, always enabled. Users can't disable this add-in.**

   > 📝 **Note:** To enable the Lightning for Outlook add-in for a subset of your reps, you can use PowerShell™ commands. For more information, review the [Microsoft Exchange Mailbox cmdlets article](#).

To make Lightning for Outlook available to your sales teams, complete the steps to enable Lightning for Outlook in Salesforce.

SEE ALSO:

[Microsoft Exchange New-App Library:](#)

EDITIONS

Available in: Salesforce
Classic and Lightning
Experience

Available with Sales Cloud,
Service Cloud, and
Force.com in: **Group**,
Professional, **Enterprise**,
Performance, **Unlimited**,
and **Developer** Editions

USER PERMISSIONS

To enable Lightning for
Outlook add-in
- Administrative access to
  your company's
  Exchange account

Customize Lightning for Outlook for Your Sales Reps

Help your Lightning for Outlook users get more done by customizing the Salesforce content they see and work with from Microsoft® Outlook®.

To customize Lightning for Outlook for your users, you must first enable custom content for Lightning for Outlook.

1. From Setup, enter `Lightning for Outlook` in the `Quick Find` box, and select **Lightning for Outlook Settings**.

2. Enable **Customize content with App Builder (beta)**.

3. In Salesforce Classic, click **Save**.
   Now you're ready to create custom email application panes with the Lightning App Builder.

IN THIS SECTION:

1. Create Custom Email Application Panes for Lightning for Outlook Users
   Choose the Salesforce content that sales reps see from Lightning for Outlook by creating custom email application panes with the Lightning App Builder.

2. Assign Custom Email Application Panes to Lightning for Outlook Users
   To roll out custom email application panes to Lightning for Outlook users, activate the panes and assign them to user profiles.

Create Custom Email Application Panes for Lightning for Outlook Users

Choose the Salesforce content that sales reps see from Lightning for Outlook by creating custom email application panes with the Lightning App Builder.

Create an email application pane and add the standard or custom components you want your Lightning for Outlook users to see and work with from Outlook. You can also use components you find on AppExchange.

1. Create an email application pane. The steps are different depending on whether you're working from Lightning Experience or Salesforce Classic.

   - In Lightning Experience:

     From Setup, enter `Lightning for Outlook` in the `Quick Find` box, and select **Settings**. Click **New** under Email Application Panes.

   - In Salesforce Classic:

     From Setup, enter `App Builder` in the `Quick Find` box, and select **New** under Lightning Pages.

2. Select **Email Application Pane (Beta)**.

3. Give your pane a unique label, and click **Next**.

4. To start with an empty layout, select the Pane template. To start with a layout prepopulated with standard components, clone the system default page.

5. Click **Finish**.

6. Drag components onto the pane.

   You can drag components up or down to rearrange their order.

7. Click in the empty area of the canvas to view the page properties and add a description for your pane.

8. Click **Save**.

To make the email application pane available to Lightning for Outlook users, activate the pane and assign it to user profiles.

SEE ALSO:

Customize Lightning for Outlook for Your Sales Reps

Assign Custom Email Application Panes to Lightning for Outlook Users

To roll out custom email application panes to Lightning for Outlook users, activate the panes and assign them to user profiles.

You can set a pane as default for all users, or assign it to specific user profiles.

Follow these steps to edit pane assignments.

1. Access your email application panes. You complete this step differently depending on whether you're working from Lightning Experience or Salesforce Classic.

   - In Lightning Experience, from Setup, enter `Lightning for Outlook` in the `Quick Find` box, and select **Lightning for Outlook Settings**.

   - In Salesforce Classic, from Setup, enter `App Builder` in the `Quick Find` box, and select **Lightning App Builder Settings**.

2. Click **Edit** for the user profile you want to activate.

3. Click **Activation**.

   > **Note:** From Lightning Experience, you can assign an email application pane to multiple user profiles by clicking **Set Page Assignments**.

SEE ALSO:

Customize Lightning for Outlook for Your Sales Reps

Lightning for Gmail: Let Sales Reps Experience Salesforce from Gmail™ (Beta)

Give your sales teams visibility into Salesforce content right where they work, so they can efficiently manage their sales pipeline and close deals faster—directly from Gmail™. Lightning for Gmail—the email integration for Gmail users—gives reps a quick view of their sales-related records without making them switch between Salesforce and Gmail.

> **Note:** This release contains a beta version of Lightning for Gmail, which means it's a high-quality feature with known limitations. Lightning for Gmail isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for this feature in the IdeaExchange

After you enable Lightning for Gmail for your sales team, your team members can:

- View Salesforce contacts, leads, accounts, opportunities, and cases relevant to the Gmail messages they received or sent (1).

- Search for custom object records and create a Salesforce record using actions available to them. With the inline editing feature, they can also modify records without leaving Gmail (2).
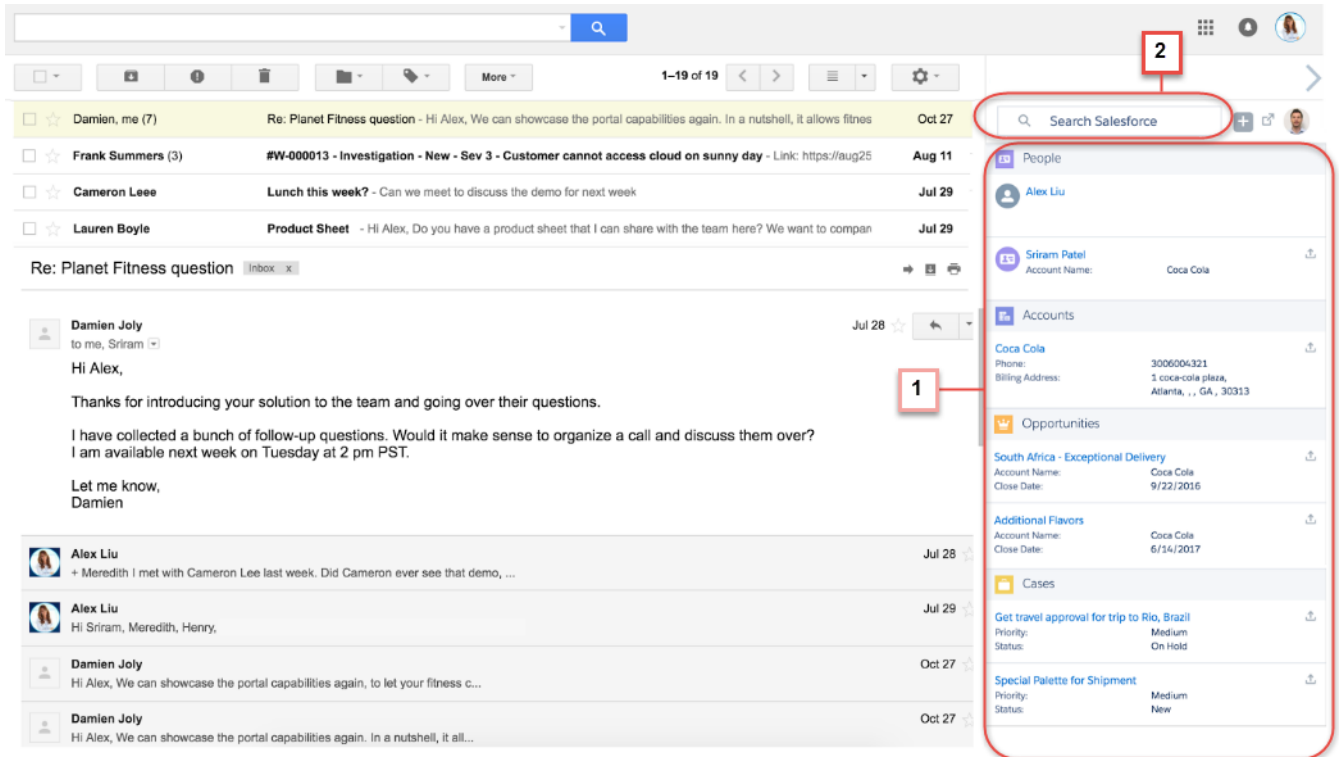
- Drill down for more details on a Salesforce record right from Lightning for Gmail. In addition to a record's detail page, reps get to see its Chatter feed, activity timeline, and related lists.
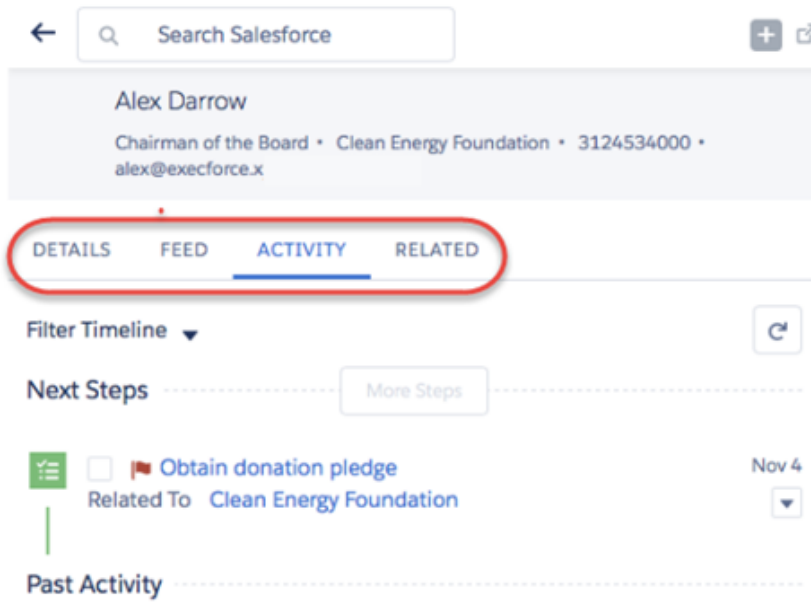
- View and relate Salesforce records to Google Calendar events and emails.

IN THIS SECTION:

Lightning for Gmail: Set Up Sales Reps to Experience Salesforce from Gmail™ (Beta)

Help your sales teams see, create, and modify Salesforce records directly in Gmail.

🛇 **Important:** Before you let your sales teams experience Lightning for Gmail, verify that Enhanced Email is enabled for your organization. Then, contact Salesforce Customer Support to get access to Enhanced Email for Lightning for Gmail.

After getting access to Enhanced Email for Lightning for Gmail, complete these steps to enable Lightning for Gmail for your sales teams.

1. From Salesforce Setup, enter `Lightning for Gmail` in the `Quick Find` box, then select **Lightning for Gmail (beta) Settings**.

2. Enable Lightning for Gmail.

3. To let reps relate emails to relevant Salesforce records, enable Enhanced Email with Lightning for Gmail.

4. To give sales reps access to global actions in Lightning for Gmail, create new or assign existing publisher layouts from the **Lightning for Gmail Publisher Layouts** section. Save your changes.

Next, to begin working with Lightning for Gmail, your sales team members complete their short setup procedure in Gmail.

EDITIONS

Available to manage from Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable Lightning for Gmail
- "Customize Application"

Lightning for Gmail: Enhanced Email (Beta)

Turn on Enhanced Email with Lightning for Gmail for your reps, so they can relate emails to relevant Salesforce records quickly and easily.

With Enhanced Email, when reps relate an email to a relevant account, opportunity, case, custom object, or contact, all contacts, leads, and users on the email are automatically related. The emails are added to Salesforce as Email Message records. So, reps can view emails in rich text format from Salesforce. Emails in Salesforce appear with their bold, italic, underlined, and colored characters, and their lists and tables intact. When you enable Enhanced Email for your reps, they can also add attachments to relevant Salesforce records.

EDITIONS

Available to manage from Salesforce Classic and Lightning Experience

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

Considerations for Enhanced Email with Lightning for Gmail

Before turning on Enhanced Email for Lightning for Gmail, there are some considerations to think about.

- Sales reps can relate an email to people, including contacts, leads, and Salesforce users who are included on the email recipient list.
- In addition to the email recipients, sales reps can relate an email to one more Salesforce record, such as account, opportunity, case, or custom object.
- For emails related to a case, sales reps can change the relationship to another case after deleting the original Email Message record to remove the original relationships.

- For emails related to a lead, sales reps can change the relationship to another lead if that lead is the email's recipient or sender.
- For emails related to an account, opportunity or a custom object record, sales reps can change the relationship to any other Salesforce records, except cases.

Lightning Sync: Sync Your Sales Reps' Microsoft® or Google Contacts and Events with Salesforce

Help your sales reps keep contacts and events in sync between their email applications and Salesforce using our cloud-based email integration feature. What's so great about syncing from the cloud, you ask? Well, it means that to get the job done, you don't have to ask your reps to install software. It also means that your IT pros do less work to maintain the feature.

Lightning Sync is compatible with several versions of Microsoft Exchange, Google Contacts, and Google Calendar™.

Lightning Sync for Microsoft Exchange syncs reps' contacts between systems, and reps' events from their Exchange-based calendar to Salesforce. Lightning Sync for Google (Beta) syncs reps' contacts from Salesforce to Google Contacts and their events from their Google Calendar to Salesforce.

<div style="float:right; border:1px solid #ccc; padding:8px;">

EDITIONS

Available to manage from: both Salesforce Classic and Lightning Experience

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

</div>

IN THIS SECTION:

How Does Lightning Sync Sync My Sales Reps' Stuff?

Learn how Lightning Sync handles your reps' contacts and events when they're set up to use Lightning Sync.

Lightning Sync Considerations

Before you roll out Lightning Sync to your sales reps, familiarize yourself with these considerations.

Lightning Sync for Microsoft® Exchange

Help your sales reps keep their contacts and events in sync between your Microsoft® Exchange server and Salesforce without asking them to install and maintain software.

Lightning Sync for Google (Beta)

Help users keep their contacts and events in sync between their Google applications and Salesforce.

Manage Lightning Sync Users

After you've set up Lightning Sync, manage how your sales reps experience the feature and assist users in troubleshooting problems.

How Does Lightning Sync Sync My Sales Reps' Stuff?

Learn how Lightning Sync handles your reps' contacts and events when they're set up to use Lightning Sync.

<div style="float:right; border:1px solid #ccc; padding:8px;">

EDITIONS

Available to manage from: both Salesforce Classic and Lightning Experience

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

</div>

IN THIS SECTION:

Event Attendees Sync

Learn how and when Lightning Sync can sync event attendee details from sales reps' Microsoft® or Google Calendars™ to Salesforce.

Private Event Sync

Learn how private events sync from your sales reps' calendar applications to Salesforce when you've set up reps to use Lightning Sync.

Event Delete

You can set up sales reps to delete events—from both their calendar and Salesforce—in one action.

Event Attendees Sync

Learn how and when Lightning Sync can sync event attendee details from sales reps' Microsoft®
or Google Calendars™ to Salesforce.

That way, your whole sales team can see which prospects, customers, and coworkers are attending
their sales meetings directly from Salesforce. Team members can also see who's going to show,
because attendees' responses sync, too.

No additional setup is required to get event attendees to start syncing. Event attendee details sync
to Salesforce automatically when:

- The event organizer is set up to sync events with Lightning Sync.
- The event attendees' email addresses match contacts, leads, or user profiles in Salesforce.

Event attendee sync works through the event organizer. Your sales teams get the most from event
attendee sync when you set up event sync for all Salesforce users who meet together frequently. Otherwise, your teams could experience
event attendee sync limitations.

Limitations

If you set up an organizer to sync after attendees have already been syncing, sales teams could experience these limitations.

- Some event attendees aren't visible on events in Salesforce
- After resetting sync for an event attendee, that attendee could see some duplicate events in Salesforce

Private Event Sync

Learn how private events sync from your sales reps' calendar applications to Salesforce when you've
set up reps to use Lightning Sync.

Reps can prevent colleagues from viewing their events in Salesforce and in their calendar applications
by marking events as private.

Lightning Sync doesn't sync your reps' private events between systems unless you select to sync
events and select to enable `Sync Private Events` in a rep's Lightning Sync configuration.

After enabling, new and updated private events sync during the next sync cycle (usually sync cycles
occur every few minutes). Private events sync according to the filters you've determined in the rep's
configuration.

When private events start syncing, private event details are visible to reps' colleagues depending
on two factors: Which system events are viewed in, and how reps have set their calendar sharing settings in Salesforce.

In Salesforce, private event start and end times are visible to colleagues, but event details are hidden. All private event details are visible
to Salesforce administrators who can view, edit, and report on events. Reps can choose to share more private event details with their
colleagues by changing their calendar sharing level in their `Personal Settings`.

In your calendar application, private event details are shared with colleagues and supervisors as they always have been. Refer to that
calendar application documentation for more information.

If you decide to disable private event sync, your reps' private events don't sync during the next sync cycle, and do not sync again. A
version of each private event that was previously syncing remains in both Salesforce and the rep's calendar until the rep deletes one or
both.

> **⊘ Important:** Salesforce doesn't communicate to reps how their private events are set up to sync, nor does it communicate that you've changed the setting. It's important that you communicate which experience reps can expect so they can prepare their calendars accordingly. This practice can help keep reps comfortable with syncing their private events. It also guarantees that you keep Great Aunt Alberta's 95th birthday party out of Salesforce.

Event Delete

You can set up sales reps to delete events—from both their calendar and Salesforce—in one action.

You can set up reps to automatically delete syncing events in one action. Select this setting for reps from their Lightning Sync configurations.

Then reps can delete an event from their calendar application and Lightning Sync removes the event's counterpart in Salesforce automatically.

Because events sync only from reps' calendars to Salesforce, event delete only deletes both events in one action when reps delete events from their calendars. If a rep deletes an event from Salesforce, the event's counterpart remains in the rep's calendar.

Events that reps move out of their default calendar and into a secondary calendar are also deleted from Salesforce automatically.

Lightning Sync Considerations

Before you roll out Lightning Sync to your sales reps, familiarize yourself with these considerations.

IN THIS SECTION:

Considerations for Syncing Events

Before you roll out Lightning Sync to your sales reps, familiarize yourself with these considerations for syncing events. That way, your rollout generates no surprises.

Considerations for Companies With Multiple Salesforce Organizations

If your company uses Lightning Sync in multiple Salesforce organizations, make sure the data in those organizations remains separate by being mindful about how you set up your Lightning Sync configurations.

SEE ALSO:

Considerations for Migrating from Salesforce for Outlook to Lightning for Outlook and Lightning Sync

Considerations for Syncing Events

Before you roll out Lightning Sync to your sales reps, familiarize yourself with these considerations for syncing events. That way, your rollout generates no surprises.

Lightning Sync can sync your sales reps' events from their Microsoft® Exchange-based calendars or Google Calendars to Salesforce. You decided whether reps sync events by setting up the feature from Lightning Sync configurations in Salesforce Setup.

Keep in mind that there's potential for Lightning Sync to overwrite event data unless you're considerate about how you roll out the feature to your reps.

First, does one of these scenarios describe your rollout?

- You're migrating reps from Salesforce for Outlook
- Your reps edit their events records in Salesforce
- Your reps already have access to Lightning for Outlook (previously known as Salesforce App for Outlook)

For example, say that your rep maintains meeting notes in Salesforce event records. But the matching event in that rep's calendar doesn't include those notes. During the first sync, Lightning Sync overwrites the event in Salesforce with the one from the calendar.

You can prevent reps' events from being overwritten by following our guidelines for syncing events.

IN THIS SECTION:

Guidelines for Syncing Events
Before you roll out Lightning Sync, address these guidelines to avoid overwriting event data during certain sync scenarios.

Guidelines for Syncing Events

Before you roll out Lightning Sync, address these guidelines to avoid overwriting event data during certain sync scenarios.

If you fall into one of the sync scenarios outlined in Considerations for Syncing Events, follow these guidelines when you set up your reps for Lightning Sync.

- In Lightning Sync configurations, don't change the default setting, TODAY, for the event sync filter. That way, edits that your reps made to past events in Salesforce are excluded from the initial sync.
- Tell reps to edit event fields that sync (like date, time, subject, or description) in their calendars, and not in Salesforce. That way, Lightning Sync doesn't overwrite those edits in Salesforce. (Reps can continue to use Salesforce features that don't involve editing their Salesforce event fields, however, like relating events to Salesforce records.)

> **EDITIONS**
>
> Available to manage from:
> both Salesforce Classic and
> Lightning Experience
>
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> **Enterprise**, **Performance**,
> **Unlimited**, and **Developer**
> Editions

Considerations for Companies With Multiple Salesforce Organizations

If your company uses Lightning Sync in multiple Salesforce organizations, make sure the data in those organizations remains separate by being mindful about how you set up your Lightning Sync configurations.

You're using multiple organizations if you either:

- Test new features in a sandbox organization before setting up the feature in your live organization.
- Maintain separate Salesforce organizations for different divisions of your company.

To prevent Lightning Sync from syncing contacts and events between your Salesforce organizations, don't add the same user to Lightning Sync configurations in more than one organization.

We don't recommend marking a Lightning Sync configuration as inactive to prevent data from syncing between your Salesforce organizations. While marking a configuration as inactive prevents it from syncing a user's data, you risk forgetting that user is included in multiple Lightning Sync configurations, and marking the configuration as active later.

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> Editions

👁 **Example:** You're testing Lightning Sync features in your sandbox organization, so you add user Marianne Schumacher to anLightning Sync configuration in the sandbox organization. After you're satisfied with how you've set up Lightning Sync features for Marianne, you're ready to add her to a Lightning Sync configuration in your live organization.

Before you add Marianne to a Lightning Sync configuration in your live organization, remove her from the configuration in your sandbox organization. Otherwise, Lightning Sync can sync contacts and events between Marianne's email application, the sandbox organization, and the live organization, saving test and live data to all three data sources.

Lightning Sync for Microsoft® Exchange

Help your sales reps keep their contacts and events in sync between your Microsoft® Exchange server and Salesforce without asking them to install and maintain software.

When you set up users' contacts and events to sync between your company's Microsoft® Exchange server and Salesforce, you help your users increase their productivity. That's because there's no need for users to duplicate their work between the two systems. In addition, Lightning Sync offers users with compatible computing environments the flexibility to sync items whether working from their desks or from their mobile devices.

You define your users' Lightning Sync experience by selecting sync settings for users in Salesforce. You can set up users to sync contacts between Exchange and Salesforce in both directions, or just one. You can also set up users to sync events in one direction, from Exchange to Salesforce.
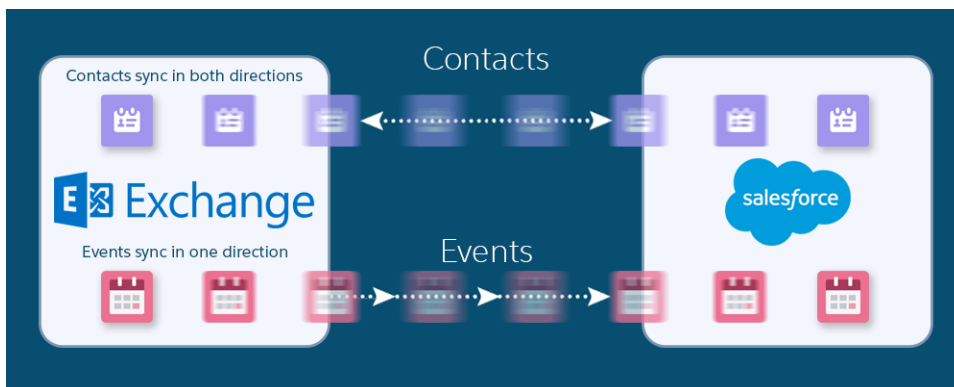
You can also decide how users' Exchange events sync to Salesforce. Set up users to sync all their events, or only the events they select.

Users select which Exchange events sync to Salesforce using Lightning for Outlook, a Microsoft integration feature that lets users experience Salesforce directly from Microsoft Outlook.
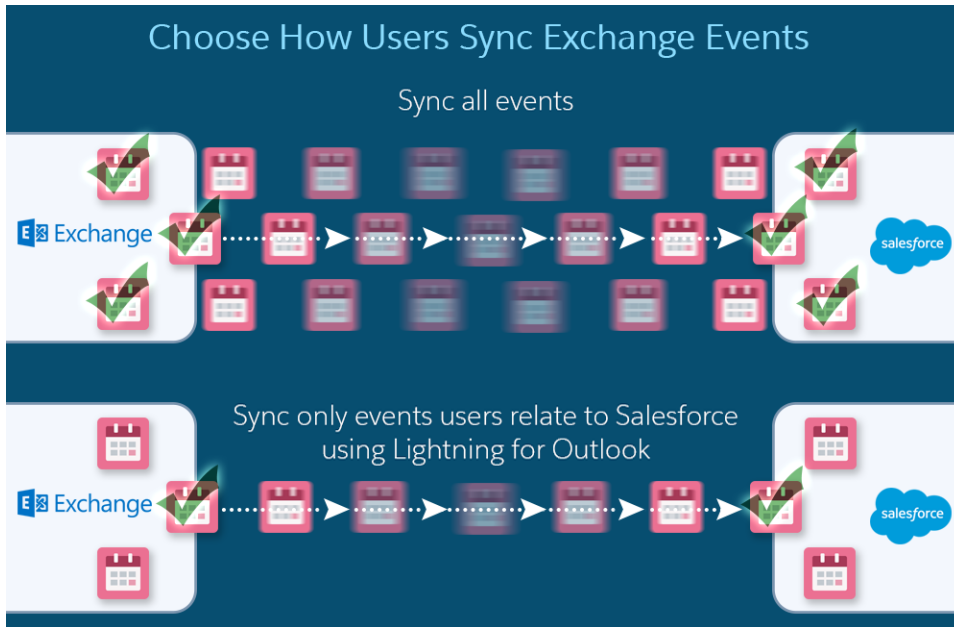
You can select more settings to define your users' sync experiences. For example, set up Lightning Sync to sync events your users mark as private. Or, to automatically remove events in Salesforce that your users delete from their calendars.

Lightning Sync for Microsoft Exchange Limitations

Currently, Lightning Sync doesn't:

- Sync events from Salesforce to Exchange
- Sync recurring events
- Delete syncing contacts in one action

Get Started with Lightning Sync for Microsoft Exchange

IN THIS SECTION:

Lightning Sync System Requirements for Microsoft® Exchange

Confirm that your Microsoft® Exchange-based server meets these system requirements before you set up your sales reps to sync contacts and events with Lightning Sync.

See the Big Picture for Setting Up Lightning Sync for Microsoft® Exchange

Set up Lightning Sync so your users can sync contacts and events between your company's Microsoft® Exchange server and Salesforce. You complete several steps to prepare the systems to communicate, both on your Exchange server and in Salesforce.

SEE ALSO:

Lightning for Outlook: Set Up Sales Reps to Experience Salesforce from Microsoft® Outlook®

Help Sales Reps Sync Contacts and Events with Lightning Sync (Admin Guide)

Sync Your Contacts and Events with Lightning Sync (User Guide)

Lightning Sync System Requirements for Microsoft® Exchange

Confirm that your Microsoft® Exchange-based server meets these system requirements before you set up your sales reps to sync contacts and events with Lightning Sync.

To connect to Salesforce using	Your company must be running either	With these settings enabled
An Exchange service account	• Office 365® Enterprise Editions with Exchange Online • Exchange Server 2016 • Exchange Server 2013 Service Pack 1	• Exchange Web Services (EWS) on an SSL connection • Exchange Autodiscover Service • Basic authentication on both your Exchange server and your Autodiscover service • Encryption protocol TLS 1.1 or later
OAuth 2.0 for Exchange	Office 365® Enterprise Editions with Exchange Online	No additional settings are required to connect using OAuth 2.0

See the Big Picture for Setting Up Lightning Sync for Microsoft® Exchange

Set up Lightning Sync so your users can sync contacts and events between your company's Microsoft® Exchange server and Salesforce. You complete several steps to prepare the systems to communicate, both on your Exchange server and in Salesforce.

Complete these steps to set up Lightning Sync for Microsoft Exchange.

IN THIS SECTION:

1. Choose and Configure Your Preferred Method for Connecting to Microsoft® Exchange
   Choose whether you'd like to connect Microsoft Exchange to Salesforce using an Exchange service account, or OAuth 2.0, and then set up that connection. Connecting using OAuth 2.0 requires a Microsoft Office 365 account.

2. Run the Lightning Sync Connection Test for Microsoft® Exchange Users
   Run the Lightning Sync connection test to confirm whether you and your IT pros have set up Lightning Sync successfully. Or, run the connection test if Lightning Sync was syncing your reps' items successfully, but suddenly stops.

3. Tell Sales Reps How to Prevent Certain Microsoft® Outlook Calendar Events from Syncing to Salesforce
   Tell your Lightning Sync users how to manage which of their Outlook calendar events sync with Salesforce. We recommend that sales reps prepare events that they don't want to sync before you kick off the sync process. However, reps can manage which events sync at anytime.

4. Define Sync Settings for Sales Reps Using Lightning Sync

   After sales reps prepare their Exchange events to sync with Salesforce, you can define sync settings for groups of reps in Lightning Sync configurations. This step kicks off the sync process for your reps.

5. Tell Sales Reps How to Sync Microsoft® Contacts with Salesforce

   Tell your Lightning Sync for Microsoft Exchange users that it's time to manage the Microsoft contacts that users want to sync with Salesforce.

SEE ALSO:

   Lightning Sync for Microsoft® Exchange

   Lightning Sync Success Community

Choose and Configure Your Preferred Method for Connecting to Microsoft® Exchange

Choose whether you'd like to connect Microsoft Exchange to Salesforce using an Exchange service account, or OAuth 2.0, and then set up that connection. Connecting using OAuth 2.0 requires a Microsoft Office 365 account.

IN THIS SECTION:

Connect Salesforce and Microsoft® Exchange Using an Exchange Service Account

To connect Salesforce to your company's Microsoft Exchange server using a service account, you and your Exchange administrator have to complete several steps, both from Salesforce and from your Exchange server.

Connect Salesforce and Microsoft® Exchange Using OAuth 2.0

Give Salesforce access to Microsoft Exchange Online using OAuth 2.0. To complete setup, you need a Microsoft Office 365® account and help from your Office 365 global administrator to provide credentials for your company's account.

EDITIONS

Available to manage from: both Salesforce Classic and Lightning Experience

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

Connect Salesforce and Microsoft® Exchange Using an Exchange Service Account

To connect Salesforce to your company's Microsoft Exchange server using a service account, you
and your Exchange administrator have to complete several steps, both from Salesforce and from
your Exchange server.

IN THIS SECTION:

1. Prepare Your Microsoft® Exchange Server for Lightning Sync

   The first step in setting up Lightning Sync is to enable several settings on your Exchange server,
   including Exchange Web Services, Exchange Autodiscover Service, and Basic authentication.

2. Set Up a Microsoft® Exchange Service Account to Communicate with Lightning Sync

   After you've enabled the right settings on your Exchange server, create an Exchange service
   account with impersonation rights for the mailbox of each Lightning Sync user.

3. Run the Microsoft® Remote Connectivity Analyzer with Lightning Sync Parameters

   Run the Remote Connectivity Analyzer—the free web-based tool provided by Microsoft—to
   confirm whether you and your Exchange administrator have set up Lightning Sync for Microsoft
   Exchange successfully. Or, run the Remote Connectivity Analyzer if Lightning Sync for Microsoft
   Exchange was syncing your reps' items successfully, but suddenly stops. Use the parameters
   provided to run the test for Lightning Sync.

4. Set Up Salesforce to Communicate with Microsoft® Exchange Using a Service Account

   After running the Remote Connectivity Analyzer, log in to Salesforce to enable Lightning Sync
   for Microsoft Exchange and provide your service account credentials.

Prepare Your Microsoft® Exchange Server for Lightning Sync

The first step in setting up Lightning Sync is to enable several settings on your Exchange server,
including Exchange Web Services, Exchange Autodiscover Service, and Basic authentication.

These instructions vary depending on the version of Microsoft® Exchange your company uses. For
more support, visit Microsoft's support website, search for the keywords mentioned here, and follow
the instructions intended for your Exchange version.

Complete the following steps on your Exchange server.

1. Enable Exchange Web Services (EWS) on an SSL connection.

   - Make sure your Exchange server has a signed certificate from one of the Salesforce-approved
     Certificate Authorities.

   - If your organization has configured a firewall, allow an inbound connection to your Exchange
     client access server on port 443.

2. Enable Exchange Autodiscover Service.

3. Enable Basic authentication on both your Exchange server and your Autodiscover service. If you need to run additional authentication
   methods (such as Microsoft NTLM), there is no need to disable those methods; you can run Lightning Sync without conflict.

Set Up a Microsoft® Exchange Service Account to Communicate with Lightning Sync

After you've enabled the right settings on your Exchange server, create an Exchange service account with impersonation rights for the mailbox of each Lightning Sync user.

Before setting up an Exchange Service account, make sure you've enabled the appropriate Exchange server settings to set up Lightning Sync.

To set up an Exchange service account, work with your Exchange admin to complete these steps on your Exchange server.

Watch a Demo:

- ▶ Set Up a Microsoft® Exchange Service Account to Sync with Salesforce (for administrators using Office 365™ Admin Center)

- ▶ Set Up a Microsoft® Exchange Service Account to Sync with Salesforce (for administrators using command shell)

> 📝 Note: For more support, visit Microsoft®'s support website, search for the keywords mentioned here, and follow the instructions intended for your Exchange version.

1. Create an Exchange user with a mailbox that acts as the service account. You use this email address later to configure Exchange impersonation for the service account.

2. Using Exchange Management Shell, enter the commands that enable service account impersonation for your version of Exchange. If you receive a pipeline error message, wait a few minutes and reenter the command to let your server process the requests.

   - If you're using Exchange 2013:

   a. Enable the Active Directory extended permission for `ms-Exch-EPI-Impersonation` on all Client Access servers.

   ```
   Get-ExchangeServer | where {$_.IsClientAccessServer -eq $TRUE} | ForEach-Object
   {Add-ADPermission -Identity $_.distinguishedname -User (Get-User -Identity
   <EnterExchangeSyncServiceAccountEmailAddress> | select-object).identity
   -extendedRight ms-Exch-EPI-Impersonation}
   ```

   b. Enable the Active Directory extended rights for `ms-Exch-EPI-May-Impersonate` to let your service account impersonate all accounts on your Exchange server. Set a filter later that lets you limit the users the service account syncs with Salesforce.

   ```
   Get-MailboxDatabase | ForEach-Object {Add-ADPermission -Identity $_.distinguishedname
    -User <EnterExchangeSyncServiceAccountAddress> -ExtendedRights
   ms-Exch-EPI-May-Impersonate}
   ```

   - If you're using Exchange Online offered by Microsoft Office 365™:

   a. Enable customization on your Exchange server.

   ```
   Enable-OrganizationCustomization
   ```

3. Using Exchange Management Shell, enter these commands to configure your service account to impersonate the group of users who'll sync with Lightning Sync.

   a. Create a management scope to define a filter that groups the Exchange users who sync with Lightning Sync. For example, if you want only sales reps to sync, and their Exchange mailboxes all have the same value `Sales` for the filterable property `Department`, enter `Department -eq 'Sales'` in place of `<ChooseRecipientFilter>`.

   ```
   New-ManagementScope -Name:<ChooseExchangeSyncScopeName>
   -RecipientRestrictionFilter:{<ChooseRecipientFilter>}
   ```

b. Create a management role assignment that restricts the service account to impersonate only the users you defined in the management scope.

```
New-ManagementRoleAssignment -Name:<ChooseExchangeSyncRoleAssignmentName>
-Role:ApplicationImpersonation -User:<EnterExchangeSyncServiceAccountAddress>
-CustomRecipientWriteScope:<EnterExchangeSyncScopeName>
```

Run the Microsoft® Remote Connectivity Analyzer with Lightning Sync Parameters

Run the Remote Connectivity Analyzer—the free web-based tool provided by Microsoft—to confirm whether you and your Exchange administrator have set up Lightning Sync for Microsoft Exchange successfully. Or, run the Remote Connectivity Analyzer if Lightning Sync for Microsoft Exchange was syncing your reps' items successfully, but suddenly stops. Use the parameters provided to run the test for Lightning Sync.

Before you run the Remote Connectivity Analyzer, make sure that you've selected your preferred connection method so that Exchange and Salesforce can communicate. Wait a few minutes after completing those tasks to let your Exchange server process the changes you've made. Otherwise, the Remote Connectivity Analyzer can show a failed test summary, even though you've configured setup correctly.

The Remote Connectivity Analyzer checks several points of connectivity between your Salesforce organization and your Exchange server. When the test is complete, Microsoft provides a summary describing your connection status.

> Note: The Microsoft Remote Connectivity Test and the Lightning Sync Connection Test check general connectivity between your email server and your Salesforce organization. If you want to test connectivity for only one (or a few) of your reps, check their sync statuses from `Lightning Sync Status` in Setup.

1. Visit Microsoft's website and search for the Remote Connectivity Analyzer.

2. On the `Exchange Server` tab, select **Service Account Access (Developers)**.

3. Click **Next**.

4. Complete the test fields:

For this test field	Type this parameter
`Target mailbox email address`	The email address of a sales rep you've set up to be impersonated by your Lightning Sync service account
`Service Account User Name (Domain\User Name or UPN)`	The service account domain\user name or UPN you've set up for Lightning Sync
`Service Account Password`	The service account password you've set up for Lightning Sync

5. Select `Use Autodiscover to detect server settings.`

6. Select `Test predefined folder.`

7. Choose `Contacts` if you'd like to test sync connectivity for this user's contacts, or `Calendar` for this user's events.

8. Check `Use Exchange Impersonation.`

9. In the `Impersonated User` field, type the same Exchange email address you specified for `Target mailbox email address.`

10. For `Impersonated user identifier`, select `SMTP Address`.

11. Check the `I understand that I must use the credentials of a working account...`
acknowledgment.

12. Type the analyzer verification code and click **verify**.

13. At the top of the page, click **Perform Test**.
Running the test usually takes less than 30 seconds. When the test is complete, the analyzer displays a summary evaluating the sync
connectivity for the Exchange user you've specified.

14. Take action based on the test results.

- If the test summary displays "Connectivity Test Successful" or "Connectivity Test Successful with Warnings," it's likely that you've
  set up your service account correctly. and you're ready to provide your service account credentials to Salesforce.

- If the test summary displays "Connectivity Test Failed," review the test details to troubleshoot setup issues. If the test continues
  to fail, verify that you've completed the previous setup steps correctly and then contact Salesforce Customer Support for help.

SEE ALSO:

Set Up Salesforce to Communicate with Microsoft® Exchange Using a Service Account

After running the Remote Connectivity Analyzer, log in to Salesforce to enable Lightning Sync for
Microsoft Exchange and provide your service account credentials.

1. From Salesforce Setup, enter `Lightning Sync Setup` in the `Quick Find` box, then
select **Lightning Sync Setup**.

2. Under Enable Lightning Sync, click **Edit**.

3. Check `Enable Lightning Sync` and click **Save**.

4. Enter the service account user name you created in Exchange, including your company's domain
and top-level domain. For example, if you work for AW Computing, and the service account
mailbox you've created is `svcacct@awcomputing.com`, enter your user name in either
of these formats:

- `svcacct@awcomputing.com`

- `awcomputing.com\svcacct`

Some network configurations require one format rather than the other. If your first attempt to
get Salesforce and Exchange to communicate is unsuccessful, try the other format.

5. Enter your service account password.

6. If your sales reps' email domains are different than your service account domain, enter the additional domains in a comma-separated
list. For example, if your service account is `svcacct@awcomputing.com`, but your reps' email addresses are in the domain
`awcomputing.net`, enter `awcomputing.net` as an additional domain so Lightning Sync can recognize it.

7. Click **Save**.

EDITIONS

Available to manage from:
both Salesforce Classic and
Lightning Experience

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

USER PERMISSIONS

To access Lightning Sync
setup in Salesforce:
- "View Setup and
  Configuration"

Connect Salesforce and Microsoft® Exchange Using OAuth 2.0

Give Salesforce access to Microsoft Exchange Online using OAuth 2.0. To complete setup, you need
a Microsoft Office 365® account and help from your Office 365 global administrator to provide
credentials for your company's account.

1. From Setup, enter `Lightning Sync Setup` in the `Quick Find` box, then select
   Lightning Sync Setup.

2. Enable Lightning Sync.

3. Select **OAuth 2.0 for Microsoft Exchange** as your preferred connection method.

4. Under Accept and Enable Access to Your Server, have your Office 365 global administrator log
   in to your Office 365 account.

5. When the Microsoft Azure™ login page opens, accept Lightning Sync access to your account
   by following the prompts until you're directed back to Salesforce.

6. From Salesforce, under Accept and Enable Access to Your Server, enable OAuth 2.0.

Run the Lightning Sync Connection Test for Microsoft® Exchange Users

Run the Lightning Sync connection test to confirm whether you and your IT pros have set up
Lightning Sync successfully. Or, run the connection test if Lightning Sync was syncing your reps'
items successfully, but suddenly stops.

After taking the necessary steps to prepare your Microsoft Exchange server and Salesforce to sync,
you're ready to run the Lightning Sync connection test.

The Lightning Sync connection test checks several points of connectivity between Salesforce and
your email server. When the test is complete, it provides a summary describing your connection
status.

Lightning Sync for Microsoft® Exchange users should run both the Lightning Sync connection test
and the Microsoft Remote Connectivity Analyzer to test connectivity. The tests differ slightly, so
running both gives you more information about your connection status. Lightning Sync for Google
users need only run the Lightning Sync connection test.

The Microsoft Remote Connectivity Test and the Lightning Sync Connection Test check general
connectivity between your email server and your Salesforce organization. If you want to test
connectivity for only one (or a few) of your reps, check their sync statuses from `Lightning
Sync Status` in Setup.

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

2. From the `Connection Test` section, provide the email address for one of the reps you've set up to sync on your email server.

3. Click **Test**.

Lightning Sync checks the connection between Salesforce and your email server and summarizes your connection status.

SEE ALSO:

Check Lightning Sync Users' Sync Statuses

Run the Microsoft® Remote Connectivity Analyzer with Lightning Sync Parameters

Tell Sales Reps How to Prevent Certain Microsoft® Outlook Calendar Events from Syncing to Salesforce

Tell your Lightning Sync users how to manage which of their Outlook calendar events sync with Salesforce. We recommend that sales reps prepare events that they don't want to sync before you kick off the sync process. However, reps can manage which events sync at anytime.

Sales reps can prevent some of their calendar events —like personal events—from syncing to Salesforce.

Later in the setup process, you have to define reps' sync settings in Lightning Sync configurations. If you define sync settings for events, all events from a rep's default calendar sync to Salesforce—unless you tell reps to manage those events now.

Reps can prevent personal events from syncing from their calendars to Salesforce in different ways.

- Reps can create a separate calendar in their calendar application to track personal events. (Lightning Sync is designed to sync only a reps' default calendar to Salesforce.)

- When you define sync settings in Lightning Sync configurations, you choose whether you want to sync reps' private events. If you opt not to sync private events, reps can prevent events from syncing by assigning the private option to events from their calendar applications.

If users don't manage their personal events before syncing begins, users can still remove those events from Salesforce by deleting personal events Salesforce manually.

EDITIONS

Available to manage from: both Salesforce Classic and Lightning Experience

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

Define Sync Settings for Sales Reps Using Lightning Sync

After sales reps prepare their Exchange events to sync with Salesforce, you can define sync settings for groups of reps in Lightning Sync configurations. This step kicks off the sync process for your reps.

Before you begin, make sure that you understand how to avoid syncing data between Salesforce organizations. Syncing data between Salesforceorganizations is possible if you test Lightning Sync before rolling it out to reps, or your company uses multiple Salesforce orgs.

Defining sync settings lets you control which of your users can sync contacts and events. You can also control which direction your users sync, and create filters to limit certain records from syncing.

1. From Salesforce Setup, enter `Sync Configurations` in the `Quick Find` box, then select **Sync Configurations**.

2. Click **New Lightning Sync Configuration**.
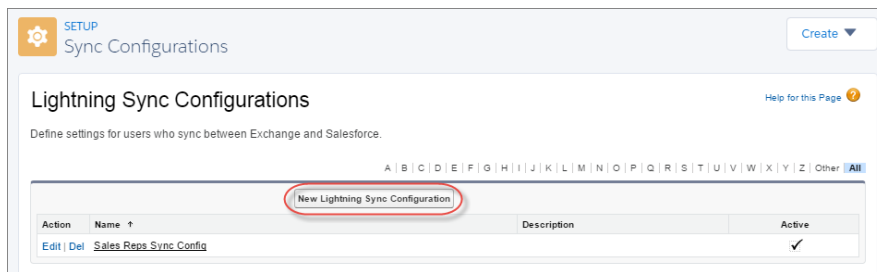
3. Enter the name of the configuration. For example, if you're creating a configuration for users in a particular region, enter a unique name for it, and then select `Active`.

4. Assign users and profiles to this configuration.

5. Indicate the sync direction for your users' contacts.

6. To change field mappings between Salesforce and Exchange contacts, click **Edit Field Mappings**.

7. Indicate whether you'd like to sync your users' events from Exchange to Salesforce.

8. Indicate whether you want all Exchange events to sync to Salesforce, or only the events your users select. If you set up users to select events, events users relate to Salesforce from Lightning for Outlook begin to sync between the two systems. To finish setting up that option, you're required to enable Lightning for Outlook, and your users are required to complete Lightning for Outlook setup.

9. To change field mappings between Salesforce and Exchange events, click **Edit Field Mappings**.

10. Click **Save**.

11. Set filters to specify the contacts users can sync from Salesforce to Exchange. You are required to set filters based on your users' record ownership. Choose whether you want to:

- Limit contacts that users sync to only what users own, choose **Selected Contacts**, and then select **User's Records**. Make sure that you select both of these settings together, or no contacts sync for users in this configuration.

- Let users sync all contacts they can see in Salesforce, choose **All Contacts**.

Set more sync filters, if you wish. For example, to prevent contacts from outside your users' territories from syncing, create sync filters for specific fields on users' contact records. Contact filters don't apply to contacts syncing from Exchange to Salesforce.

Filter By Additional Objects and Fields (Optional)

Object	Field	Operator	Value	
Contact	Mailing Country	not equal to	United States	AND
Contact	Mailing Country	not equal to	Japan	AND
--None--	--None--	--None--		AND
--None--	--None--	--None--		AND
--None--	--None--	--None--		AND

Add Row Remove Row

Other Contacts to Include

☐ Sync contacts users follow in Chatter

12. Select `Sync private events` to sync events your users have marked private either in Salesforce or their calendars.

13. Select `Automatically remove deleted Exchange events from Salesforce` to let reps delete Exchange events and Salesforce events in one action.

14. Select `Automatically relate Google events to Salesforce records` to let Lightning Sync review reps' calendars and intelligently relate important events to the appropriate Salesforce contacts or leads automatically.

15. Specify the specific events users can sync from Exchange to Salesforce. Enter a filter in the `Greater or equal to` field. Doing so limits the events users can sync to these time frames.

- *TODAY*—Syncs events that end on or after today. The start time is 12:00 a.m. Learn more on page 384 about why this selection is recommended in certain scenarios.

- *LAST MONTH*—Syncs events that ended on or after the first day of last month.

- *LAST N DAYS*—Syncs events that ended on or after a specified number of days ago, such as *LAST 30 DAYS*. You can sync events that ended up to 180 days ago.

16. Click **Save**.

Contact and event syncing has begun for users in this Lightning Sync configuration.

SEE ALSO:

> How Lightning Sync Manages Sync Conflicts with Salesforce for Outlook
>
> Considerations for Companies With Multiple Salesforce Organizations

Tell Sales Reps How to Sync Microsoft® Contacts with Salesforce

Tell your Lightning Sync for Microsoft Exchange users that it's time to manage the Microsoft contacts that users want to sync with Salesforce.

If you've set up sales reps to sync contacts from only Salesforce to Microsoft Exchange, you can skip this step: Reps' contacts and events are already syncing.

Reps set up to sync contacts from Exchange to Salesforce or sync both ways can kick off sync by choosing which Microsoft contacts sync to Salesforce.

After you define reps' sync settings by adding them to active Lightning Sync configurations, Lightning Sync creates a folder called Salesforce_Sync within each reps' email account. Lightning Sync nests Salesforce_Sync within reps' Contacts directories.

Reps choose which contacts sync by moving those contacts into the Salesforce_Sync folder. When reps can see and access the Salesforce_Sync folder in their email application, they can start moving contacts into it.

EDITIONS

Available to manage from: both Salesforce Classic and Lightning Experience

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

Lightning Sync for Google (Beta)

Help users keep their contacts and events in sync between their Google applications and Salesforce.

> **Note:** This release contains a beta version of Lightning Sync for Google, which means it's a high-quality feature with known limitations. Lightning Sync for Google isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Lightning Sync for Google in the Lightning Sync Success Community.

When you set up sales reps' contacts and events to sync between their Google applications and Salesforce, you help reps increase their productivity. That's because there's no need for reps to duplicate their work between the two applications. In addition, Lightning Sync offers reps the flexibility to sync items whether working from their desks or from their mobile devices.

You define your reps' Lightning Sync experience by selecting sync settings for reps in Salesforce. For example, you can set up Lightning Sync to sync your reps' contacts from Salesforce to Google Contacts (which reps can access from their Gmail™). You can also set up reps' events to sync from Google Calendar™ to Salesforce.
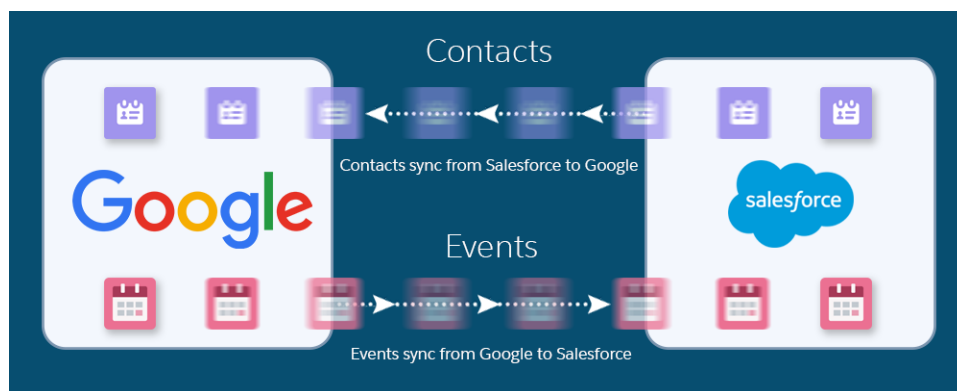
Lightning Sync for Google Limitations

Keep in mind that for now, Lightning Sync for Google doesn't:

- Sync contacts from Google Contacts to Salesforce
- Sync events from Salesforce to Google Calendar
- Sync recurring events
- Sync Available or Busy status on events
- Let you edit which Google contact and event fields map to Salesforce contact and events fields

Get Started with Lightning Sync for Google

IN THIS SECTION:

See the Big Picture for Setting Up Lightning Sync for Google (Beta)

Set up Lightning Sync so sales reps can sync contacts and events between your company's Google for Work account and Salesforce.
You complete several steps to prepare the systems to communicate, both from your Google account and from Salesforce.

See the Big Picture for Setting Up Lightning Sync for Google (Beta)

Set up Lightning Sync so sales reps can sync contacts and events between your company's Google
for Work account and Salesforce. You complete several steps to prepare the systems to communicate,
both from your Google account and from Salesforce.

> 📝 **Note:** This release contains a beta version of Lightning Sync for Google, which means it's a
> high-quality feature with known limitations. Lightning Sync for Google isn't generally available
> unless or until Salesforce announces its general availability in documentation or in press
> releases or public statements. We can't guarantee general availability within any particular
> time frame or at all. Make your purchase decisions only on the basis of generally available
> products and features. You can provide feedback and suggestions for Lightning Sync for
> Google in the Lightning Sync Success Community.

Complete these steps to set up Lightning Sync for Google.

IN THIS SECTION:

1. Prepare Your Google for Work Account for Lightning Sync

   Get help from the IT pros or Google administrator at your company to prepare Google servers
   to communicate with Salesforce. Your Google admin can complete these steps by logging in
   to your company's Google API Console and Google Admin Console.

2. Prepare Salesforce for Lightning Sync

   After an IT pro or Google administrator has prepared your Google for Work account for Lightning
   Sync, complete the necessary steps to prepare Salesforce, too. From Salesforce, first register the
   Google API site. Then, select settings to connect the applications using OAuth 2.0 for Google.

3. Run the Lightning Sync Connection Test for Google Users

   Run the Lightning Sync connection test to confirm whether you and your IT pros have set up
   Lightning Sync successfully. Or, run the connection test if Lightning Sync was syncing your reps' items successfully, but suddenly
   stops.

4. Tell Sales Reps How to Prevent Certain Google Calendar Events from Syncing to Salesforce

   Tell your Lightning Sync users how to manage which of their calendar events sync with Salesforce. We recommend that sales reps
   prepare events that they don't want to sync before you kick off the sync process. However, reps can manage which events sync at
   anytime.

5. Define Sync Settings for Sales Reps Using Lightning Sync for Google

   Define sync settings for groups of reps in Lightning Sync configurations. This step kicks off the sync process for your reps, and
   determines how their contacts and events sync between the two systems.

EDITIONS

Available to manage from:
both Salesforce Classic and
Lightning Experience

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

USER PERMISSIONS

To prepare your Google for
Work account to
communicate with
Salesforce:

- The Owner role on your
  company's Google for
  Work account, which
  gives you administrative
  permissions

To access and edit Lightning
Sync Setup

- "Customize Application"

Prepare Your Google for Work Account for Lightning Sync

Get help from the IT pros or Google administrator at your company to prepare Google servers to communicate with Salesforce. Your Google admin can complete these steps by logging in to your company's Google API Console and Google Admin Console.

For more support, refer to Google developer documentation.

1. Complete these steps from Google API Console.

   a. Create a Google project dedicated to Lightning Sync.

   b. From the new project, to set up reps to sync events, enable Google Calendar™ API.

   c. From the new project, to set up reps to sync contacts, enable Google Contacts API.

   d. Create credentials for a service account with the role `Project Owner` and the key type `JSON`.

   e. Enable `Domain-Wide Delegation` for the service account. Doing so generates a Client ID (also known as Client name) for the service account, which you need later.

   f. Save the JSON private key from your service account in a secure location and share it with your Salesforce admin. (But only your Salesforce admin.)

      🛑 Important: Let's consider your private key the "key to the Google Calendar castle." People in possession of the key have access to your company's Google account. Therefore, only share the key with team members who need it, and share it via secure pathways. For example, emailing your key probably isn't a good idea.

2. Complete these steps from Google Admin Console.

   a. Navigate to your security settings, select the advanced section, and click **Manage API client access**.

   b. Authorize read-only calendar scope for the service account by entering the service account Client ID (also known as Client name) you generated in Google API Console. Enter the scope:

   `https://www.googleapis.com/auth/calendar.readonly`

   If you like, you can authorize other scopes, but this scope is required.

      💡 Tip: If you didn't retain your Client ID (also known as Client name) from Google API Console, you can locate it within your service account private key.

   c. Authorize read-only contact scope for the service account by entering the service account Client ID (also known as Client name) you generated in Google API Console. Enter these scopes:

   `https://www.googleapis.com/auth/contacts.readonly` and `https://www.google.com/m8/feeds`

   If you like, you can authorize other scopes, but this scope is required.

When you're finished, your Salesforce admin can take the next steps by preparing Salesforce for Lightning Sync.

Prepare Salesforce for Lightning Sync

After an IT pro or Google administrator has prepared your Google for Work account for Lightning Sync, complete the necessary steps to prepare Salesforce, too. From Salesforce, first register the Google API site. Then, select settings to connect the applications using OAuth 2.0 for Google.

Before preparing Salesforce for Lightning Sync, make sure that you've taken the necessary steps to prepare your company's Google for Work account to communicate with Salesforce.

1. From Salesforce Setup, Register a new remote site for `https://www.googleapis.com`. Don't disable protocol security for the site, or Salesforce can't connect with Google.

2. From Salesforce Setup, enter `Lightning Sync Setup` in the `Quick Find` box, then select **Lightning Sync Setup**.

3. Enable Lightning Sync.

4. Select **OAuth 2.0 for Google (Beta)** as your preferred connection method.

5. Upload the private key for your Google service account. Your Google admin generated the key when setting up the service account for Lightning Sync.

   > 🛑 **Important:** Let's consider your private key the "key to the Google Calendar castle." People in possession of the key have access to your company's Google account. Therefore, only share the key with team members who need it, and share it via secure pathways. For example, emailing your key probably isn't a good idea.

6. Click **Save**.

When you're finished, run the Lightning Sync connection test to make sure that you've set up your connection correctly.

Run the Lightning Sync Connection Test for Google Users

Run the Lightning Sync connection test to confirm whether you and your IT pros have set up Lightning Sync successfully. Or, run the connection test if Lightning Sync was syncing your reps' items successfully, but suddenly stops.

After taking the necessary steps to prepare your Google for Work account and Salesforce to sync, you're ready to run the Lightning Sync connection test.

The Lightning Sync connection test checks several points of connectivity between Salesforce and your email server. When the test is complete, it provides a summary describing your connection status.

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

2. From the `Connection Test` section, provide the email address for one of the reps you've set up to sync on your email server.

3. Click **Test**.
   Lightning Sync checks the connection between Salesforce and your email server and summarizes your connection status.

Tell Sales Reps How to Prevent Certain Google Calendar Events from Syncing to Salesforce

Tell your Lightning Sync users how to manage which of their calendar events sync with Salesforce. We recommend that sales reps prepare events that they don't want to sync before you kick off the sync process. However, reps can manage which events sync at anytime.

Sales reps can prevent some of their calendar events —like personal events—from syncing to Salesforce.

Later in the setup process, you have to define reps' sync settings in Lightning Sync configurations. If you define sync settings for events, all events from a rep's default calendar sync to Salesforce—unless you tell reps to manage those events now.

Reps can prevent personal events from syncing from their calendars to Salesforce in different ways.

- Reps can create a separate calendar in their calendar application to track personal events. (Lightning Sync is designed to sync only a reps' default calendar to Salesforce.)

- When you define sync settings in Lightning Sync configurations, you choose whether you want to sync reps' private events. If you opt not to sync private events, reps can prevent events from syncing by assigning the private option to events from their calendar applications.

If users don't manage their personal events before syncing begins, users can still remove those events from Salesforce by deleting personal events Salesforce manually.

Define Sync Settings for Sales Reps Using Lightning Sync for Google

Define sync settings for groups of reps in Lightning Sync configurations. This step kicks off the sync process for your reps, and determines how their contacts and events sync between the two systems.

Before you begin, make sure that you understand how to avoid syncing data between Salesforce organizations. Syncing data between Salesforce organizations is possible if you test Lightning Sync before rolling it out to reps, or your company uses multiple Salesforce orgs.

Defining sync settings lets you manage how your sales reps sync. You can:

- Define which sales reps sync
- Define whether contacts, events, or both items sync
- Create filters to limit certain contacts or events from syncing
- Define whether users' private events sync
- Define whether events reps delete in their Google calendars are automatically removed from Salesforce, too
- Define whether important events are automatically related to the appropriate Salesforce contacts or leads

Make sure you've had your reps prepare their Google Calendar™ events to sync with Salesforce before you define sync settings. It's easier for reps to manage events before sync starts than to remove syncing items from Salesforce later. Reps don't have to prepare their contacts; Because contacts sync from Salesforce to Google Contacts, the contact filters you create in sync configurations control that.

Follow these steps to define your reps' Lightning Sync for Google settings.

1. From Salesforce Setup, enter `Sync Configurations` in the `Quick Find` box, then select **Sync Configurations**.

2. Click **New Lightning Sync Configuration**.

3. Enter the name of the configuration. For example, if you're creating a configuration for reps in a particular region, enter a unique name, and then select `Active`.

Basic Information

Name	Sales Reps Europe
Active	☑
Description	Sync settings for sales reps in Europe

4. Assign reps and profiles to this configuration.

Assign Users and Profiles

Select users for this configuration.

Search: Users ▾ for: [   ] [Find]

| Available Members | | Assigned Members |
| User: Gordon Nodrog | Add ▶ ◀ Remove | User: Celia Kung
User: Johannes Kienzle
User: Lance Santin |

5. Indicate that you'd like to sync your reps' contacts from Salesforce to Google, and select your preferred matching behavior.

Data Settings

Contacts

Sync Direction
Salesforce to Google ▾

Conflict Behavior
Salesforce always wins

If a Google contact matches multiple Salesforce contacts, sync it with the Salesforce contact that:

- ⦿ Has the most recent activity [i]
- ○ Was last updated
- ○ Has the oldest creation date

6. Indicate that you'd like to sync your reps' events from Google Calendar to Salesforce.

Events

Sync Direction
Google to Salesforce ▾

Conflict Behavior
Google always wins

7. Click **Save**.

8. Set filters to specify the contacts reps can sync from Salesforce to Google. You are required to set filters based on your reps' record ownership. Choose whether you want to:

- Limit contacts that users sync to only what reps own, choose **Selected Contacts**, and then select **User's Records**. Make sure that you select both of these settings together, or no contacts sync for users in this configuration.

- Let reps sync all contacts they can see in Salesforce, choose **All Contacts**.

Set more sync filters, if you wish. For example, to prevent contacts from outside your reps' territories from syncing, create sync filters

for specific fields on reps' contact records.

9. Select `Sync private events` to sync events your reps have marked as private in their Google calendars.

10. Select `Automatically remove deleted Google events from Salesforce` to let reps delete Google events and Salesforce events in one action.

11. Select `Automatically relate Google events to Salesforce records` to relate important events to the appropriate Salesforce contacts or lead automatically.

12. Specify the specific events reps can sync from Google to Salesforce. Enter a filter in the `Greater or equal to` field. Doing so limits the events reps can sync to these time frames.

- `TODAY`—Syncs events that end on or after today. The start time is 12:00 a.m. Learn more on page 384 about why this selection is recommended in certain scenarios.

- `LAST MONTH`—Syncs events that ended on or after the first day of last month.

- `LAST N DAYS`—Syncs events that ended on or after a specified number of days ago, such as `LAST 30 DAYS`. You can sync events that ended up to 180 days ago.

13. Click **Save**.

Syncing has begun for reps in this Lightning Sync configuration.

Manage Lightning Sync Users

After you've set up Lightning Sync, manage how your sales reps experience the feature and assist users in troubleshooting problems.

IN THIS SECTION:

Assign Users to Lightning Sync Configurations

To get your Lightning Sync users' contacts or events to sync, assign users to a Lightning Sync configuration. You can assign individual users or add user profiles to assign multiple users.

Fix Sync Issues for Lightning Sync Users

If an Lightning Sync user has trouble syncing between your email server and Salesforce, you can troubleshoot sync issues by checking your users' sync statuses or running a Lightning Sync error report. If you find a sync issue that a user can't overcome, then you can reset that user's sync process for them.

Assign Users to Lightning Sync Configurations

To get your Lightning Sync users' contacts or events to sync, assign users to a Lightning Sync configuration. You can assign individual users or add user profiles to assign multiple users.

Before you assign a user to a Lightning Sync configuration, consider how that user's records sync if they're already mentioned in another configuration:

- If you assign an individual user to two Lightning Sync configurations, the user is removed from the first configuration automatically and assigned to the new one.

- If you assign a user to two Lightning Sync configurations as both an individual user and as part of a profile, the user is not removed from either configuration, but the user's records will sync according to the configuration that lists the user individually.

- If you assign a user to one Lightning Sync configuration and one configuration, the user is not removed from either configuration, but the user's records will sync according to the Lightning Sync configuration.

Users observe the assignments you've created, added, or removed the next time Lightning Sync runs a sync cycle.

To assign a user to a Lightning Sync configuration,

1. From Setup, enter `Lightning Sync Configurations` in the `Quick Find` box, then select **Lightning Sync Configurations**.

2. If you're modifying a Lightning Sync configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Lightning Sync Configuration**, and then complete the required fields.

3. In the Assign Users and Profiles section, select either `Profiles` or `Users` in the `Search` drop-down list.

4. If you don't see the member you want to add, enter keywords in the search box and click **Find**.

5. Select members from the Available Members box, and click **Add** to add them to the group. If all available users are assigned to this configuration, the Users list is empty and you can only assign profiles.

6. To remove members, select those members and click **Remove**.

7. Click **Save**.

SEE ALSO:

How Lightning Sync Manages Sync Conflicts with Salesforce for Outlook

Considerations for Companies With Multiple Salesforce Organizations

Fix Sync Issues for Lightning Sync Users

If an Lightning Sync user has trouble syncing between your email server and Salesforce, you can troubleshoot sync issues by checking your users' sync statuses or running a Lightning Sync error report. If you find a sync issue that a user can't overcome, then you can reset that user's sync process for them.

IN THIS SECTION:

Check Lightning Sync Users' Sync Statuses

If your users can't sync, you can check their sync statuses—and the sync status of your Lightning Sync setup—to troubleshoot the problem.

Build and Run a Lightning Sync Error Report

If your Lightning Sync users can't sync, you can build and run an error report to discover what's causing sync to fail in your organization, and for which users. The report details provide suggestions to help you troubleshoot sync issues.

Reset Sync for Lightning Sync Users

If a sales rep has trouble syncing between your email server and Salesforce, you can reset that rep's sync process. Resetting sync clears out and then restores the connections between a rep's email and calendar applications and Salesforce records. Resetting the sync process doesn't affect information stored in those records.

Test Your Connection Between Your Email and Calendar Server and Salesforce

Lightning Sync for Microsoft® Exchange users should run both the Lightning Sync connection test and the Microsoft Remote Connectivity Analyzer to test connectivity. The tests differ slightly, so running both gives you more information about your connection status. Lightning Sync for Google users need only run the Lightning Sync connection test.

Lightning Sync for Microsoft® Exchange Statuses

Understanding Lightning Sync for Microsoft Exchange statuses helps you assess and address Lightning Sync errors that appear on the Lightning Sync status page in Salesforce.

EDITIONS

Available to manage from: both Salesforce Classic and Lightning Experience

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

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Check Lightning Sync Users' Sync Statuses

If your users can't sync, you can check their sync statuses—and the sync status of your Lightning Sync setup—to troubleshoot the problem.

1. From Setup, enter `Lightning Sync Status` in the `Quick Find` box, then select **Lightning Sync Status**.

2. Type the name of the user whose sync status you'd like to check, and click **Check Status**. The sync status for that user is displayed.

In some cases, you may need to reset sync for a user.

If you need help interpreting sync statuses, or need recommendations on correcting sync issues, check out Lightning Sync for Microsoft® Exchange Statuses.

SEE ALSO:

   Build and Run a Lightning Sync Error Report

   Reset Sync for Lightning Sync Users

Build and Run a Lightning Sync Error Report

If your Lightning Sync users can't sync, you can build and run an error report to discover what's causing sync to fail in your organization, and for which users. The report details provide suggestions to help you troubleshoot sync issues.

First, you create a custom report type using a Lightning Sync Error Report custom object we've set up for you in Salesforce. Then create a Lightning Sync error report. Finally, run your report to help your users fix those pesky sync errors they're experiencing.

1. Create a custom report type. Set the `Primary Object` to **Lightning SyncError**.

2. Create your Lightning Sync error report. From the Reports tab, click **New Report**. Set the `Report Type` to the Lightning Sync report type you created in step 1, and click **Create**.

3. Save and run your Lightning Sync error report. From the unsaved report, click **Save**, complete the required fields, and click **Save and Run Report**.
   Salesforce generates a list of errors sync errors found in your organization, or displays "Grand Totals (0 records)" if the report couldn't identify any sync errors.

If the report couldn't identify any errors, but users still can't sync, contact Salesforce.

SEE ALSO:

   Lightning Sync for Microsoft® Exchange Statuses

Reset Sync for Lightning Sync Users

If a sales rep has trouble syncing between your email server and Salesforce, you can reset that rep's sync process. Resetting sync clears out and then restores the connections between a rep's email and calendar applications and Salesforce records. Resetting the sync process doesn't affect information stored in those records.

1. If set up to sync contacts using Lightning Sync for Microsoft Exchange, make sure that the rep's `Salesforce_Sync` folder contains only contacts the rep wants to sync with Salesforce. Lightning Sync for Google users can ignore this step.

2. If set up to sync events, make sure that events that the rep doesn't want to sync are managed from the rep's calendar application.

3. From Salesforce Setup, enter *Lightning Sync Status* in the `Quick Find` box, then select **Lightning Sync Status**.

4. Type a rep's name, and click **Reset Sync**.
   During the next sync cycle, Lightning Sync:

   - Syncs all contacts between the rep's `Salesforce_Sync` folder (Microsoft Exchange) or `Salesforce Sync` group (Google Contacts) and Salesforce. Lightning Sync excludes contacts that fall outside of the filters you set in the rep's sync configuration.

   - Syncs all events from the rep's calendar application to Salesforce. Lightning Sync excludes events that fall outside of the filters you set in the rep's sync configuration, or events that the rep prevented from syncing.

Test Your Connection Between Your Email and Calendar Server and Salesforce

Lightning Sync for Microsoft® Exchange users should run both the Lightning Sync connection test and the Microsoft Remote Connectivity Analyzer to test connectivity. The tests differ slightly, so running both gives you more information about your connection status. Lightning Sync for Google users need only run the Lightning Sync connection test.

Test your connection status to confirm whether you and your IT pros have set up Lightning Sync successfully. Or, run the connection tests if Lightning Sync was syncing successfully, but syncing suddenly stops for all reps in your Salesforce organization.

> **Note:** The Microsoft Remote Connectivity Test and the Lightning Sync Connection Test check general connectivity between your email server and your Salesforce organization. If you want to test connectivity for only one (or a few) of your reps, check their sync statuses from `Lightning Sync Status` in Setup.

- Run the Microsoft® Remote Connectivity Analyzer with Lightning Sync Parameters
- Run the Lightning Sync Connection Test for Microsoft® Exchange Users
- Run the Lightning Sync Connection Test for Google Users

Lightning Sync for Microsoft® Exchange Statuses

Understanding Lightning Sync for Microsoft Exchange statuses helps you assess and address
Lightning Sync errors that appear on the Lightning Sync status page in Salesforce.

System Statuses

Table 2: Configuration Setup Statuses

If	Provides this status	This status means that
Microsoft Exchange service account provided:	*Your Service Account User Name*	You've saved your service account credentials in Salesforce, and Lightning Sync has recognized a valid service account. This status doesn't necessarily mean that the service account is set up to sync using Lightning Sync. If you continue to have sync errors, we recommend that you use Microsoft®'s Remote Connectivity Analyzer tool to test your connection and troubleshoot setup issues.
	None	Lightning Sync couldn't save your service account credentials. Verify that you've provided the correct service account ID and password and that you've set up a valid service account in Microsoft Exchange.
Lightning for Outlook enabled:	Yes	You've enabled Lightning for Outlook in Setup. If you've set up sales reps to select which Microsoft events sync to Salesforce, reps select events using Lightning for Outlook.
	No	You haven't enabled Lightning for Outlook in Setup. If you've set up sales reps to select which Microsoft events sync to Salesforce, reps can't select events until you've enabled Lightning for Outlook.
Salesforce recognizes Microsoft Exchange service account:	✅	Lightning Sync recognizes the service account that you

If	Provides this status	This status means that
		provided. This status doesn't necessarily mean that the service account is set up to sync using Lightning Sync. If you continue to see sync errors, we recommend that you use Microsoft®'s Remote Connectivity Analyzer tool to test your connection and troubleshoot setup issues.
		Lightning Sync couldn't recognize the service account that you provided. Check to make sure that you've set up a valid service account in Microsoft Exchange.
Users with linked Microsoft Exchange and Salesforce email addresses:	The expected number of Lightning Sync users	All of your users' Microsoft Exchange email addresses have mapped correctly to the corresponding Salesforce email addresses.
	An unexpected number of Lightning Sync users	Some of your users' Microsoft Exchange email addresses have not mapped correctly to the corresponding Salesforce email addresses. Compare your users' addresses in Exchange and Salesforce to verify that they match.
	0	None of your users' Microsoft Exchange email addresses has mapped to its corresponding Salesforce email addresses. Contact Salesforce Customer Support.

Table 3: Contacts Statuses

If	Provides this status	This status means that
Last sync activity:	A contact sync time within the last few minutes	Your organization last synced contacts with Lightning Sync on this date, at this time. In general, Lightning Sync is syncing records as expected. If you see this status and individual users still report that contacts are not syncing as expected, check your Exchange server or Lightning Sync configurations for settings related to those particular users.
	A contact sync time within a few hours	Your organization last synced contacts on this date, at this time. It's possible you recently set up Lightning Sync, because the initial contacts sync might take up to several hours to complete. If you haven't initiated contacts sync for your organization for the

If	Provides this status	This status means that
		first time, this status might indicate a problem with contacts sync in your organization. Monitor the last sync activity over the next 24 hours to see if syncing resumes.
	A contact sync time on a past date	Your organization last synced contacts on this date, at this time. If your organization doesn't sync again within 24 hours, verify that you provided the correct Exchange service account credentials, that Salesforce recognized your service account, and that you've used Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.
Records synced in last 60 minutes:	The number of contacts that were synced in your organization in the last 60 minutes	Within the last 60 minutes, your organization last synced this number of contacts.
	0	Your organization hasn't synced any contacts within the last 60 minutes. Monitor record sync activity over the next 24 hours to see if sync resumes. If sync doesn't resume, use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.
Records synced in last 24 hours:	The number of contacts that were synced in your organization over the last 24 hours	Within the last 24 hours, your organization synced this number of contacts.
	0	Your organization hasn't synced any contacts within the last 60 minutes. Use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.

Table 4: Events Statuses

If	Provides this status	This status means that
Last sync activity:	An event sync time within the last few minutes	Your organization last synced events with Lightning Sync on this date, at this time. In general, Lightning Sync is syncing records as expected. If you see this status and individual users still report that events are not syncing as expected, check your Exchange server or Lightning Sync configurations for settings related to those particular users.
	An event sync time within a few hours	Your organization last synced events on this date, at this time. You might have recently set up Lightning Sync, because the initial events sync might take up to several hours to complete. If you haven't initiated events sync for your organization for the first time, this status might indicate a problem with events sync in your organization. Monitor the last sync activity over the next 24 hours to see if syncing resumes.
	An event sync time on a past date	Your organization last synced events on this date, at this time. If your organization doesn't sync again within 24 hours or longer, verify that you provided the correct Exchange service account credentials, that Salesforce recognized your service account, and that you've used Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.
Records synced in last 60 minutes:	The number of events that were synced in your organization in the last 60 minutes	Within the last 60 minutes, your organization last synced this number of events.
	0	Your organization hasn't synced any events within the last 60 minutes. Monitor record sync activity over the next 24 hours to see if syncing resumes. If syncing doesn't resume, use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.

If	Provides this status	This status means that
Records synced in last 24 hours:	The number of contacts that were synced in your organization in the last 24 hours	Within the last 24 hours, your organization synced this number of contacts.
	0	Your organization hasn't synced any events within the last 60 minutes. Use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support.

User Statuses

Table 5: Configuration Setup Statuses

If	Provides this status	This status means that
User assigned to active Exchange configuration:	✔	This user is set up to sync in an active Lightning Sync configuration.
	✖	This user isn't set up to sync in an active Lightning Sync configuration.
User mailbox is running on supported version of Microsoft Exchange:	✔	Lightning Sync supports this user's version of Microsoft Exchange.
	✖	Lightning Sync doesn't support this user's version of Microsoft Exchange.
User recognized by Exchange service account:	✔	This user is represented by the service account that you've set up in Exchange, and Lightning Sync can communicate with your Exchange service account.
	✖	This user isn't represented by the service account that you've set up in Exchange, or Lightning Sync can't communicate with the Exchange service account that you provided. Check your Exchange service account setup to verify that you've set up a valid service account and that it accurately represents this user.
User's reset sync status:	Marked for reset	You've reset this user for sync, but the reset hasn't started. Your reset request is in the system queue and will be completed when the system is available.
	Reset in progress	The reset sync process is in progress. When reset is complete, "User's reset sync status" is no longer displayed on this page.

If	Provides this status	This status means that
User set up Lightning for Outlook:	Yes	This sales reps has set up Lightning for Outlook. If you've set up reps to select which Microsoft events sync to Salesforce, reps select events using Lightning for Outlook.
	No	This sales rep hasn't set up Lightning for Outlook. If you've set up reps to select which Microsoft events sync to Salesforce, reps can't select events until they've set up Lightning for Outlook.

Table 6: Contacts Statuses

If	Provides this status	This status means that
Salesforce_Sync folder found:	✔	The Salesforce_Sync folder was found in this user's email account under the Contacts directory.
	✖	Lightning Sync can't find the Salesforce_Sync folder on your Exchange server or can't create it automatically for this user. You can create the folder Salesforce_Sync for this user as a subdirectory under the Contacts directory in this user's email account.
Salesforce and Exchange email addresses linked:	✔	This user's Microsoft Exchange email address has mapped to the user's Salesforce email address correctly.
	✖	This user's Microsoft Exchange email address hasn't mapped to the user's Salesforce email address correctly. Reset sync for this user.
Salesforce to Exchange sync status:	Not started	This user's contacts hasn't started syncing from Salesforce to Exchange.
	Initial sync in progress	This user's contacts are syncing from Salesforce to Exchange for the first time. This initial sync might take several hours.
	Initial sync completed	This user's contacts have completed syncing from Salesforce to Exchange for the first time.
	Sync in progress	This user's contacts are syncing from Salesforce to Exchange right now.
	In sync	This user's contacts have completed syncing from Salesforce to Exchange.

If	Provides this status	This status means that
	Exchange configuration not set to sync	This user isn't set up to sync contacts from Salesforce to Exchange in an active Lightning Sync configuration.
Exchange to Salesforce sync status:	Not started	This user's contacts have not started syncing from Exchange to Salesforce yet.
	Initial sync in progress	This user's contacts are syncing from Exchange to Salesforce for the first time. This initial sync might take several hours.
	Initial sync completed	This user's contacts have completed syncing from Exchange to Salesforce for the first time.
	Sync in progress	This user's contacts are syncing from Exchange to Salesforce.
	In sync	This user's contacts have completed syncing from Exchange Salesforce.
	Exchange configuration not set to sync	This user isn't set up to sync contacts from Exchange to Salesforce in an active Lightning Sync configuration.
Records in sync	The number of contacts that are syncing for this user	This user has this number of contacts syncing between Exchange and Salesforce. If this user's contacts are syncing as expected, this number matches the number of contacts in this user's Salesforce_Sync folder.

Table 7: Event Statuses

If	Provides this status	This status means that
Calendar folder found:	✓	The calendar folder was found in this user's email account.
	✗	Lightning Sync can't find the user's calendar folder on your Exchange server.
Salesforce and Exchange email addresses linked:	✓	This user's Microsoft Exchange email address has mapped to the user's Salesforce email address correctly.
	✗	This user's Microsoft Exchange email address hasn't mapped to the user's Salesforce email address correctly. Reset sync for this user.
Salesforce to Exchange sync status:	Not started	This user's events haven't started syncing from Salesforce to Exchange.

If	Provides this status	This status means that
	Initial sync in progress	This user's events are syncing from Salesforce to Exchange for the first time. This initial sync might take several hours.
	Initial sync completed	This user's events have completed syncing from Salesforce to Exchange for the first time.
	Sync in progress	This user's events are syncing from Salesforce to Exchange right now.
	In sync	This user's events have completed syncing from Salesforce to Exchange.
	Exchange configuration not set to sync	This user isn't set up to sync events from Salesforce to Exchange in an active Lightning Sync configuration.
Exchange to Salesforce sync status:	Not started	This user's events haven't started syncing from Exchange to Salesforce.
	Initial sync in progress	This user's events are syncing from Exchange to Salesforce for the first time. This initial sync might take several hours.
	Initial sync completed	This user's events have completed syncing from Exchange to Salesforce for the first time.
	Sync in progress	This user's events are syncing from Exchange to Salesforce.
	In sync	This user's events have completed syncing from Exchange Salesforce.
	Exchange configuration not set to sync	This user isn't set up to sync events from Exchange to Salesforce in an active Lightning Sync configuration.
Records in sync	The number of events that are syncing for this user	This user has this number of events syncing from Exchange to Salesforce. If this user reports difficulty syncing only some events, verify that the user is set up to sync events as expected in the user's Lightning Sync configuration and that the user didn't assign the `private` option to the event. Also remember that at this time, Lightning Sync doesn't sync recurring events or invitees on events.

Set Up and Maintain Sales Tools

Salesforce for Outlook: Set up Sales Reps to Experience
Salesforce from Microsoft Outlook Using a Desktop-Based
Product

Salesforce for Outlook: Set up Sales Reps to Experience Salesforce from Microsoft Outlook Using a Desktop-Based Product

Salesforce for Outlook System Requirements

Confirm that your computing systems meet these system requirements before you download and install Salesforce for Outlook.

Basic Resource	Required Version
Salesforce for Outlook	Salesforce for Outlook v3.0.0 or later after Salesforce Disables TLS 1.0 encryption protocol.
Default email program	Any of the following versions of Microsoft® Outlook® using Microsoft Exchange Online (part of Microsoft Office 365™) or Microsoft Exchange Server (on-premises), along with the latest updates. • 2016 (32 and 64 bit) • 2013 (32 and 64 bit) • 2010 (32 and 64 bit) • Outlook 2007 (until Microsoft retirement in October 2017) Salesforce for Outlook supports Outlook installed using Click-to-Run (a streaming installer for Microsoft Office).
Operating system	Any of the following versions of Microsoft Windows®, along with the latest hot fixes. • Windows 10 • Windows 8.1 (Pro and Enterprise) • Windows 7 For customers using Apple® Mac OS®, consider setting up Lightning for Outlook and Lightning Sync.
Browser	Microsoft Internet Explorer® with TLS encryption protocol 1.1 or later enabled. See "Other Requirements" for feature-specific browser limitations.

Other Requirements

Other Features	Requirement
Creating records using the Salesforce Side Panel Publisher	In Winter '17, you need Microsoft Internet Explorer 9 or later. Starting in Spring '17, you need Microsoft Internet Explorer 11.
Server configurations	We support using these systems that connect to the Internet through a proxy server. • Automatic proxy detection

Set Up and Maintain Sales Tools

Salesforce for Outlook: Set up Sales Reps to Experience
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Other Features	Requirement
	• Manual proxy
	• NTLM proxy authentication
	We don't support using:
	• IMAP and POP3 email servers.
	• Terminal servers, such as Citrix® servers. Consider setting up Lightning for Outlook and Lightning Sync.
	• Proxy Automatic Configuration files (.pac).
Installers	If you're an administrator and plan to use the `.msi` installer, you may need to install the following tools:
	• Microsoft .NET Framework 4.5.2, 4.6, 4.6.1, or 4.6.2
	• Microsoft Visual Studio® 2010 Tools for Office Runtime
	• Primary Interop Assemblies (PIA) Redistributable for your version of Microsoft Outlook
	Windows 7 `.msi` users must run the command prompt as an administrator and then launch the installer from the command line. For example: `msiexec /i SalesforceForOutlook.msi.`
Single Sign-On	We support using either:
	• Delegated authentication
	• Security Assertion Markup Language (SAML) with My Domain
	We don't support using a separate online identity provider for single sign-on.

SEE ALSO:

Lightning for Outlook: Set Up Sales Reps to Experience Salesforce from Microsoft® Outlook®

Lightning Sync: Sync Your Sales Reps' Microsoft® or Google Contacts and Events with Salesforce

Outlook Configurations and Email Application Publisher Layouts

To set up your Salesforce for Outlook users with the settings they need, create Outlook configurations and email application publisher layouts. With Outlook configurations, you can choose how your reps sync contacts, events, and tasks between Microsoft Outlook and Salesforce, or how reps can access Salesforce content from the Salesforce Side Panel in Outlook. With email application publisher layouts, set up your reps to create Salesforce records directly from the Salesforce Side Panel. To create Outlook configurations and email application publisher layouts from Setup, enter `Outlook Configurations` in the `Quick Find` box, then select **Outlook Configurations**.

Salesforce for Outlook Configurations

Salesforce for Outlook configurations include settings for the data that Salesforce for Outlook users can sync between Microsoft® Outlook® and Salesforce. Administrators can create separate configurations for different types of users, and give users permission to edit some of their own settings. For example, an opportunity team might want to sync everything, while a manager might want to sync only events.

In addition, you can set up your users to create, view, and work with Salesforce records directly in Outlook from the Salesforce Side Panel. The side panel allows users to easily add Outlook emails, events, and tasks to related Salesforce records. Here's how:

▶ Using the Salesforce Side Panel to Work with Records in Microsoft® Outlook®

Email Application Publisher Layouts

Users can create accounts, cases, leads, opportunities, and even custom objects directly from the side panel using the email application actions menu. To set up your users to work with the actions menu for Salesforce for Outlook, create the quick actions that you want users to have access to, add those quick actions to the appropriate publisher layouts, and assign the publisher layouts to the right users.

SEE ALSO:

Create Salesforce for Outlook Configurations

Define Data Sets for Salesforce for Outlook

Salesforce for Outlook Configurations for Contact Manager and Group Editions

Email Application Publisher Layouts: Set Up Reps to Create Records Directly from Microsoft® Outlook® or Gmail™

Create Salesforce for Outlook Configurations

Before reps can start using Salesforce for Outlook, you define their experience by creating Outlook configurations. Outlook configurations define Salesforce for Outlook settings for reps, like which features reps have access to, and how reps' records sync between Outlook and Salesforce. If you'd like to define unique settings for a subset of your sales team, create multiple Outlook configurations, and assign reps accordingly.

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

2. Click **New Outlook Configuration**.

3. Enter a name and description of the configuration.

4. Select `Active` to activate the configuration.

5. Select `Notify of product updates` so that sales reps can see when upgrades for Salesforce for Outlook are available to download.

6. Depending on the experience you want your reps to have, define some or all these settings.

   - Assign users and profiles
   - Email-related options for the Salesforce Side Panel, as well as add email and create cases
   - Sync direction
   - Conflict behavior
   - Field mappings
   - Matching criteria
   - Modification permissions
   - Advanced settings

7. Click **Save**.

8. Define data sets.

When first time Salesforce for Outlook users log in to Salesforce from the Salesforce for Outlook setup wizard, these settings take effect immediately. Any changes you make to active Outlook configurations take effect the next time sales reps open Outlook.

SEE ALSO:

Salesforce for Outlook Configurations for Contact Manager and Group Editions

Set Up and Maintain Sales Tools

Salesforce for Outlook: Set up Sales Reps to Experience
Salesforce from Microsoft Outlook Using a Desktop-Based
Product

Assign Users to Salesforce for Outlook Configurations

After you define basic information for a Salesforce for Outlook configuration, you select the
Salesforce for Outlook users that the configuration's settings will apply to.

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

2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields.

3. In the Assign Users and Profiles section, select either `Profiles` or `Users` in the `Search` drop-down list.

4. If you don't see the member you want to add, enter keywords in the search box and click **Find**.

5. Select members from the Available Members box, and click **Add** to add them to the group. If all available users are assigned to this configuration, the Users list is empty and you can only assign profiles.

6. To remove members, select those members and click **Remove**. If removed users are assigned to another active configuration through a profile, that other configuration is used the next time they open Outlook. Otherwise, removed users are unable to use Salesforce for Outlook.

7. Click **Save**. All changes take effect the next time data syncs for the users in this configuration. If you assign a user who is already assigned to a different configuration, that user is removed from the other configuration and assigned to this one. If an assigned user is also part of a profile assigned to another active configuration, the configuration that lists the user directly is used.

SEE ALSO:

Create Salesforce for Outlook Configurations

Outlook Configurations and Email Application Publisher Layouts

Set Up Email Options for Salesforce for Outlook

Define Data Settings for Salesforce for Outlook

Data settings control the sync behavior and email functionality of Salesforce for Outlook. You can define the following settings using the Data Settings fields in a Salesforce for Outlook configuration.

- Email-related options for the Salesforce Side Panel, as well as add email and create cases
- Sync direction
- Conflict behavior
- Field mappings
- Matching criteria
- Modification permissions

Set Up Email Options for Salesforce for Outlook

Help your sales teams track important Microsoft® Outlook® emails related to Salesforce contacts and leads. And get those contacts and leads to appear directly in Outlook.

Enable the Salesforce Side Panel

Let your sales reps see Salesforce contacts and leads that are relevant to your reps' emails and events.

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

2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields.

3. Select `Side Panel`.

4. Save your changes.

Let Side Panel Sales Reps Add Emails, Attachments, Events, and Tasks to Records

The `Add Email` setting lets them add Outlook emails and their attachments (🖼), events (📅), and tasks (📋) to their Salesforce records directly from the side panel. You can also let your reps `Allow users to select attachments` (📎), which lets sales reps choose specific attachments to add to Salesforce, instead of automatically including them all.

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

2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields.

3. Select `Side Panel`.

4. Select `Add Email`.

5. To let reps choose specific attachments to add to Salesforce, select **Allow users to select attachments**.

6. Save your changes.

Let Users Who Aren't Working in the Side Panel Add Emails and Attachments to Records

For sales reps who don't have the side panel enabled, the `Add Email` setting adds the **Add Emails** and **Send and Add** buttons to the Outlook ribbon. The setting also lets your reps add up to 10 emails simultaneously to Salesforce.

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

2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields.

3. Deselect `Side Panel`.

4. Select `Add Email`.

5. Save your changes.

6. If you don't have My Email to Salesforce enabled, click **Enable** in the popup message to enable it.

Let Users Who Aren't Working in the Side Panel Create Cases from Outlook

For sales reps who don't have the side panel enabled, the **Create Cases** setting adds the drop-down list button to Outlook. The setting also lets your reps create Salesforce cases from Outlook emails. If you've enabled the side panel for your reps, you can give them access to the Side Panel Publisher. The publisher lets your reps create various kinds of Salesforce records directly from the side panel.

📝 Note: Before you can enable the Create Case feature, review and complete the procedures in Set Up Create Case for Salesforce for Outlook Users on page 425. Then, return to this topic to complete the following procedure.

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

2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields.

3. Clear the `Side Panel` option.

4. Select `Create Case`. Then, choose one of these links.

   - *Recommended:* **Choose an Existing Create Case Destination**, which lets you choose existing destinations. You can choose up to 10 destinations for each Outlook configuration.

   - **Create a New Create Case Destination**. To create one, save your work first, then create the destination. After that, return to the Outlook Configuration page to complete the Create Case setup requirements.

5. Save your changes.

SEE ALSO:

Create Salesforce for Outlook Configurations

Assign Users to Salesforce for Outlook Configurations

Email Application Publisher Layouts: Set Up Reps to Create Records Directly from Microsoft® Outlook® or Gmail™

Set Up and Maintain Sales Tools

Salesforce for Outlook: Set up Sales Reps to Experience
Salesforce from Microsoft Outlook Using a Desktop-Based
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Learn How Enabling Recurring Events Affects Users

Your Salesforce and API users can expect the following changes after you enable the
Salesforce for Outlook Recurring Events feature.

For	You should know that
Salesforce users	Changes made to a series don't affect past events.
	Changes made to the following fields in an event series override changes previously made to single events.
	• Event start or end time
	• All-day event
	• Frequency
	• Recurrence start date, if a user sends updates to invitees
	In addition, if users change any of those fields, all events in the series are deleted and re-created. As a result, the status of all invitees is reset to Not Responded.
API users	After users start syncing recurring events, the following read-only API objects appear in the API.
	• EventRecurrenceException
	• TaskRecurrenceException

SEE ALSO:

Set Up Email Options for Salesforce for Outlook

Outlook Configurations and Email Application Publisher Layouts

Set Up Create Case for Salesforce for Outlook Users

The Create Case feature in Salesforce for Outlook lets users create cases in Salesforce from emails
in Microsoft® Outlook®. As an administrator, you can create Email-to-Case destinations that appear
in the drop-down list button **Create Cases** in Outlook. For each destination, you choose the assignee,
which can be either individual users or queues. You can add up to 10 destinations for each Outlook
configuration. When users create cases, they can add up to 10 emails simultaneously for each
destination.

Before Salesforce for Outlook users can create cases from Outlook emails, you'll need to perform
the following procedures.

1. If you haven't already done so, enable and configure On-Demand Email-to-Case.

2. Define Email-to-Case destinations (also known as email routing addresses).

3. Enable the Create Case feature in your configurations, which adds the **Create Cases** drop-down list button in Outlook.

Salesforce for Outlook assigns a category to the emails that Salesforce for Outlook users add as cases to Salesforce. This category, *Added to Salesforce as a case*, makes it easy for users to search for emails they added as cases to Salesforce.

SEE ALSO:

Email Application Publisher Layouts: Set Up Reps to Create Records Directly from Microsoft® Outlook® or Gmail™

Create Salesforce for Outlook Configurations

Set Up Email Options for Salesforce for Outlook

Define Sync Directions for Your Salesforce for Outlook Users

Set sync directions for sales reps who sync contacts, events, and tasks between Microsoft® Outlook® and Salesforce.

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

2. Create or edit a configuration, and select one of these sync directions under Data Settings for each object being synced.

   - `Don't sync`—Outlook and Salesforce records aren't synced, and you can't select an Outlook folder to sync within the setup wizard.

   - `Salesforce to Outlook`—When data first syncs, a record in Salesforce creates or updates a record in Outlook. During future syncs, changes made to Salesforce records appear in Outlook, regardless of whether the Outlook version of the record has changed. In addition, deleting a synced record in Salesforce deletes its Outlook counterpart. Outlook changes are never sent to Salesforce. The required conflict behavior setting for this option is `Salesforce always wins`.

   - `Outlook to Salesforce`—During its first sync, a record in Outlook creates or updates a record in Salesforce. During future syncs, changes made to Outlook records appear in Salesforce, regardless of whether the Salesforce version has changed. In addition, deleting a synced record in Outlook deletes its Salesforce counterpart. Salesforce changes are never sent to Outlook. The required conflict behavior setting for this option is `Outlook always wins`. This option isn't available for contacts.

   - `Sync both ways`—When records sync, changes to Outlook and Salesforce sync between the two systems. If records conflict, the conflict behavior setting determines which record wins.

3. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

4. Define a data set for each object that has a sync direction.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
- "View Setup and Configuration"

To create, edit, or delete configurations:
- "Manage Email Client Configurations"

SEE ALSO:

Outlook Configurations and Email Application Publisher Layouts

Set Up Email Options for Salesforce for Outlook

Create Salesforce for Outlook Configurations

Define Data Sets for Salesforce for Outlook

Set Up and Maintain Sales Tools

Salesforce for Outlook: Set up Sales Reps to Experience
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Define Conflict Behavior for Salesforce for Outlook

Conflict behavior settings determine what happens when Salesforce for Outlook encounters a conflict when syncing data both ways. A conflict occurs when the same record is updated in both Salesforce and Outlook or when a record is updated on one side and deleted on the other.

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

2. Edit a configuration, and select one of the following conflict behaviors under Data Settings for Contacts, Events, and Tasks.

   - *Salesforce always wins*
   - *Outlook always wins*

3. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

SEE ALSO:

   Outlook Configurations and Email Application Publisher Layouts

   Create Salesforce for Outlook Configurations

   Customize the Fields That Sync Between Salesforce and Microsoft® Outlook®

   Define Sync Directions for Your Salesforce for Outlook Users

Customize the Fields That Sync Between Salesforce and Microsoft® Outlook®

Customize fields in the records that your sales reps sync using Salesforce for Outlook. Also add custom Outlook or Salesforce fields you want your reps to sync.

Field mappings define which Salesforce and Outlook fields correspond when items sync between the two systems. Salesforce comes with a set of default mappings. Decide whether to let your sales reps edit their own field mappings in their personal settings.

Map these custom field types.

- Outlook text fields
- Salesforce text fields
- Some Salesforce picklist fields

Edit default field mappings or set up custom field mappings for your reps.

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

2. Select an Outlook Configuration you'd like to edit, or create a new one.

3. Under Data Settings, click **Edit Field Mappings** under `Contacts`, `Events`, or `Tasks` to display all the fields for records on that object.

4. Review which Salesforce fields are mapping to each Outlook field.

5. Edit the Salesforce or Outlook field mappings you'd like to change, or create mappings for custom fields. Salesforce for Outlook lets you edit any field mapping with a picklist. You can add more mappings at the bottom of the list. You can remove mappings by clicking the X next to the mapping.

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> ⚠ **Warning:** If you map a custom field that is universally required, make sure that it has a default value to avoid errors. Also, mapping custom fields that require validation by Salesforce can cause sync errors. For example, you map a custom Salesforce field that requires a unique value. If you enter a non-unique value in the Outlook field, you receive a sync error.

6. Click **Save**. Field mappings begin syncing on items the next time those items are updated in either Salesforce or Outlook.

SEE ALSO:

Create Salesforce for Outlook Configurations

Outlook Configurations and Email Application Publisher Layouts

Define Matching Criteria for Salesforce for Outlook

Define Conflict Behavior for Salesforce for Outlook

Define Matching Criteria for Salesforce for Outlook

Define how Salesforce for Outlook handles multiple matching Salesforce contacts when a contact first syncs from Outlook.

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

2. Edit a configuration, and select one of these matching criteria options under Data Settings for contacts.

- `Most recent activity`—Choose the Salesforce contact that shows the most recent activity (such as a phone call or email), as shown in the contact's Activity History related list. This option is the default matching criteria.
- `Last updated`—Choose the Salesforce contact that was most recently modified.
- `Oldest`—Choose the Salesforce contact that has the earliest creation date.

3. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

If we don't find a matching contact in Salesforce, we create one that syncs with the Outlook contact. We then either assign the synced contact to a Salesforce account, leave it unassigned, or place it in your sales rep's My Unresolved Items page.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
- "View Setup and Configuration"

To create, edit, or delete configurations:
- "Manage Email Client Configurations"

SEE ALSO:

Create Salesforce for Outlook Configurations

Outlook Configurations and Email Application Publisher Layouts

Customize the Fields That Sync Between Salesforce and Microsoft® Outlook®

Set Up and Maintain Sales Tools

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Let Users Modify Salesforce for Outlook Settings

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

2. Edit a configuration, and select any of the following options under Data Settings for each object being synced. You can allow users to modify:

   - `Whether object is synced`
   - `Sync direction`
   - `Conflict behavior`
   - `Field mappings`
   - `Outlook folder for syncing`

3. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

You can overwrite users' modifications any time by selecting `Overwrite configuration changes made by users` in a configuration. After you save the updated configuration, the new settings replace the existing settings for users of the configuration the next time their data syncs.

Assign Users' Sync Folders in Microsoft® Outlook®

You can assign your Salesforce for Outlook users' contact, event, and task sync folders in Outlook to simplify their setup process and keep sync folders consistent across your company. You can specify Outlook sync folders from Salesforce Outlook configurations.

By default, users can change the Outlook folders where their Salesforce contacts, events, and tasks sync from the Settings menu in their Salesforce for Outlook system tray. You can prevent users from changing their Outlook sync folders when you clear this default setting for contacts, events, and tasks, and assign specific Outlook sync folders from users' Outlook configurations.

> **Note:** Assigning Outlook sync folders might create Outlook directory folders for all of the users in your Outlook configuration. Salesforce for Outlook can't remove Outlook sync folders from your users' Outlook directories after they've been created. If you reassign a different folder later, the original folder remains in users' local Outlook directories until users delete the folder.

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

2. Open an Outlook configuration.

3. To assign a folder where users sync contacts, in Data Settings, deselect **Outlook folder for syncing contacts** on the `Allow users to modify:` setting.

4. In the text box that appears, type the name of the Outlook folder where you want your users' contacts to sync with Salesforce. Type the name of a common folder that exists in the Outlook directory for each of your users, at the same directory level as the Outlook default contacts folder. Folder names are case sensitive. If you type the name of a folder that doesn't exist at that level for each user, Salesforce creates the folder in Outlook for those users. To have Salesforce for Outlook sync with a nested Outlook folder, type a filepath, including backslashes (\).
   For example, to assign the Outlook folder "sfdc_sync_contacts" as a nested directory under your users' default Outlook contacts folder, type `Contacts\sfdc_sync_contacts` in the `Outlook folder for syncing contacts` text box,

where `Contacts` is your users' default contacts folder, and `sfdc_sync_contacts` is the folder where you want your users' Salesforce contacts to sync.

If the folder exists in your users' Outlook directories, Salesforce for Outlook syncs your contacts with it. If the folder doesn't exist, Salesforce for Outlook creates a folder at "Contacts\sfdc_sync_contacts."
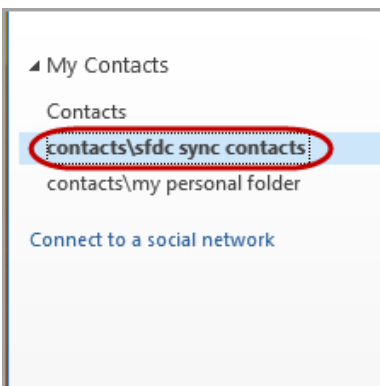
5. Click **Save**.

6. Instruct your users to save their Salesforce for Outlook settings again to confirm the changes that you've made to their systems. To do so, instruct your users to:

   a. In the settings wizard, right-click the Salesforce for Outlook icon ( ) in their system tray, and then click **Settings**.

   b. Click **Next** from Review Your Sync Direction.

   c. Click **Next** from Control Which Outlook Items Sync.

   d. Click **Save** from Syncing Private Items.

   Salesforce for Outlook locates Outlook folders that exist in your users' Outlook directories or creates them for your users.

7. Instruct your users to move the Outlook contacts that they want to sync to the folder that you specified.

To change the Outlook folder locations where users sync events and tasks with Salesforce, repeat steps 3 through 7 in the events and tasks sections.

Define Advanced Settings for Salesforce for Outlook

Use advanced settings in a Salesforce for Outlook configuration to customize the default behavior of Salesforce for Outlook, such as setting the maximum size of the sync log. Click **Edit** to change the value of an advanced setting or **Remove** to remove it from the configuration.

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

2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields.

3. Click **Add Advanced Setting** in the Advanced Settings section of an Outlook configuration.

4. Choose one of these settings and enter a value.

Advanced Setting	This setting indicates
HTTPTimeout	The number of seconds Salesforce for Outlook waits while trying to establish an HTTP connection with Salesforce. The value must be between 15 and 360 seconds, and the default is 30.
MaxLogFileSize	The maximum file size of the sync log you'll maintain. Value must be between 1 and 128 MB, and the default is 1.
MaxRetries	The number of times Salesforce for Outlook tries to connect to Salesforce. The value must be between 0 and 10, and the default is 3.

5. Click **OK**.

6. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

SEE ALSO:

Salesforce for Outlook Configurations for Contact Manager and Group Editions

Learn about sync settings that come with Salesforce Contact Manager and Group editions.

The setting for	Is
Salesforce Side Panel	Enabled
Add Email	Enabled
Contacts	• Sync Direction—*Sync both ways* • Conflict Behavior—*Outlook always wins*

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
• "View Setup and Configuration"

To create, edit, or delete configurations:
• "Manage Email Client Configurations"

EDITIONS

Available to set up in: both Salesforce Classic and Lightning Experience

Available in: **Contact Manager** and **Group** Editions

The setting for	Is
	• Filters

	<pre>Contacts: User's Records
	Contacts on Accounts: User's Records
	Contacts in Chatter: Records User is Following</pre>

	• Field Mapping—*Default settings*
	• Matching Criteria—`Most recent activity`
Events	• Sync Direction—*Sync both ways*
	• Conflict Behavior—*Outlook always wins*
	• Filters

	<pre>User's Records
	Date greater or equal to LAST 30 DAYS</pre>

	• Field Mapping—*Default settings*
Tasks	• Sync Direction—*Sync both ways*
	• Conflict Behavior—*Salesforce always wins*
	• Filters

	<pre>User's Records
	Due date greater or equal to LAST 30 DAYS</pre>

	• Field Mapping—*Default settings*

Define Data Sets for Salesforce for Outlook

Data sets are subsets of the Salesforce records that Salesforce for Outlook users can sync. They consist of filters that limit which records sync. Each configuration must have a data set in order for users to sync with Outlook.

The Outlook Configuration detail page shows a summary of the configuration's current filters.

> **Note:** If your company uses Platform Encryption, you can't set filters on fields you've encrypted. Otherwise, Salesforce for Outlook can't sync contacts, events, or tasks for users assigned to that configuration.

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

2. Click the name of an Outlook configuration.

3. In the Data Sets related list, click **Edit**.

4. Specify filters.

5. To see how many items sync with the filters you've specified, you can check the data set size.

6. Click **Save**.

SEE ALSO:

Sample Lightning Sync and Salesforce for Outlook Data Sets

Salesforce for Outlook Contact Filters

Outlook Configurations and Email Application Publisher Layouts

Check the Size of Salesforce for Outlook Data Sets

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

USER PERMISSIONS

To view configurations:
- "View Setup and Configuration"

To create, edit, or delete configurations:
- "Manage Email Client Configurations"

To create, edit, or delete data sets:
- Sync Direction can't be `Don't sync`

Learning about Data Sets for Salesforce for Outlook

Data sets are subsets of the Salesforce records that Salesforce for Outlook users can sync. They consist of filters that limit which records sync.

Knowing What Syncs

Salesforce for Outlook syncs records based on definitions in data sets, along with records related to them.

Understanding Limits to Data Sets

When using data sets, users can sync up to 5,000 records per filter between Microsoft® Outlook® and Salesforce at a time. This means that if users have more than 5,000 records to sync based on the configuration of their data sets, Salesforce for Outlook won't sync some of them. In addition, users may find that syncing these large quantities of records may slow down the sync process. You can, however, increase the limits for the number of records users can sync. Just keep in mind that you can't reduce the likelihood of the sync process slowing down.

Increasing Limits to Data Sets

If your users are working with more than 5,000 records, you can configure their data sets so that they can sync larger quantities of records. To do this, you'll their edit data sets to include additional filters. For example, under Filter By Record Ownership in the Contact Filters section, choose **Selected Contacts**. Then, choose **User's Records** under Contacts, Contacts on Opportunities, and Contacts on Accounts. Because the data set now has three filters, your users can now sync up to 15,000 contact records.

Keep in mind that these various filters you set up won't necessarily select records that are mutually exclusive. Therefore, the sync process might not sync exactly 15,000 records. To avoid this situation, you can further refine the group of contacts you want to sync. Just define additional parameters under Filter By Additional Objects and Fields.

After defining the filters, you can get a record count for your users in the Data Set Size section. To do so, enter a user, and then click **Get Record Count**. If your users still exceed sync limits for the filters you set up, you users may find that the sync process selects records in a random fashion.

About Person Accounts

If your organization enabled person accounts and your users have more than 5,000 records in Salesforce, data sets work in a different way. Specifically, Salesforce runs a query first on person accounts that match filter criteria, and then on contacts assigned to these accounts. So it's possible for the sync process to reach the 5,000 record limit (including person accounts and contacts) and not include some of the contacts your users would expect to sync.

SEE ALSO:

Configure Contact Filters for Salesforce for Outlook

Enter Event Filters for Lightning Sync and Salesforce for Outlook

Create Task Filters for Salesforce for Outlook

Check the Size of Salesforce for Outlook Data Sets

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Configure Contact Filters for Salesforce for Outlook

USER PERMISSIONS		EDITIONS
To view configurations:	"View Setup and Configuration"	This feature available to manage from: both Salesforce Classic and Lightning Experience
To create, edit, or delete configurations:	"Manage Email Client Configurations"	
To filter contacts by opportunity teams:	"Opportunity Team Selling"	Available in all editions
To filter contacts by account teams:	"Account Teams"	
To create, edit, or delete data sets:	Sync Direction can't be *Don't sync*	

Data sets are subsets of the Salesforce records that Salesforce for Outlook users can sync. They consist of filters that limit which records sync. For example, you may want to let certain users sync all contacts, but let other users sync only contacts related to their opportunity teams. In addition, you can filter by the fields in the records, such as letting users sync only contacts related to specific accounts and opportunities.

The Outlook Configuration detail page shows a summary of the configuration's current filters.

📝 **Note:** If your company uses Platform Encryption, you can't set filters on fields you've encrypted. Otherwise, Salesforce for Outlook can't sync contacts, events, or tasks for users assigned to that configuration.

1. Define a data set for a configuration.

2. Under Filter By Record Ownership, specify the contacts users can sync.

3. If you choose **Selected Contacts**, you can further limit which contacts users sync.

For	To allow users to sync	Select
Contacts	All contacts that they own	`User's Records`
	All contacts they and their subordinates in the role hierarchy own	`User's Team's Records`
Contacts on Opportunities	Contacts related to their opportunities	`User's Records`
	Contacts related to opportunities that they and their subordinates in the role hierarchy own	`User's Team's Records`
	Contacts related to opportunities of which they are members of opportunity teams, but not opportunities that users own	`User's Opportunity Teams' Records`
Contacts on Accounts	Contacts related to their accounts	`User's Records`
	Contacts related to accounts they and their subordinates in the role hierarchy own	`User's Team's Records`
	Contacts related to accounts of which they are a team member, but not accounts that users own	`User's Account Teams' Records`

4. Under Filter By Additional Objects and Fields, add field-level filters you need.

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    a. Select an object and a field within that object.

    b. Select the correct filter operator.

    c. Enter a value for the selected field.

5. To add a new filter, click **Add Row**; to delete the last one in the list, click **Remove Row**.

6. Under Other Contacts to Include, you can choose to have Chatter contacts automatically sync for users of this configuration. To do this, select `Sync contacts users follow in Chatter`.

SEE ALSO:

    Salesforce for Outlook Contact Filters

    Define Data Sets for Salesforce for Outlook

    Check the Size of Salesforce for Outlook Data Sets

    Sample Lightning Sync and Salesforce for Outlook Data Sets

Salesforce for Outlook Contact Filters

Contact filters control the number of records that Salesforce for Outlook users can sync between Outlook and Salesforce. Note the following when using contact filters.

- The criteria you specify are AND based. That is, if you specify more than one criterion, the result includes only records that match all of the criteria.

- If entering a date, use the format allowed by your `Locale` setting. You can also use special date values like TODAY, NEXT WEEK, NEXT YEAR, LAST <number> DAYS, and so on.

- Place quotation marks around numbers or other data that includes commas. For example `Amount equals "10,000"` returns records that have an amount of $10,000 but `Amount equals 10,000` returns $10,000 as well as $10 and $0.

- When you use the "less than," "greater than," "less or equal," or "greater or equal" operators on fields that have numeric values, records with blank or "null" values are returned as if their value is zero (0).

- To limit results to records that are blank or contain "null" values for a particular field, choose the field and the "equals" or "not equal to" operators, leaving the third field blank. For example, `Amount equals` returns records with blank amount fields. You can search for blank values or other specified values at the same time. For example, `Amount equals 1,,2` returns records where the `Amount` is blank or contains the value "1" or "2". For example, if you create a workflow a filter for accounts with the criteria `Annual Revenue less than 100000`, account records match if their `Annual Revenue` is blank.

- To search for phone numbers, include the exact phone number formatting or example, `Phone starts with (561)`.

- Separate search terms by commas to filter by more than one value. You can enter up to 80 characters, including commas and spaces. For example, to search for accounts in California, New York, or Washington, use `State contains CA,NY,WA`.

- When you filter on standard long text area fields, such as `Description`, only the first 1000 characters of the field are searched.

- You can use the **Get Record Count** button to check how many records will sync for a sample Salesforce for Outlook user based on the configuration's filters.

- If you need to reference user information in your contact filters, you can add the following merge fields to them.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

Merge Field	Description
`$User.ID`	References the ID of the current user. This merge field can be applied to fields that contain a user lookup. The valid operators for this merge field are Equals and Not Equal To. When creating

Merge Field	Description
	mobile view filters that reference an owner field, you can only use the `$User.ID` merge field.
`$User.Username`	References the username of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.
`$User.Firstname`	References the first name of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.
`$User.Lastname`	References the last name of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.
`$User.Fullname`	References the first and last name of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With.

SEE ALSO:

Configure Contact Filters for Salesforce for Outlook

Define Data Sets for Salesforce for Outlook

Check the Size of Salesforce for Outlook Data Sets

Set Up and Maintain Sales Tools

Salesforce for Outlook: Set up Sales Reps to Experience
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Enter Event Filters for Lightning Sync and Salesforce for Outlook

Data sets are subsets of the Salesforce records that Salesforce for Outlook users can sync. They consist of filters that limit which records sync. For example, most users may sync only current and future events, while some users may need to also sync past events. Salesforce for Outlook syncs events based on their end dates rather than their start dates. For example, if you're syncing current and future events only, a two-day event that started yesterday still syncs.

The Data Sets section of the Outlook Configuration detail page shows a summary of the configuration's current event filters.

1. Define a data set for a configuration.

2. Under Events, enter one of these filters in the `Greater or equal to` field.

   - *TODAY*—Syncs events that end on or after today. The start time is 12:00 a.m.

   - *LAST MONTH*—Syncs events that ended on or after the first day of last month.

   - *LAST N DAYS*—Syncs events that ended on or after a specified number of days ago, such as *LAST 30 DAYS*.

3. You can use the **Get Record Count** button to check how many records will sync for a sample Salesforce for Outlook user based on the configuration's filters.

4. Save the data set.

   📝 Note: The following items don't sync: all-day events beginning on the first day you're configured to sync, and event attendees. Multiday events sync as single events in either direction. Multi-day events do sync.

SEE ALSO:

Sample Lightning Sync and Salesforce for Outlook Data Sets

Check the Size of Salesforce for Outlook Data Sets

Create Task Filters for Salesforce for Outlook

Specify which tasks sync between Microsoft® Outlook® and Salesforce for your sales teams.

Data sets are subsets of the Salesforce records that Salesforce for Outlook users can sync. They consist of filters that limit which records sync. For example, most users may sync past-due tasks, while other users sync only current and future tasks. Salesforce for Outlook syncs tasks based on their due dates rather than their start dates. For example, if you're syncing current and future tasks only, a task that started yesterday still syncs.

The Data Sets section of the Outlook Configuration detail page shows a summary of the configuration's current task filters.

1. Define a data set for a configuration.

2. Under Tasks, enter one of these filters in the `Greater or equal to` field.

   - *TODAY*—Syncs tasks that are due on or after today. The start time is 12:00 a.m.
   - *LAST MONTH*—Syncs tasks that were due on or after the first day of last month.
   - *LAST N DAYS*—Syncs tasks that were due on or after a specified number of days ago, such as *LAST 30 DAYS*.

3. Choose whether recurring Salesforce tasks sync to Outlook.

4. You can use the **Get Record Count** button to check how many records will sync for a sample Salesforce for Outlook user based on the configuration's filters.

5. Save the data set.

📝 **Note:** Salesforce for Outlook doesn't sync every kind of task. These kinds of tasks never sync:

   - Recurring Outlook tasks to Salesforce
   - Completed tasks, if marked as completed before Salesforce for Outlook syncs
   - Emails or contacts added to your to-do list when you flag items for follow-up (because Outlook doesn't consider these items to be tasks)

SEE ALSO:

Outlook Configurations and Email Application Publisher Layouts

Sample Lightning Sync and Salesforce for Outlook Data Sets

Set Up and Maintain Sales Tools

Salesforce for Outlook: Set up Sales Reps to Experience
Salesforce from Microsoft Outlook Using a Desktop-Based
Product

Sample Lightning Sync and Salesforce for Outlook Data Sets

Because users with the same role usually have similar data sync requirements, many administrators create sync configurations based on the positions in their organization. Below are sample data sets for common Salesforce groups. Your Salesforce for Outlook and Lightning Sync users have unique needs, but you can use these examples as a reference to help you get started creating Outlook configurations (for Salesforce for Outlook users) and Lightning Sync configurations (for Lightning Sync users).

Sales Manager

Sales managers usually need to see records they own and the records of the users who report to them. In addition, they need to see the latest contact information for anyone associated with large deals in the pipeline and any upcoming meetings that might be related to these deals. They may also like to have their Chatter contacts in Outlook.

Sample Outlook Configuration for Sales Managers:

```
Contacts
 Contacts: User's Records, User's Team's Records
 Contacts on Opportunities: User's Team's Records
 Contacts on Accounts: User's Team's Records
 Contacts in Chatter: Records User is Following

Events
 Events: User's Records
   Date greater or equal TODAY
Tasks
 Tasks: User's Records
   Date greater or equal TODAY
```

Sales Engineer

Sales Engineers often only need the contacts owned by them and the other members of their opportunity teams. They may also want their Chatter contacts, a record of the past month's meetings, and a schedule of all future meetings.

Sample Outlook Configuration for Sales Engineers:

```
Contacts
 Contacts: User's Records
 Contacts on Opportunities: User's Opportunity Teams' Records
 Contacts in Chatter: Records User is Following

Events
 Events: User's Records
   Date greater or equal LAST MONTH

Tasks
 Tasks: User's Records
   Date greater or equal LAST MONTH
```

Account Executive

Account executives need to see contacts related to their accounts and opportunities. The opportunities are filtered so only contacts related to open opportunities with a probability over 40% sync. They'd also like to sync their Chatter contacts, all future meetings, and all meetings from the last two months.

Set Up and Maintain Sales Tools

Salesforce for Outlook: Set up Sales Reps to Experience
Salesforce from Microsoft Outlook Using a Desktop-Based
Product

Sample Outlook Configuration for Account Executives:

```
Contacts
 Contacts on Opportunities: User's Records
  (Probability (%) greater than 40) AND (Stage not equal to Closed Won,Closed Lost
 Contacts on Accounts: User's Records
 Contacts in Chatter: Records User is Following

Events
 Events: User's Records
  Date greater or equal LAST 60 DAYS

Tasks
 Tasks: User's Records
  Date greater or equal LAST 60 DAYS
```

SEE ALSO:

Define Data Sets for Salesforce for Outlook

Check the Size of Salesforce for Outlook Data Sets

You can use the **Get Record Count** button to check how many records will sync for a sample
Salesforce for Outlook user based on the configuration's filters. If the numbers are too high or low,
you can adjust the filters and check the size again. The maximum record count is 5000 per object.

1. Define a data set for a configuration.

2. Under Data Set Size, click the lookup icon next to the `User` field.

3. Select a user. To test maximum size, choose a user who owns a lot of records, even one who
   may not be currently assigned to the configuration.

4. Click **Get Record Count**. The number of records that would sync between Outlook and
   Salesforce for that user appear.

5. Adjust the filters or selected user and retest the data set as needed. Nothing is saved until you
   click **Save**.

SEE ALSO:

Define Data Sets for Salesforce for Outlook

Track the Versions of Salesforce for Outlook Your Users Run

Quickly see which versions of Salesforce for Outlook your users are running from the Login History report.

1. From Setup, enter *Login History* in the Quick Find box, then select **Login History**.

2. See each user's version of Salesforce for Outlook in the Application and Client Version columns.

Email Application Publisher Layouts: Set Up Reps to Create Records Directly from Microsoft® Outlook® or Gmail™

Let Lightning for Outlook, Lightning for Gmail, or Salesforce for Outlook users create accounts, cases, leads, opportunities, and even custom objects directly from their email applications. Reps create records using actions menus, which you set up from Salesforce. Your Salesforce edition determines how you set up action menus and whether you can customize them.

You can set up action menus for reps working from Lightning for Outlook, Lightning for Gmail, and Salesforce for Outlook.
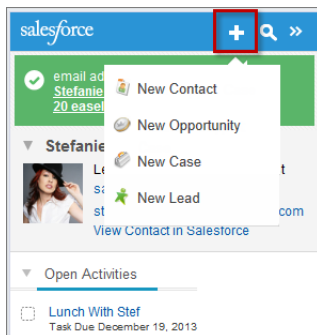
Follow these steps to set up action menus for reps to access from their email applications.

1. Create Quick Actions for Email Application Action Menus.

2. Add actions to the appropriate publisher layout.

    *   If you're working from Contact Manager, Group, or Professional Edition, Add Actions to Global Publisher Layout. These actions are display for all action menus that use the global publisher layout. However, reps see only `Create a Record` actions from their email applications.

    *   If you're working from Enterprise, Performance, Unlimited, or Developer Edition, you Customize Action Menus for Email Applications by creating publisher layouts specifically for email applications. You can create multiple layouts to give different reps access to different actions.

3. Give reps access to their action menus.

    *   If you're working from Contact Manager, Group, or Professional Edition, Assign Global Publisher Layouts to User Profiles.

    *   If you're working from Enterprise, Performance, Unlimited, or Developer Edition, Assign Email Application Publisher Layouts to User Profiles.

IN THIS SECTION:

Create Quick Actions for the Salesforce Side Panel Publisher

Take the first step in preparing your Salesforce for Outlook users to create records directly from the Salesforce Side Panel. You'll set up `Create a Record` global quick actions for each kind of record you want to appear in users' Side Panel Publisher menus.

Customize Email Application Action Menus

Take the second step in preparing reps to create records directly from Lightning for Outlook, Lightning for Gmail, or Salesforce for Outlook. You can create multiple layouts to give different reps access to different actions.

Enterprise, Performance, Unlimited, and Developer Editions let you customize the action menus for Outlook or Gmail using email application publisher layouts. After you've created the email application publisher layout, give your users access by assigning it to their user profiles.

Create Quick Actions for the Salesforce Side Panel Publisher

Take the first step in preparing your Salesforce for Outlook users to create records directly from the Salesforce Side Panel. You'll set up `Create a Record` global quick actions for each kind of record you want to appear in users' Side Panel Publisher menus.

The Salesforce Side Panel Publisher is a menu that lets users create accounts, cases, contacts, leads, opportunities or custom objects records directly from the side panel. You'll choose which quick actions appear in users' side panel publisher menus by creating global `Create a Record` actions for each kind of record.

> 📝 Note: You can use global actions for several types of publisher menus found in Salesforce, like the ones for the Home page or the Chatter tab. If you've already set up global `Create a Record` actions for the kinds of records you want available to your users, there's no need to set up the actions again—you'll find these actions already available to add to all publisher layouts.

If you haven't created global `Create a Record` actions for the kinds of records you want available to your users, you'll have to do so now.

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

2. Click **New Action**.

3. Select `Action Type`**Create a Record**.
    Only `Create a Record` actions appear in the side panel publisher menu.

4. Select a `Target Object` for the type of record you want available to users with this action.
    If the Target Object requires a `Record Type`, make sure that the users you'll assign to this action also have access to that record type.

5. Enter a `Label` for the new action that tells your users what it does.

6. Click **Save**.

7. From the Action Layout Editor, drag the fields you want to appear on the side panel publisher record detail page.
    If any of these fields are marked as required for this type of record elsewhere in your organization, make sure to include the fields in this action, too. This is because Salesforce won't let your users save records from the side panel publisher if the required fields aren't included in the record detail. The action layout editor displays red asterisks next to required fields.

After creating your `Create a Record` actions, the next step to setting up the side panel publisher for your users is to add your global actions to the appropriate side panel publisher layout. If you're working from Contact Manager, Group, or Professional Edition, Add Actions to Global Publisher Layout. If you're working from Enterprise, Performance, Unlimited, or Developer Edition, you Customize Action Menus for Email Applications by creating publisher layouts specifically for email applications.

SEE ALSO:

Customize Email Application Action Menus

Take the second step in preparing reps to create records directly from Lightning for Outlook, Lightning for Gmail, or Salesforce for Outlook. You can create multiple layouts to give different reps access to different actions.

Before you can customize email application action menus for your reps, make sure you Create Quick Actions for Email Application Action Menus.

Enterprise, Performance, Unlimited, and Developer Editions let you customize the action menus that display in your reps' email applications. You can do this by adding quick actions to email application publisher layouts. In addition, you can create multiple email application layouts so that reps with different job responsibilities can see only the quick actions that they need. For example, maybe your sales reps need to create contacts, leads, and opportunities, but your service reps need to create contacts and cases.

Follow these steps to customize action menus for email applications.

1. From Setup, use the `Quick Find` box to search for settings for your email integration feature. Search for Lightning for Outlook or Lightning for Gmail for those features. For Salesforce for Outlook, search for **Outlook Configurations**.

2. Under Email Application Publisher Layouts, click **New**. Give your new layout a name, and then click **Save**.

3. Drag the quick actions that you want into the Quick Actions in the Salesforce Classic Publisher section. For help using the publisher, see Add Actions to Global Publisher Layouts.

After you add actions to your email application publisher layout, the final step to setting up email application action menus is to give users access. If you're working from Enterprise, Performance, Unlimited, or Developer Edition, Assign Email Application Publisher Layouts to User Profiles.

SEE ALSO:

Email Application Publisher Layouts: Set Up Reps to Create Records Directly from Microsoft® Outlook® or Gmail™

Assign Email Application Publisher Layouts to User Profiles

Assign Email Application Publisher Layouts to User Profiles

Enterprise, Performance, Unlimited, and Developer Editions let you customize the action menus for Outlook or Gmail using email application publisher layouts. After you've created the email application publisher layout, give your users access by assigning it to their user profiles.

If you're working from Contact Manager, Group, or Professional Edition, Assign Global Publisher Layouts to User Profiles. For all other editions, assign Email Application Publisher Layouts by following these steps.

1. From Setup, use the `Quick Find` box to search for settings for your email integration feature. Search for Lightning for Outlook or Lightning for Gmail for those features. For Salesforce for Outlook, search for **Outlook Configurations**.

2. Under Email Application Publisher Layouts, click **Publisher Layout Assignment** > **Edit Assignment**.

3. Select a user profile by clicking anywhere on its row in the table.

4. From the Publisher Layout to Use drop-down, select the layout that you want to assign to the profile.

5. Click **Save**.

Connect for Outlook: (Retired)

Before you get interested in our retired, legacy Connect for Outlook product, we urge you to explore either our cloud- or desktop-based Microsoft integration products: Lightning for Outlook or Salesforce for Outlook.

⊘ **Important:** Effective Winter '16, we retired Connect for Outlook. This means the product no longer saves your emails or syncs your contacts, events, and tasks between Microsoft® Outlook® and Salesforce.

But don't worry! Become even more productive when you migrate to either Lightning for Outlook or Salesforce for Outlook. Team up with your Salesforce administrator to determine which product is best for you and your colleagues.

IN THIS SECTION:

How do I uninstall Connect for Outlook?

SEE ALSO:

https://help.salesforce.com/HTViewSolution?id=000204943

How do I uninstall Connect for Outlook?

Which Email Integration Product Is Right for My Company?

How do I uninstall Connect for Outlook?

⊘ **Important:** Effective Winter '16, we retired Connect for Outlook. This means the product no longer saves your emails or syncs your contacts, events, and tasks between Microsoft® Outlook® and Salesforce.

But don't worry! Become even more productive when you migrate to either Lightning for Outlook or Salesforce for Outlook. Team up with your Salesforce administrator to determine which product is best for you and your colleagues.

1. Close Microsoft® Outlook®.

2. In Windows®, open the Control Panel.

3. Select the option to uninstall programs.

4. Scroll to Salesforce Outlook Edition, and then follow the prompts to uninstall it.

SEE ALSO:

https://help.salesforce.com/HTViewSolution?id=000204943

Which Email Integration Product Is Right for My Company?

Set Up Voice

Voice allows users to access telephony features directly in Salesforce.

To use Voice in your org:

IN THIS SECTION:

1. Voice Prerequisites

   Plan out your implementation before enabling Voice in your organization.

2. Enable Voice

   Turn on Voice from the Voice Settings page in Lightning Experience.

3. Add Voice to the Utility Bar

   Use the App Manager to make Voice available from the utility bar at the bottom of the page. The utility bar gives your sales reps quick access to commonly used tools.

4. Create a Permission Set with Voice Features

   Assign the Voice app permissions with a custom permission set.

5. Assign the Voice Permission Set to Users

   Assign the Voice licenses to users from Setup.

6. How Do I Manage Voice Usage?

   See your org's Voice usage from Setup.

EDITIONS

Available in: Lightning Experience

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

Voice is available for an additional cost as an add-on license.

Voice Prerequisites

Plan out your implementation before enabling Voice in your organization.

Having a dedicated network for your Voice calls is best. We recommend having at least 10 kbps per Voice session available, but having 500 kbps+ per Voice session is optimal.

The supported browsers for Voice include the most recent versions of Chrome, Firefox, and Edge. You also need open ports on your computer and network firewalls for Voice to work. Make sure that the following ports aren't blocked:

- TCP: port 80 and 443
- UDP: all ports between 10,000 and 60,000

> 📝 **Note:** Voice should not be assigned to users already using Open CTI.
>
> To disable Open CTI for users, from Setup, enter `Users` in the `Quick Find` box, then select **Users**. Then deselect the `Call Center` field for Voice users.

The Voice product currently includes the following limitations:

- Voice features are available in Lightning Experience on the desktop only.
- Phone numbers in reports and dashboards can't be directly called with Voice.
- Outgoing calls are supported to the U.S. and Canada only.
- Every license is allowed one dedicated number. To change it, an admin can release the number, and the Voice user can then reassign themselves another number. Admins can release and replace, at most, a single number for each user each month.
- If your org has record types enabled for tasks, you need to assign the Log a Call quick action to a specific record type in order to log calls.
- Phone numbers are subject to availability, and numbers from all area codes may not be available.

Before beginning the implementation process, Salesforce must enable Voice permissions and provision Voice licenses for your organization. Your Salesforce contact coordinates it with you, but you can check if your organization has available Voice licenses. In Setup, enter `Company Information` in the Quick Find box, then select **Company Information**, and check for **Voice Outbound User**, **Voice Minutes**, and **Voice Inbound User** under Permission Set Licenses.

For information about using Voice in a sandbox environment, see Test Voice Features in Sandbox.

Enable Voice

Turn on Voice from the Voice Settings page in Lightning Experience.

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

2. Enable Voice.

   Optionally, enable personal voicemail and prioritized call lists for your org as well.

Add Voice to the Utility Bar

Use the App Manager to make Voice available from the utility bar at the bottom of the page. The utility bar gives your sales reps quick access to commonly used tools.

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

2. Edit an existing Lightning app or click **New Lightning App**. You can also upgrade a custom Classic app to a Lightning app.

   If available, the Lightning Sales app contains numerous options preconfigured for sales users.

3. On the Utility Bar tab, click **Add** and select **Voice**.

4. On the Assign to User Profiles tab, make the app available to relevant user profiles.

5. Verify the other app details, including the app name, branding information, and available menu items.

6. Save your changes.

To verify your changes, click the App Launcher and select the app that has Lightning Voice enabled.

Create a Permission Set with Voice Features

Assign the Voice app permissions with a custom permission set.

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

2. Click **New**.

3. Enter a name for the permission set.

   Naming it `Voice` makes it easy to identify.

   > 📝 Note: The `License` dropdown should have **None** selected. Don't select a specific user license for the permission set.

4. Click **Save**.

5. Click **App Permissions**.

6. Click **Edit**.

7. Select **Access Voice Minutes**, **Access Voice Outbound Calls**, and (if available) **Access Voice Inbound Calls**.

8. Click **Save**.

If your Voice users have custom profiles, they won't be able to assign themselves phone numbers without the **View Setup and Configuration** permission. Enable it through the custom profile or Voice permission set under **Administrative Permissions** or **System Permissions**.

Assign the Voice Permission Set to Users

Assign the Voice licenses to users from Setup.

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

2. Select a user.

3. In the Permission Set License Assignments related list, click **Edit Assignments**.

4. Assign the Voice Minutes, Voice Outbound User, and (if available) Voice Inbound User licenses and click **Save**.

5. In the Permission Set Assignments related list, click **Edit Assignments**.

6. Add the Voice permission set under Enabled Permission Sets and click **Save**.

7. Repeat the process for other users you want to grant Voice access to.

   The number of permission sets you can assign is limited by the number of feature licenses you've purchased.

How Do I Manage Voice Usage?

See your org's Voice usage from Setup.

From Setup, enter *Usage Report* in the `Quick Find` box, then select **Usage Report**.

The page displays your org's total minutes used this month and last month. You can view usage by date, and also sort and filter the usage data.

IN THIS SECTION:

[Release a Voice Number](#)

Release a number from the Number Management page in Setup.

[Test Voice Features in Sandbox](#)

Test Voice in a sandbox environment by re-enabling the feature in a full sandbox org. Calls placed in a sandbox are test calls, and phone numbers aren't actually dialed.

[Voice Troubleshooting Tips](#)

Make sure your environment is set up to use Voice, and you have the most recent version of Chrome, Firefox, or Edge.

Release a Voice Number

Release a number from the Number Management page in Setup.

Once you release a number, it can't be recovered. You can still access calling data, but you can't make calls with the number. Admins can release, at most, a single number for each user each month.

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

2. Click ▼ next to a number.

3. Click **Release**.

Test Voice Features in Sandbox

Test Voice in a sandbox environment by re-enabling the feature in a full sandbox org. Calls placed in a sandbox are test calls, and phone numbers aren't actually dialed.

If you have an org with Voice enabled, you can test some Voice features in a sandbox environment. You can place fake outbound calls in sandbox. Inbound calls are not supported.

1. Create a full sandbox of your Voice org.

2. Log in to your sandbox.

3. From Setup, enter `Voice Settings` in the `Quick Find` box, then select **Voice Settings**.

4. Toggle the Voice setting off, then back on again.

5. Finish setting up Voice in your sandbox org.

   If you haven't finished setting up Voice, this includes adding Voice to the utility bar, creating a Voice permission set, and assigning the permission set to users.

   📝 **Note:** When selecting phone numbers in sandbox, each user can choose from the same list of dummy numbers. An error may occur if multiple users are assigned to the same phone number.

Voice Troubleshooting Tips

Make sure your environment is set up to use Voice, and you have the most recent version of Chrome, Firefox, or Edge.

Problem	Potential Solutions
I can't make a call.	- Make sure you have a network connection. - Make sure you've granted your browser permission to access your microphone. - Check that Voice is properly set up in your org. For more information about initial set up, see "Voice Prerequisites" in the Salesforce Help.
The audio is dropping in-and-out of my call.	Check the quality of your network connection. It's best to use a high speed or separate network for calling activity, or to prioritize Voice traffic on your network.
I'm getting one-way audio (on either end).	- Make sure your microphone and speaker are attached and enabled, and that your microphone isn't muted. - Check that you have opened the correct ports in your computer and network firewalls.

Problem	Potential Solutions
The audio quality is poor on my call.	• Use a wired USB headset over wireless or mobile headphones. • Try to reduce the noise in your area, and take calls in a quiet location. • Adjust the microphone and speaker volume settings. • If you're using a wireless connection, switch to a hardwired connection with adequate bandwidth. • Close extra applications and browser tabs to make sure your computer has enough resources to make a quality call.

Set Up Work.com

Work.com Implementation Overview

Work.com is a suite of sales-management and service-management tools that help managers and teams learn faster and perform better.

Work.com has various features to help your sales and service teams. This includes recognition tied to real rewards, detailed goals and real-time coaching, and full-featured performance reviews.

After you receive your Work.com licenses, you'll need to set up Work.com by performing the following activities.

- Assign a Work.com administrator to complete the setup process.
- Enable preferences for Work.com features.
- Set up permissions to Work.com features with profiles or permission sets.
- Assign Work.com licenses to users.
- Configure Work.com features for your organization.

SEE ALSO:

    Prerequisites

    Assign a Work.com Administrator

    Enable Work.com Features

    Work.com Feature Access

    Work.com License Types

    Work.com Feature Overview

EDITIONS

Available in: Salesforce Classic

Work.com is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

Prerequisites

To enable Work.com features:	"Customize Application"
To assign permission sets:	"Assign Permission Sets"
To assign profiles:	"Manage Users"
To set field-level security:	"Manage Profiles and Permission Sets"
	AND
	"Customize Application"
To view the Calibration tab:	"Enable Work.com Calibration"

Plan out your implementation before enabling Work.com in your organization.

Administrators should make the decisions outlined in the Business Decision Checklist before enabling Work.com.

Before beginning the implementation process, Salesforce must enable Work.com permissions and provision Work.com licenses for your organization. Your Salesforce contact will coordinate this with you, but you can check if your organization has available Work.com licenses. In Setup, enter `Company Information` in the `Quick Find` box, then select **Company Information**, and check for Work.com User under **Feature Licenses**.

> **Note:** We recommend that you enable Chatter regardless of the edition your org is using. Many Work.com features use the Chatter feed to notify and interact with users. To confirm that Chatter is enabled, from Setup, enter `Chatter Settings` in the `Quick Find` box, then select **Chatter Settings**, and verify that Chatter Settings is enabled.

SEE ALSO:

Assign a Work.com Administrator

Enable Work.com

Assign a Work.com Administrator

Before enabling Work.com in your organization, you must assign a Work.com user feature license to the person who will be the system administrator and responsible for setting up Work.com for your organization.

If you're the administrator setting up Work.com, assign the license to yourself.

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

2. Find the name of the person who will be the system administrator and click **Edit** next to their name.

3. In the right-hand column, select the **Work.com User** checkbox.

4. Click **Save**.

We strongly recommend that you create a separate Work.com Administrator profile with limited access because the standard Salesforce System Administrator profile is so powerful. For more information, see the Create Your Work.com Administrator Profile.

SEE ALSO:

Enable Work.com Features

Enable Work.com Features

Administrators can enable preferences for Work.com features on the Work.com Settings page.

All the settings except for Thanks Settings and Skills Settings require a Work.com license.

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

2. Select the Work.com features you want to enable:

   For users that purchased Work.com prior to the Spring '15 release, the features that appear differ depending on whether you have add-on licenses to **Work.com Motivate, Work.com Align**, or **Work.com Perform**.

Feature	Section	Description
Enable Thanks	**Thanks Settings**	Enable Thanks to allow users to recognize others with thanks badges on the Chatter feed.
		If you disable this setting, users no longer see the Thanks action in the Chatter publisher. However, they can still see previously created Thanks posts.
Restrict Custom Badge Creators	**Thanks Settings**	By default, all users can create custom badges. This setting restricts badge creation to users that have the "Create" permission on the Reward object.

Feature	Section	Description
Enable Rewards	**Recognition Settings**	Enable Rewards to tie tangible rewards to badges. Reward creators can upload gift codes to create Reward funds. See the "Reward Funds" topic for more information about creating rewards.
Enable Manager Groups for Coaching	**Coaching Settings**	Enable manager groups to give managers access to the coaching spaces of the users that report to them. To enable this setting, the Manager Groups setting must first be enabled in Setup, under **Sharing Settings**.
Enable Manager Groups for Goals	**Goal Settings**	Enable manager groups to give managers access to the goals of the users that report to them. To enable this setting, the Manager Groups setting must first be enabled in Setup, under **Sharing Settings**.
Enable Calibration	**Perform Settings**	Enable Calibration to see and update performance across teams and individuals. 📝 Note: For **Performance Edition** organizations, Calibration is not available for the following profiles: Contract Manager, Marketing User, Read Only, and Solution Manager.
Enable Skills	**Skills Settings**	Enable Skills to allow users to add skills to their profiles and endorse the skills of other users. Enabling this setting replaces the Knowledgeable About widget on Chatter profiles.
Restrict Skill and Endorsement Editing to Record Detail Pages	**Skills Settings**	Disables inline editing of skills and endorsements on Chatter profiles, and restricts editing to record detail pages. Recommended if you have customized these objects with custom required fields. 📝 Note: Don't enable this setting if you want to use skills in Chatter profiles.
Enable Automatic Skill Feed Posts	**Skills Settings**	Enable to automatically create Chatter feed posts when a user adds a new skill.
Enable Suggested Skills	**Skills Settings**	Enable Suggested Skills to have the skills widget suggest skills for users to add based on their Chatter Topics activity.

3. Click **Save**.

SEE ALSO:

Work.com Feature Access

Work.com Feature Access

Once Work.com is enabled for your organization, grant users access to Work.com features using either profiles or permission sets.

Administrators can grant users access to Work.com features with either profiles or permission sets.

📝 **Note:** Professional Edition organizations will need to grant access through existing profiles.

- A profile contains user permissions and access settings that control what users can do within their organization. Each user can only have one profile. Refer to Recommended Work.com Profiles for more information about creating profiles.
- A permission set is a collection of settings and permissions that gives users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Refer to Recommended Work.com Permission Sets for more information about creating the proper permission sets.

If your organization has provisioned Work.com Only user licenses, they come with a standard Work.com Only profile. Keep in mind that you can't modify the standard profile, but you can clone it and modify the cloned profile.

SEE ALSO:

Recommended Work.com Permission Sets

Assign Work.com Permission Sets

Recommended Work.com Profiles

Assign Work.com Profiles

Work.com License Types

Assign Work.com Permission Sets

Assign permission sets with Work.com access to your users from Setup.

Before you can assign permission sets to your users, you must create permission sets with Work.com access. Refer to Recommended Work.com Permission Sets for more information.

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

2. Select a user.

3. In the Permission Set Assignments related list, click **Edit Assignments**.

4. To assign a permission set, select it from the Available Permission Sets box and click **Add**. To remove a permission set assignment, select it from the Enabled Permission Sets box and click **Remove**.

   You can also assign permission sets to many users at the same time. For more information, see "Assign a Permission Set to Multiple Users" in the Salesforce Help.

   📝 **Note:** Some permissions require users to have a permission set license before you can grant the permissions. For example, if you add the "Use Identity Connect" user permission to the Identity permission set, you can assign only users with the Identity Connect permission set license to the permission set.

5. Click **Save**.

Assign Work.com Profiles

Assign profiles with Work.com access to your users from Setup.

Before you can assign profiles to your users, you must create profiles with Work.com access. Refer to Recommended Work.com Profiles for more information.

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

2. Click **Edit** next to a user.

3. From the **Profile** drop-down, select the profile you would like to assign.

4. Click **Save**.

Work.com License Types

After granting access to Work.com features with permission sets or profiles, assign users a Work.com license.

Work.com has two types of licenses.

*   Work.com Only user licenses are for users who don't have a Salesforce license and will only use the Work.com features in your organization.

    📝 Note: Work.com Only user licenses have limited administrator functionality. Assign Work.com User Feature licenses instead for users who will be administering performance summary cycles or other Work.com features.

*   Work.com User Feature licenses are for users who also have a Salesforce license.

You may want to configure Work.com features before assigning licenses to all users. For example, you may want to initially limit licenses to Work.com administrators to avoid exposing certain features prior to your launch date.

SEE ALSO:

Assign Work.com Only User Licenses

Assign Work.com User Feature Licenses

Work.com Feature Overview

Assign Work.com Only User Licenses

Assign a Work.com Only license to users who don't have a Salesforce license and will only use Work.com.

Work.com Only user licenses have limited administrator functionality. Assign Work.com User Feature licenses instead for users who will be administering performance summary cycles or other Work.com features.

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

2. Click **Edit** next to a user.

3. From the **User License** drop-down, select **Work.com Only**.

4. Click **Save**.

SEE ALSO:

Work.com License Types

Assign Work.com User Feature Licenses

Assign Work.com User Feature Licenses

Assign a Work.com User Feature license to users who also have a Salesforce license.

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

2. Click **Edit** next to a user.

3. In the right-hand column, select the **Work.com User** checkbox.

4. Click **Save**.

SEE ALSO:

Work.com License Types

Assign Work.com Only User Licenses

Configure Work.com Features

Work.com Feature Overview

Most Work.com features require the Work.com add-on, but some are freely available to Sales Cloud users.

Users can access the Skills and Thanks features (excluding Rewards) without Work.com. Other features require the Work.com add-on.

Table 8: Work.com Features Available

Feature	Requires Work.com Add-On
Recognition: Create and give thanks badges	
Recognition: Create and give rewards badges	✅
Skills: Share and endorse skills	
Goals: Define and track your work	✅
Coaching: Give real-time coaching	✅
Feedback: Give and offer feedback	✅
Performance: Track performance data	✅
Calibration: Visualize and change performance data	✅

📝 **Note:** We recommend that you enable Chatter regardless of the edition your org is using. Many Work.com features use the Chatter feed to notify and interact with users. To confirm that Chatter is enabled, from Setup, enter `Chatter Settings` in the `Quick Find` box, then select **Chatter Settings**, and verify that Chatter Settings is enabled.

You can customize where different tabs, such as Goals and Feedback, appear within the Work.com app and on user profiles. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps** and make changes to the desired apps and subtab apps. For more information, see Managing Subtab Apps in the Salesforce Help.

SEE ALSO:

    Work.com Implementation Overview

    Thanks and Skills Features

    Goals and Coaching Features

    Performance Summary and Calibration Features

    Work.com Report and Dashboard Overview

Thanks and Skills Features

Set up Thanks and Skills features by configuring thanks in the Chatter publisher and assigning a publisher layout to profiles.

Make sure you've enabled the desired Thanks and Recognition features prior to configuring them. From Setup, enter "Work.com Settings" in the `Quick Find` box, then select **Work.com Settings** and enable the relevant settings.

For detailed information about creating rewards, refer to Reward Funds in the Salesforce Help. Additionally, information about customizing skills can be found in the Skills Customization topic.

SEE ALSO:

    Work.com Feature Overview

    Configure Thanks in the Chatter Publisher and Salesforce1 Action Bar

    Assign Publisher Layout to Profiles

EDITIONS

Available in: Salesforce Classic

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

Configure Thanks in the Chatter Publisher and Salesforce1 Action Bar

You can change the position of the Thanks action in the Chatter publisher and the Salesforce1 action bar, or even hide Thanks for specific profiles.

To modify the Chatter publisher, actions in the publisher must be enabled.

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

2. Confirm that `Enable Actions in the Publisher` is selected in the Actions in the Publisher section. If it isn't enabled, click **Edit**, select `Enable Actions in the Publisher`, and click **Save**.

3. From Setup, enter `Publisher Layouts` in the `Quick Find` box, then select **Publisher Layouts**.

4. Click **Edit** next to the Global Publisher Layout.

5. Drag the **Thanks** action to where you want it to appear in the Chatter publisher or the Salesforce1 action bar.

6. Click **Save**.

You can hide Thanks for specific users by changing profile visibility settings.

SEE ALSO:

[Thanks and Skills Features](#)

[Assign Publisher Layout to Profiles](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up actions:
- "Customize Application"

Assign Publisher Layout to Profiles

Assign the publisher layout with Thanks to user profiles. People with these profiles can thank their coworkers directly from the publisher.

If not everyone in your organization should have this feature, create another layout without Thanks and assign it to a profile. People with that profile won't see Thanks in their publisher.

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

2. Click **Publisher Layout Assignment**.

3. Click **Edit Assignment**.

4. Select a user profile by clicking anywhere on its row in the table.

5. From the Publisher Layout to Use drop-down, select the global publisher layout that you want to assign to the highlighted profile.

6. Save the layout.

SEE ALSO:

[Thanks and Skills Features](#)

[Configure Thanks in the Chatter Publisher and Salesforce1 Action Bar](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up quick actions:
- "Customize Application"

Goals and Coaching Features

Enable feed and history tracking to further track goals and coaching.

📝 **Note:** Enable Chatter in your organization before configuring Goals and Coaching features.

Feed tracking lets users see Chatter feed updates for any relevant changes. History tracking lets you track changes to critical fields. We recommend that you track changes for Goal, Metric, and Coaching objects.

Surface key company goals to give all employees visibility into company-wide goals.

For additional information about creating an overall Goals strategy for your organization, see the Goals Strategy Guide.

SEE ALSO:

> Work.com Feature Overview
>
> Enable Feed Tracking for Goals
>
> Enable Feed Tracking for Coaching
>
> Enable Feed Tracking for Metrics
>
> Enable History Tracking for Goal Fields
>
> Enable History Tracking for Coaching Fields
>
> Enable History Tracking for Metric Fields
>
> Configure Key Company Goals

Enable Feed Tracking for Goals

Track updates for goals so users can receive notifications about important changes.

Determine which goal updates should notify people and select the associated fields for tracking.

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

2. Click on the Goal object.

3. Click the **Enable Feed Tracking** checkbox.

4. Select the fields you would like to track.

    💡 **Tip:** For goals, it's helpful to track Completion Date, Due Date, Owner Name, Progress, and All Related Objects.

5. Click **Save**.

SEE ALSO:

> Goals and Coaching Features
>
> Enable Feed Tracking for Coaching
>
> Enable History Tracking for Goal Fields
>
> Enable History Tracking for Coaching Fields
>
> Configure Key Company Goals

Enable Feed Tracking for Coaching

Track updates for coaching spaces, so users can receive notifications about important changes.

Determine which coaching updates should notify people and select the associated fields for tracking.

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

2. Click on the Coaching object.

3. Click the **Enable Feed Tracking** checkbox.

4. Select the fields you would like to track.

    💡 Tip: For coaching, it's helpful to track Inactive and All Related Objects.

5. Click **Save**.

SEE ALSO:

Goals and Coaching Features

Enable Feed Tracking for Goals

Enable History Tracking for Goal Fields

Enable History Tracking for Coaching Fields

Configure Key Company Goals

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize fields tracked in feeds:
- "Customize Application"

Enable Feed Tracking for Metrics

Track updates for goals so users can receive notifications about important changes.

Determine which metric updates should notify people and select the associated fields for tracking.

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

2. Click on the Metric object.

3. Click the **Enable Feed Tracking** checkbox.

4. Select the fields you would like to track.

    💡 Tip: For metrics, it's helpful to track Comment, Completion Date, Current Value, Due Date, Goal, Initial Value, Owner Name, Status, Target Value, and All Related Objects.

5. Click **Save**.

SEE ALSO:

Goals and Coaching Features

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize fields tracked in feeds:
- "Customize Application"

Enable History Tracking for Goal Fields

Track changes to the Goal object for auditing purposes.

We recommend tracking the Completion Date, Due Date, Owner Name, Progress, Start Date, Status, and Description fields.

1. From the object management settings for goals, go to the fields area.

2. Click **Set History Tracking**.

3. Select up to 20 fields to track.

4. Click **Save**.

SEE ALSO:

    Goals and Coaching Features

    Enable Feed Tracking for Goals

    Enable Feed Tracking for Coaching

    Enable History Tracking for Coaching Fields

    Configure Key Company Goals

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up which fields are tracked:

- "Customize Application"

Enable History Tracking for Coaching Fields

Track changes to the Coaching object for auditing purposes.

We recommend tracking the Coach, Inactive, Owner Name, and Person Coached fields.

1. From the object management settings for goals, go to the fields area.

2. Click **Set History Tracking**.

3. Select up to 20 fields to track.

4. Click **Save**.

SEE ALSO:

    Goals and Coaching Features

    Enable Feed Tracking for Goals

    Enable Feed Tracking for Coaching

    Enable History Tracking for Goal Fields

    Configure Key Company Goals

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up which fields are tracked:

- "Customize Application"

Enable History Tracking for Metric Fields

Track changes to the Metric object for auditing purposes.

We recommend tracking the Comment, Completion Date, Current Value, Due Date, Goal, Initial Value, Owner Name, Status, Target Value, Weight, and Description fields.

1. From the object management settings for metrics, go to the fields area.

2. Click **Set History Tracking**.

3. Select up to 20 fields to track.

4. Click **Save**.

SEE ALSO:

    Goals and Coaching Features

Configure Key Company Goals

Key company goals give everyone in your organization visibility into a company-wide goal after you grant sharing access from the goal's detail page. Work.com administrators and people who have been granted access have the ability to create key company goals.

Alternatively, you can also set field-level security using permission sets.

1. From the object management settings for goals, go to the fields area.

2. Click on the **Key Company Goal** field label.

3. Click **Set Field-Level Security**.

4. Ensure the **Visible** checkbox is selected for all profiles with goals access.

5. Ensure the **Read-Only** checkbox is not selected for profiles that should be able to create key company goals.

6. Click **Save**.

SEE ALSO:

    Goals and Coaching Features

    Enable Feed Tracking for Goals

    Enable Feed Tracking for Coaching

    Enable History Tracking for Goal Fields

    Enable History Tracking for Coaching Fields

Performance Summary and Calibration Features

Set up Calibration reports to compare and update performance ratings in your organization.

Work.com performance summaries gather feedback about people in your organization with a custom questionnaire. You can create, deploy, and share different performance summaries across your organizations by managing performance summary cycles. Once users have submitted performance summary details, you can see and update performance ratings across the organization with the Calibration feature.

You can create and deploy performance summary cycles from the **Performance Cycles** tab. Users with the Performance Cycle Manager permission set or profile will be able to access the **Performance Cycles** tab.

For detailed information about creating and deploying performance summary cycles, refer to Performance Summary Cycles Overview in the Salesforce Help. For more information about the Calibration feature, refer to the Calibration Overview topic.

SEE ALSO:

> Work.com Feature Overview
>
> Set Up Calibration Reports

Set Up Calibration Reports

Calibration reports are populated with data from performance summary cycles. They are designed for managers and executives to review overall performance of their teams or organizations. Before using the Calibration feature, you must create a report that loads the performance summary data.

Define your own calibration report or download the calibration reports package from the Package Installation page.

- Production Calibration Report Package
- Sandbox Calibration Report Package

1. On the Calibration tab, select a calibration report from the drop-down list.

2. Click **View/Edit Report**.

3. Click **Save As**.

4. Type a name, an optional description, unique name, and specify the report folder.

   If the report is saved to a public folder, anyone with permission to view the folder sees this report, but each user will only see performance summaries they have access to. If the report is saved to "My Personal Custom Reports," only you will see the Calibration report.

5. Click **Save & Return to Report**.

   💡 Tip: You can also create a new report. Once a report meets specific criteria, it automatically appears in the Calibration drop down.

   - The report must be a **Work.com Calibration** report type.
   - The report must be in a **Summary Format**, grouped by Feedback Question Name and then by Feedback.
   - These columns should be listed in the report:
     - Performance Cycle ID
     - Feedback Request ID

- Feedback ID
- Subject: User ID
- Subject: Full Name (or Subject: First Name and Subject: Last Name)

- The report must be filtered to only view one performance summary cycle.

Once you've downloaded the package or created a report that meets the criteria, it automatically appears in the Calibration drop-down.

SEE ALSO:

Performance Summary and Calibration Features

Configure Work.com Reports

Work.com Report and Dashboard Overview

Use reports and dashboards to see how Work.com features are being used in your organization.

Salesforce reports and dashboards are available for all Work.com users. Administrators should install the reporting package that applies to their Work.com edition. The Work.com reporting package contains:

- Custom report types for Work.com objects
- Custom fields for Work.com objects
- Example dashboards

Install one of the following packages based on the Work.com edition you purchased. For example, if your organization has Work.com Align, only install the Align package. Refer to your product contract to confirm which Work.com edition you have.

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

> **Note:**
> - Make sure you've enabled the features related to your Work.com edition prior to installing the package. The package will only install correctly if you've enabled the features beforehand.
> - If you purchased Work.com after the Spring '15 release, install the Work.com Perform package.
> - It is not possible or necessary to install all the packages.

Production Packages:

- Work.com Motivate
- Work.com Align
- Work.com Perform
- Thanks and Skills Reports and Dashboards

Sandbox Packages:

- Work.com Motivate
- Work.com Align
- Work.com Perform

- Thanks and Skills Reports and Dashboards

SEE ALSO:

Work.com Implementation Overview

Work.com Feature Overview

Work.com Report and Dashboard Details

Work.com Report and Dashboard Details

The Work.com reports and dashboards included in the reporting package are a good starting point. Use these examples to create reports and dashboards that are useful to your organization.

Work.com Perform Package Reports

These reports are available after installing the Work.com Perform package. Work.com reports are organized in folders based on features:

- Work.com Coaching Reports
- Work.com Goal Reports
- Work.com Performance Summary Reports
- Work.com Recognition Reports
- Work.com Skills Reports

Table 9: Work.com Coaching Reports

Report Name	Description
Coaching Activities (Tasks and Events)	Tasks and events related to coaching spaces
Coaching Activities Team - Last 30 Days	Coaching activities of your team over the last 30 days
Coaching Activity Last 30 Days	Coaching activities over the last 30 days sorted by department
Coaching Coverage Report	The percentage of users that have coaching spaces by department
Coaching Events by Relationship	Events related to coaching spaces
Coaching Relationships	All coaching spaces in your organization

Table 10: Work.com Goal Reports

Report Name	Description
All Goals	All goals in your organization
All Metrics	All metrics in your organization
Goals Created by Date	Goals sorted by the date they were created
Key Company Goal Progress	Key company goals, their status, and other details
Metrics Flagged as Behind or Critical	Metrics with a Status of Behind or Critical

Report Name	Description
Stale Goals	Goals that haven't been modified in 30 days
Work.com Team Goals Progress	Your team's goals and their progress

Table 11: Work.com Performance Summary Reports

Report Name	Description
All Active Users with a Manager	All active users with a manager in your org
Manager Questions - X	The manager questions asked in a performance summary
Performance Answers by Question - Q1	Sample report for tracking performance cycle activity
Performance Answers by Question - Q3	Sample report for tracking performance cycle activity
Performance Summaries by Department	Performance summaries grouped by department
Performance Summaries with Answers - Q1	Sample report for tracking performance cycle activity
Performance Summaries with Answers - Q3	Sample report for tracking performance cycle activity
Performance Summary Cycle Status Update	The request status across different performance summaries
Self Summary Questions - X	The questions asked in self summaries
Summary Cycle Details	The percentage of participants per performance cycle
Summary Cycle Details - Submitted	The percentage of submitted requests per performance cycle

Table 12: Work.com Recognition Reports

Report Name	Description
Badges Given - By Date Given	Thanks badges given grouped by the date each badge was given
Breakdown of Badges Given	Thanks badges given grouped by individual badges and the role of the badge giver
Breakdown of Badges Received	Thanks badges received grouped by individual badges and the role of the badge recipient
Reward Funds Given	The amount of each reward fund that has been distributed
Reward Funds Remaining	The amount of each reward fund that is still remaining
Thanks by Giver	Thanks badges given by each user
Thanks Given - Recipient Data	Thanks badges received by each user
Thanks Received by Role	Thanks badges received by each role

Table 13: Work.com Skills Reports

Report Name	Description
Most Endorsed People	Users with the most skill endorsements
Most Skilled People	Users with the most associated skill records
New Skill Creation By Date	Skills arranged by the date they were created
Skill Endorsements By Date	Endorsements arranged by the date they were created
Skills Added To Profiles By Date	Skills arranged by the date they were associated with different user profiles
Top Skills	Skills arranged by the number of people with the skill

Work.com Perform Package Dashboards

These dashboards are available after installing the Work.com Perform package:

- Work.com Coaching Dashboards
- Work.com Performance Summary Dashboards
- Work.com Recognition Dashboards
- Work.com Skills Dashboards

Table 14: Work.com Coaching Dashboards

Report Name	Description
Company Coaching Dashboard	Displays coaching coverage and activity across your company
Company Goals Dashboard	Displays Key Company Goals and the number of goals created
Manager Coaching Dashboard	Displays coaching and goals related to your team

Table 15: Work.com Performance Summary Dashboards

Report Name	Description
Performance Cycle Dashboard	Displays statistics about the participants, questions, and progress of a specific performance cycle

Table 16: Work.com Recognition Dashboards

Report Name	Description
Recognition Dashboard	Displays badge statistics and users giving and receiving badges
Recognition with Rewards Dashboard	Displays badge and rewards statistics and users giving and receiving badges

Table 17: Work.com Skills Dashboards

Report Name	Description
Skills Dashboard	Displays skills statistics for your organization

SEE ALSO:

[Work.com Report and Dashboard Overview](#)

Recommended Work.com Permission Sets

Create different permission sets for different types of Work.com users.

Create new permission sets for each type of Work.com user.

[Walk Through It: create, edit, and assign a permission set](#)

Use the tables below to assign the appropriate object settings and system permissions for each permission set.

Standard User

The Standard User permission set gives a user all the basic Work.com functionality.

Table 18: Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Available ✅ Visible ✅						
Coaching (object)		✅	✅	✅			
Coaching (tab)	Available ✅ Visible ✅						
Documents		✅	✅	✅			
Endorsements		✅	✅	✅	✅		
Feedback (object)		✅	✅	✅	✅		
Feedback Questions		✅	✅	✅			
Feedback Question Sets		✅	✅	✅			
Feedback Requests (and Feedback tab)	Available ✅ Visible ✅	✅	✅	✅			

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Goal Links		✅	✅	✅	✅		
Goals (object)		✅	✅	✅	✅		
Goals (Completion Date field)		✅					
Goals (Key Company Goal field)		✅					
Goals (tab)	Available ✅ Visible ✅						
Metric Data Links		✅	✅	✅	✅		
Metrics		✅	✅	✅	✅		
Performance Cycles	Available ✅ Visible ✅	✅					
Recognition (tab)	Available ✅ Visible ✅						
Reward Funds	Available ✅ Visible ✅	✅					
Reward Fund Types	Available ✅ Visible ✅	✅					
Rewards		✅					
Skills	Available ✅ Visible ✅	✅	✅				
Skill Users		✅	✅	✅	✅		

Table 19: Standard User System Permissions

System Permissions	Enabled
API Enabled	✅
Edit Events	✅

System Permissions	Enabled
Edit Tasks	✅

Performance Cycle Manager

The Performance Cycle Manager permission set is typically used for creating and deploying performance summaries to employees.

📝 **Note:** This permission set should be assigned in addition to the Standard User permission set.

Table 20: Performance Cycle Manager Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Calibration (tab)	Available ✅ Visible ✅						
Feedback (object)		✅	✅	✅	✅	✅	✅
Feedback Questions		✅	✅	✅	✅	✅	✅
Feedback Question Sets		✅	✅	✅	✅	✅	✅
Feedback Requests (and Feedback tab)	Available ✅ Visible ✅	✅	✅	✅	✅	✅	✅
Performance Cycles	Available ✅ Visible ✅	✅	✅	✅	✅	✅	✅

Table 21: Performance Cycle Manager System Permissions

System Permissions	Enabled
Enable Work.com Calibration	✅
View Setup and Configuration	✅

Custom Badge Creator

The Custom Badge Creator permission set gives users the ability to create custom badges.

📝 **Note:**

- If the Restrict Custom Badge Creators preference is enabled, users must also have Create enabled on the Reward object.
- This permission set should be assigned in addition to the Standard User permission set.

Table 22: Custom Badge Creator System Permissions

System Permissions	Enabled
Create custom Badge Definitions	✅
Moderate Chatter	✅

Reward Creator

The Reward Creator permission set is for users who should have the ability to link badges to tangible rewards.

📝 **Note:** This permission set should be assigned in addition to the Standard User permission set.

Table 23: Reward Creator Object Settings

Object Name	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Reward Funds	✅	✅	✅	✅		
Reward Fund Types	✅	✅	✅	✅		
Rewards	✅	✅	✅	✅		

Table 24: Reward Creator System Permissions

System Permissions	Enabled
Create custom Badge Definitions	✅

Work.com Administrator

The Work.com Administrator permission set gives a user full administrative access to Work.com objects and features. This permission set should be assigned instead of the Standard User permission set.

Table 25: Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Available ✅ Visible ✅						
Calibration (tab)	Available ✅ Visible ✅						
Coaching (object)		✅	✅	✅	✅	✅	✅

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Coaching (tab)	Available ✅ Visible ✅						
Documents		✅	✅	✅	✅	✅	✅
Endorsements		✅	✅	✅	✅	✅	✅
Feedback (object)		✅	✅	✅	✅	✅	✅
Feedback Questions		✅	✅	✅	✅	✅	✅
Feedback Question Sets		✅	✅	✅	✅	✅	✅
Feedback Requests (and Feedback tab)	Available ✅ Visible ✅	✅	✅	✅	✅	✅	✅
Goal Links		✅	✅	✅	✅	✅	✅
Goals (object)		✅	✅	✅	✅	✅	✅
Goals (Completion Date field)		✅					
Goals (Key Company Goal field)		✅		✅			
Goals (tab)	Available ✅ Visible ✅						
Metric Data Links		✅	✅	✅	✅	✅	✅
Metrics		✅	✅	✅	✅	✅	✅
Performance Cycles	Available ✅ Visible ✅	✅	✅	✅	✅	✅	✅
Recognition (tab)	Available ✅ Visible ✅						
Reward Funds	Available ✅ Visible ✅	✅	✅	✅	✅	✅	✅
Reward Fund Types	Available ✅ Visible ✅	✅	✅	✅	✅	✅	✅

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Rewards		✔	✔	✔	✔	✔	✔
Skills	Available ✔	✔	✔	✔	✔	✔	✔
	Visible ✔						
Skill Users		✔	✔	✔	✔	✔	✔

Table 26: Work.com Administrator System Permissions

System Permissions	Enabled
API Enabled	✔
Create custom Badge Definitions	✔
Edit Events	✔
Edit Tasks	✔
Enable Work.com Calibration	✔
Moderate Chatter	✔
View Setup and Configuration	✔

SEE ALSO:

Work.com Feature Access

Assign Work.com Permission Sets

Recommended Work.com Profiles

Create different profiles for different types of Work.com users.

Create a new profile for each type of Work.com user. For more information about creating profiles, see either Work in the Original Profile Interface or Work in the Enhanced Profile User Interface Page depending on whether you have the Enable Enhanced Profile User Interface preference turned on.

📝 Note: Professional Edition organizations will need to grant access through existing profiles. The Work.com Only User, Chatter Only User, and Standard User profiles grant basic access to Work.com objects. The System Administrator profile grants users full administrative access to all Work.com features.

Use the tables below to assign the appropriate object settings and system permissions for each profile.

EDITIONS

Available in: Salesforce Classic

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

Standard User

The Standard User profile gives a user all the basic Work.com functionality.

Table 27: Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Coaching (object)		✅	✅	✅			
Coaching (tab)	Default On						
Documents		✅	✅	✅			
Endorsements		✅	✅	✅	✅		
Feedback (object)		✅	✅	✅	✅		
Feedback Questions		✅	✅	✅			
Feedback Question Sets		✅	✅	✅			
Feedback Requests (and Feedback tab)	Default On	✅	✅	✅			
Goal Links		✅	✅	✅	✅		
Goals (object)		✅	✅	✅	✅		
Goals (Completion Date field)		✅					
Goals (Key Company Goal field)		✅					
Goals (tab)	Default On						
Metric Data Link		✅	✅	✅	✅		
Metrics		✅	✅	✅	✅		
Performance Cycles	Default On	✅					
Recognition (tab)	Default On						
Reward Funds	Default On	✅					
Reward Fund Types	Default On	✅					
Rewards		✅					
Skills	Default On	✅	✅				

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Skill Users		✅	✅	✅	✅		

Table 28: Standard User System Permissions

System Permissions	Enabled
API Enabled	✅
Edit Events	✅
Edit Tasks	✅

Performance Cycle Manager

The Performance Cycle Manager profile is typically used for creating and deploying performance summaries to employees.

Table 29: Performance Cycle Manager Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Calibration (tab)	Default On						
Coaching (object)		✅	✅	✅	✅		
Coaching (tab)	Default On						
Documents		✅	✅	✅			
Endorsements		✅	✅	✅	✅		
Feedback (object)		✅	✅	✅	✅	✅	✅
Feedback Questions		✅	✅	✅	✅	✅	✅
Feedback Question Sets		✅	✅	✅	✅	✅	✅
Feedback Requests (and Feedback tab)	Default On	✅	✅	✅	✅	✅	✅
Goal Links		✅	✅	✅	✅		
Goals (object)		✅	✅	✅	✅		
Goals (Completion Date field)		✅					

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Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Goals (Key Company Goal field)		✅					
Goals (tab)	Default On						
Metric Data Link		✅	✅	✅	✅		
Metrics		✅	✅	✅	✅		
Performance Cycles	Default On	✅	✅	✅	✅	✅	✅
Recognition (tab)	Default On						
Reward Funds	Default On	✅					
Reward Fund Types	Default On	✅					
Rewards		✅					
Skills	Default On	✅	✅				
Skill Users		✅	✅	✅	✅		

Table 30: Performance Cycle Manager System Permissions

System Permissions	Enabled
API Enabled	✅
Edit Events	✅
Edit Tasks	✅
Enable Work.com Calibration	✅
View Setup and Configuration	✅

Work.com Administrator

The Work.com Administrator profile gives a user full administrative access to Work.com objects and features.

Table 31: Work.com Administrator Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Calibration (tab)	Default On						

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Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Coaching (object)		✔	✔	✔	✔	✔	✔
Coaching (tab)	Default On						
Documents		✔	✔	✔	✔	✔	✔
Endorsements		✔	✔	✔	✔	✔	✔
Feedback (object)		✔	✔	✔	✔	✔	✔
Feedback Questions		✔	✔	✔	✔	✔	✔
Feedback Question Sets		✔	✔	✔	✔	✔	✔
Feedback Requests (and Feedback tab)	Default On	✔	✔	✔	✔	✔	✔
Goal Links		✔	✔	✔	✔	✔	✔
Goals (object)		✔	✔	✔	✔	✔	✔
Goals (Completion Date field)		✔					
Goals (Key Company Goal field)		✔		✔			
Goals (tab)	Default On						
Metric Data Link		✔	✔	✔	✔	✔	✔
Metrics		✔	✔	✔	✔	✔	✔
Performance Cycles	Default On	✔	✔	✔	✔	✔	✔
Recognition (tab)	Default On						
Reward Funds	Default On	✔	✔	✔	✔	✔	✔
Reward Fund Types	Default On	✔	✔	✔	✔	✔	✔
Rewards		✔	✔	✔	✔	✔	✔
Skills	Default On	✔	✔	✔	✔	✔	✔
Skill Users		✔	✔	✔	✔	✔	✔

Table 32: Work.com Administrator System Permissions

System Permissions	Enabled
API Enabled	✅
Create custom Badge Definitions	✅
Edit Events	✅
Edit Tasks	✅
Enable Work.com Calibration	✅
Moderate Chatter	✅
View Setup and Configuration	✅

SEE ALSO:

> Work.com Feature Access
>
> Assign Work.com Profiles

Manage Work.com Features

Enable or Disable Work.com Settings

On the Work.com Settings page, you can enable and disable features like Thanks, Rewards, Calibration, and Skills for your organization.

All the settings except for Thanks Settings and Skills Settings require a Work.com license. Work.com is available as an add-on license for **Professional Edition**, **Enterprise Edition**, or **Unlimited Edition** and is included in **Performance Edition**.

1. From Setup, enter "Work.com Settings" in the `Quick Find` box, then select **Work.com Settings**.
2. Select the Work.com feature you want to enable or deselect the feature you want to disable.

Feature	Section	Description
Enable Thanks	**Thanks Settings**	Enable Thanks to allow users to recognize others with thanks badges on the Chatter feed.
		If you disable this setting, users no longer see the Thanks action in the Chatter publisher. However, they can still see previously created Thanks posts.
Restrict Custom Badge Creators	**Thanks Settings**	By default, all users can create custom badges. This setting restricts badge creation to users that

Feature	Section	Description
		have the "Create" permission on the Reward object.
Enable Rewards	**Recognition Settings**	Enable Rewards to tie tangible rewards to badges. Reward creators can upload gift codes to create Reward funds. See the "Reward Funds" topic for more information about creating rewards.
Enable Manager Groups for Coaching	**Coaching Settings**	Enable manager groups to give managers access to the coaching spaces of the users that report to them. To enable this setting, the Manager Groups setting must first be enabled in Setup, under **Sharing Settings**.
Enable Manager Groups for Goals	**Goal Settings**	Enable manager groups to give managers access to the goals of the users that report to them. To enable this setting, the Manager Groups setting must first be enabled in Setup, under **Sharing Settings**.
Enable Calibration	**Perform Settings**	Enable Calibration to see and update performance across teams and individuals.
		Note: For **Performance Edition** organizations, Calibration is not available for the following profiles: Contract Manager, Marketing User, Read Only, and Solution Manager.
Enable Skills	**Skills Settings**	Enable Skills to allow users to add skills to their profiles and endorse the skills of other users. Enabling this setting replaces the Knowledgeable About widget on Chatter profiles.
Restrict Skill and Endorsement Editing to Record Detail Pages	**Skills Settings**	Disables inline editing of skills and endorsements on Chatter profiles, and restricts editing to record detail pages. Recommended if you have customized these objects with custom required fields.
		Note: Don't enable this setting if you want to use skills in Chatter profiles.
Enable Automatic Skill Feed Posts	**Skills Settings**	Enable to automatically create Chatter feed posts when a user adds a new skill.
Enable Suggested Skills	**Skills Settings**	Enable Suggested Skills to have the skills widget suggest skills for users to add based on their Chatter Topics activity.

3. Click **Save**.

SEE ALSO:

Work.com Editions and Permissions

Most Work.com features require the Work.com add-on, but Skills and Thanks functionality (excluding Rewards) are freely available to Sales Cloud users. The permissions and preferences necessary for different tasks are broken up by feature area.

General Work.com Administrator Tasks

This includes tasks for administering and implementing Work.com.

Administrator Task	Preferences and Permissions Required
Enable Work.com features:	"Customize Application"
Assign a Work.com administrator:	"Customize Application"
Assign permission sets:	"Assign Permission Sets"
Assign profiles:	"Manage Users"
Assign user licenses:	"Manage Users"
Assign user feature licenses	"Manage Users"
Set up actions:	"Customize Application"
Customize fields tracked in feeds:	"Customize Application"
Set field-level security:	"Manage Profiles and Permission Sets" "Customize Application"

EDITIONS

Available in: Salesforce Classic

Work.com is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

Thanks and Reward Tasks

This includes tasks for Work.com end users, such as viewing and creating thanks badges and rewards.

End User Task	Preferences and Permissions Required
View the Badges tab:	No additional user permissions needed

End User Task	Preferences and Permissions Required
Build a badge:	"Create" on Documents
	The "Restrict Custom Badge Creator" setting is disabled by default. If the setting is enabled, users need the "Create Custom Badge Definitions" permission.
View Reward Funds:	"Read" on Reward Funds
Create Reward Funds:	"Create" on Rewards
	"Create" on Reward Funds
View Reward Fund Types:	"Read" on Reward Fund Types
Create Reward Fund Types:	"Create" on Reward Fund Types
	"Read" and "Create" on Reward Funds
	"Read" and "Create" on Rewards

Skills Tasks

This includes tasks for Work.com end users using skills.

End User Task	Preferences and Permissions Required
Add skills:	"Create" on Skills and Skill Users
Remove skills:	"Read" on Skills
	"Delete" on Skill Users
Add endorsements to skills:	"Create" on Endorsements
	"Read" on Skills and Skill Users

Goal Tasks

This includes tasks for Work.com end users using goals.

End User Task	Preferences and Permissions Required
View goals:	"Read" on Goals and Goal Links
Create goals:	"Create" on Goals and Goal Links
Edit goals:	"Edit" on Goals and Goal Links
Delete goals:	"Delete" on Goals and Goal Links

Metric Tasks

This includes tasks for Work.com end users using metrics.

End User Task	Preferences and Permissions Required
View metrics:	"Read" on Metrics
Create metrics:	"Create" on Metrics
Link metrics to reports:	"Create" on Metric Data Links

Coaching Tasks

This includes tasks for Work.com end users using coaching spaces.

End User Task	Preferences and Permissions Required
View coaching spaces:	"Read" on Coaching
Create coaching spaces:	"Create" on Coaching
Set coaching to Inactive:	"Edit" on Coaching

Feedback Tasks

This includes tasks for Work.com end users using feedback.

End User Task	Preferences and Permissions Required
View Feedback:	"Read" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles
Create Feedback:	"Create" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles
Edit or submit Feedback:	"Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles
Delete Feedback (only for administrators with MAD/VAD permissions)	"Delete" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles

Performance Summary Tasks

This includes tasks for Work.com end users using performance summaries.

End User Task	Preferences and Permissions Required
View performance summaries:	"Read" on Performance Cycles
Create performance summaries:	"Create" on Performance Cycles
Answer and submit performance summaries:	"Create," "Read," and "Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles
Add peers to performance summaries	"Create," "Read," and "Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles

Performance Summary Cycle Tasks

This includes tasks for Work.com administrators managing performance summary cycles.

Administrator Task	Preferences and Permissions Required
Create a performance summary cycle:	"Create," "Read," "Edit," "Delete," "View All," and "Modify All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles
Add people to a performance summary cycle:	"View Setup and Configuration" "Create," "Read," "Edit," "Delete," "View All," and "Modify All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles
Delete people from a performance summary cycle:	"Create," "Read," "Edit," "Delete," "View All," and "Modify All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles
Edit a performance summary cycle:	"Create," "Read," "Edit," "Delete," "View All," and "Modify All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles
View the Calibration tab:	"Enable Work.com Calibration"
Edit performance ratings:	"Create," "Read," and "Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles "Enable Work.com Calibration"

SEE ALSO:

Enable or Disable Work.com Settings

Work.com Implementation Overview

Create a Support Case

Log a new case with support if you need certain permissions enabled or are experiencing technical difficulties.

1. Log in to Salesforce, then go to the Help and Training page.

2. In the Contact Support section, click **Create a Case**.
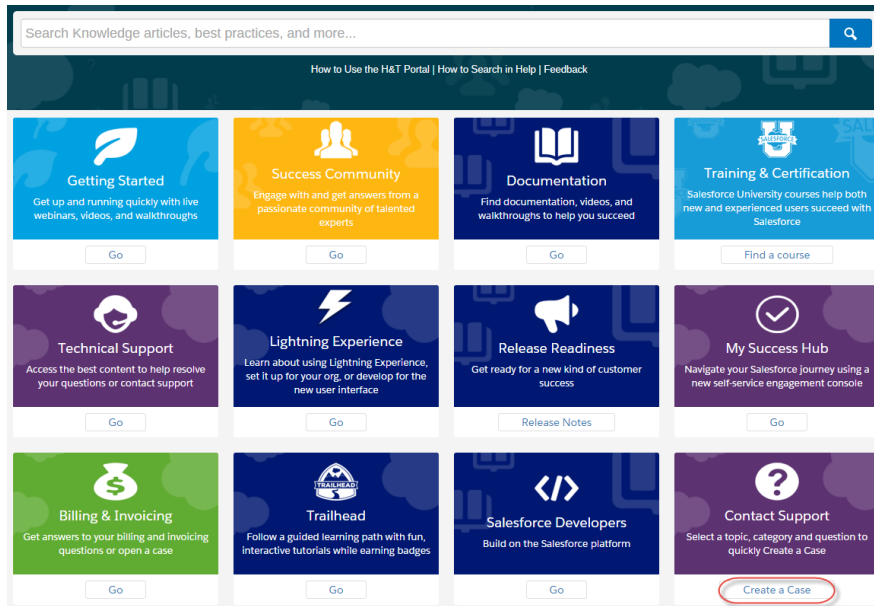
3. Select your support topic and category.

   For example, if your issue is related to Work.com, click **Sales Cloud** > **Work.com**.

4. Select a question that relates to your issue.

5. If you don't find the solution to your problem, click **Log a New Case**.
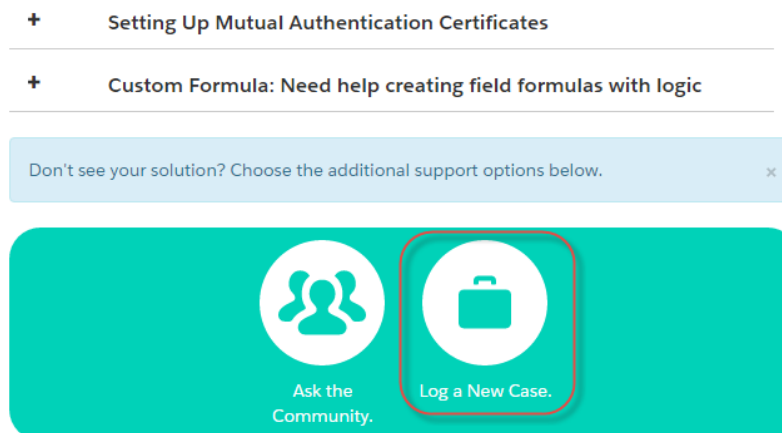
6. Enter case details and click **Submit**.

Note: To attach related files, click **Attach a File** after the case is created.

SEE ALSO:

Enable or Disable Work.com Settings

Performance Summary Cycles Overview
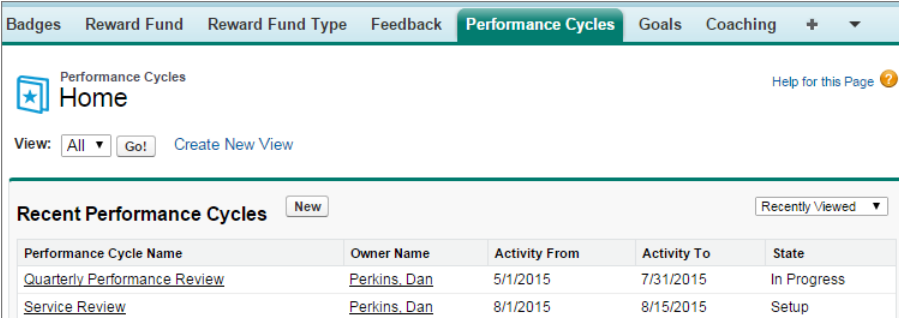
Use Work.com performance summary cycles to create, deploy, and share performance summaries across your company.

In a typical performance summary cycle, you perform the following activities:

1. Plan—Create a performance summary cycle and add the people you want reviewed.

2. Deploy—Make the performance summaries available for users to complete.

3. Evaluate—Write performance summaries and submit them.

4. Calibrate—Optionally compare and update submitted performance summaries with the Calibration feature.

5. Share—Share the submitted performance summaries with summary subjects.

6. Finish—End the performance summary cycle.

Click the Performance Cycles tab to see a list of recently viewed performance cycles.

Note: If the Performance Cycles tab isn't displayed, select Work.com from the Force.com app drop-down menu at the top-right or click ⊞ to the right of your current tabs and select it from the All Tabs page.

Click **New** to create a performance cycle, or click the name of a cycle to see more details.

From this page you can:

- See details about the performance summary cycle.
- Take actions on the cycle. Available actions are determined by your cycle's state and may include **Clone**, **Edit**, **Deploy**, **Delete**, **Share All**, and **Finish**.
- Access the questions related to a performance cycle.
- View a list of performance summary feedback requests. You can also add subjects individually or upload a CSV file to add subjects in bulk.

- View a list of jobs performed by the performance cycle, including cycle deployment and sharing performance summaries.

SEE ALSO:

Create a Performance Summary Cycle

Create a Work.com performance summary cycle from the Performance Cycles page to gather feedback about people in your organization.

1. Click the Performance Cycles tab.

   If the Performance Cycles tab isn't displayed, select Work.com from the Force.com app drop-down menu at the top-right or click ➕ to the right of your current tabs and select it from the All Tabs page.

2. Click **New**.

   > 📝 Note: You can also create performance cycles by clicking **Clone** on another performance cycle's detail page, but cloning a cycle copies only the cycle name, activity start date, and activity end date. Question sets, due dates, and other details are not copied.

3. Enter a cycle name, an activity start date, and an activity end date.

4. Click **Save**.

5. Click **New Feedback Question Set**.

6. Enter a question set name, feedback type, and due date.

   Question sets group questions according to their intended audience. For example, a performance summary about Bill Jones could have up to four different audiences:

   - Manager Summary—Questions for Bill's manager. By default, every cycle must include a manager summary.

   - Self Summary—Questions for Bill.

   - Peer Summary—Questions for Bill's peers.

   - Skip Level Summary—Questions for Bill's direct reports.

7. Click **Save**.

8. Click **New Feedback Question**.

9. Enter question details.

   You can specify rules for each question:

   - Optional—The person writing the summary isn't required to answer this question.

   - Confidential—The subject of the summary won't see the submitted answer. This rule isn't available for self summaries.

   You can also add instructions at the beginning of each question.

EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view performance summaries:
- "Read" on Performance Cycles

To create a Performance Summary Cycle:
- "Create," "Read," "Edit," "Delete," "Modify All," and "View All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles

10. Click **Save**.

11. Add additional question sets and questions, as needed.

Once you're done adding questions, add people to the performance summary cycle.

SEE ALSO:

Performance Summary Cycles Overview

Add People to a Performance Summary Cycle

Deploy a Performance Summary Cycle

Add People to a Performance Summary Cycle

Add people to a performance summary cycle manually or through a CSV file.

You can only add people to summary cycles with a state of Setup or In Progress.

1. Click the Performance Cycles tab.

   If the Performance Cycles tab isn't displayed, select Work.com from the Force.com app drop-down menu at the top-right or click ➕ to the right of your current tabs and select it from the All Tabs page.

2. Click a performance summary cycle.

3. In the Feedback Requests section, add users to the performance cycle.

   - To manually enter subjects, click **Add Subject**. Enter the user's name and click **Save**.

   - To upload subjects through a CSV file, click **Upload Subject CSV**, then select **Choose File**. Select a CSV file, click **Upload**, and save your changes.

     The CSV file should contain a list of either user IDs (example: 005R0000000DjZW) or usernames (example: john@acme.com) in the first column. The data should begin on the second row, because the first row is seen as the header row and is not uploaded.

     💡 **Tip:** Many organizations have specific requirements about participation in a performance summary cycle. Use the Users report to narrow down the list of users you want to add to performance summaries and obtain the usernames there.

The Job Tracker displays the status of the CSV upload. Additionally, you can confirm the users included in a performance summary cycle in the Feedback Requests section.

SEE ALSO:

Performance Summary Cycles Overview

Deploy a Performance Summary Cycle

Delete People from a Performance Summary Cycle

EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view performance summaries:
- "Read" on Performance Cycle

To add people to a Performance Summary Cycle:
- "View Setup and Configuration"

  AND

  "Create," "Read," "Edit," "Delete," "Modify All," and "View All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles

Delete People from a Performance Summary Cycle

If you added someone you don't need to evaluate, delete them from the performance summary cycle.

You can only delete people from summary cycles with a state value of Setup.

1. Click the Performance Cycles tab.

   If the Performance Cycles tab isn't displayed, select Work.com from the Force.com app drop-down menu at the top-right or click ➕ to the right of your current tabs and select it from the All Tabs page.

2. Click a performance summary cycle.

3. In the Feedback Requests section, click **Del** in the Action column of the subject you want to delete.

SEE ALSO:

[Performance Summary Cycles Overview](#)

[Deploy a Performance Summary Cycle](#)

[Add People to a Performance Summary Cycle](#)

Deploy a Performance Summary Cycle

Deploy a performance summary cycle to make the summaries available for people to complete.

> **Note:** You can't edit questions or cycle details after a performance summary cycle is deployed, but you can add more people.

1. Click the Performance Cycles tab.

   If the Performance Cycles tab isn't displayed, select Work.com from the Force.com app drop-down menu at the top-right or click ⊞ to the right of your current tabs and select it from the All Tabs page.

2. Click a performance summary cycle.

3. Click **Deploy**.

   Any inactive users are automatically removed prior to cycle deployment. When deployment is complete, you'll receive a detailed email that describes the cycle deployment and any users that were removed. You can add them back again later, if necessary.

Once deployed, a manager summary is assigned to the manager of each person added to the cycle. If the cycle contains self summaries, the self summary is assigned to the associated person. Each person assigned a summary receives an email notification and can start working on their summaries.

SEE ALSO:

Performance Summary Cycles Overview

Create a Performance Summary Cycle

Performance Summary Cycle Actions

Different actions are available on a performance cycle's detail page depending on the cycle's state.

Action	Available In	Description
Edit	Setup	Allows user to edit a performance cycle's name, activity start date, and activity end date.
Deploy	Setup	Deploys the summary cycle and associated summaries. Changes the summary cycle status to In Progress.
Delete	Setup	Deletes a summary cycle and the associated summaries.
Finish	In Progress	Completes a performance summary cycle and changes the summary cycle status to Finished. This also removes declined summaries and summaries that were not submitted.
Clone	Setup, In Progress, Finished	Clones a summary cycle. This copies the cycle name, activity start date, and activity end date. However, question sets, due dates, people, and other details are not copied.
Share All	In Progress	Shares the submitted performance summaries with the summary subjects. This doesn't include questions marked Confidential.

SEE ALSO:

Performance Summary Cycles Overview

Create a Performance Summary Cycle

Deploy a Performance Summary Cycle

Calibration Overview

Use Work.com calibration reports to visualize, compare, and update performance ratings across your entire company.

> ⬛ Note: For **Performance Edition** organizations, Calibration is not available for the following profiles: Contract Manager, Marketing User, Read Only, and Solution Manager.

Calibration reports are populated with data from performance summary cycles. They are designed for managers and executives to review overall performance of their teams or organizations. You can quickly identify high and low performers, and depending on user permissions, make changes to a person's individual performance ratings directly in the calibration report.

Create your own calibration report or download the calibration reports package from the Package Installation page.

- Production Calibration Report Package
- Sandbox Calibration Report Package

Access calibration reports from the Calibration tab. Note that you can only view the results for a single performance summary cycle at a time.

The Distribution Graph shows the distribution of ratings for each multiple choice question. Select different questions in the drop-down list to view the associated rating distribution.

The Employees in Graph section shows the performance summary details for users included in the performance review. You can filter and sort each column. Filtering the columns also updates the distribution graph. You can also add custom columns to filter performance summary details by location, department, or other measures. View individual performance summaries by clicking on the View column.

SEE ALSO:

    Enable or Disable Work.com Settings

    Create a Calibration Report

    Customize a Calibration Report

    Update Performance Summary Details

    Export Calibration Report Details

    Performance Summary Cycles Overview

Create a Calibration Report

Create a calibration report by copying an existing report or creating a new report that meets the proper criteria.

Alternatively, you can download the calibration report package from the Package Installation page.

- Production Calibration Report Package
- Sandbox Calibration Report Package

1. On the Calibration tab, select a calibration report from the drop-down list.
2. Click **View/Edit Report**.
3. Click **Save As**.
4. Type a name, an optional description, unique name, and specify the report folder.

    If the report is saved to a public folder, anyone with permission to view the folder sees this report, but each user will only see performance summaries they have access to. If the report is saved to "My Personal Custom Reports," only you will see the Calibration report.

5. Click **Save & Return to Report**.

    💡 **Tip:** You can also create a new report. Once a report meets specific criteria, it automatically appears in the Calibration drop down.

    - The report must be a **Work.com Calibration** report type.
    - The report must be in a **Summary Format**, grouped by Feedback Question Name and then by Feedback.
    - These columns should be listed in the report:
        - Performance Cycle ID
        - Feedback Request ID
        - Feedback ID
        - Subject: User ID
        - Subject: Full Name (or Subject: First Name and Subject: Last Name)
    - The report must be filtered to only view one performance summary cycle.

SEE ALSO:

Calibration Overview

Customize a Calibration Report

Customize a Calibration Report

Enhance your calibration report with additional columns and filters.

Calibration reports use Salesforce reporting. You can filter and specify additional custom columns for your calibration report. The columns display in the order you specify. However, the sort order in reports doesn't apply in calibration reports.

1. On the Calibration tab, select a calibration report from the drop-down list.
2. Click **View/Edit Report**.
3. Click **Customize**.
4. Add filters and columns to your report, as necessary.
   - The following columns are required and can't be removed from calibration reports:
     - Performance Cycle ID
     - Feedback Request ID
     - Feedback ID
     - Subject: User ID
     - Subject: Full Name (or Subject: First Name and Subject: Last Name)
5. Click **Save**.

👁 Example: Some common uses include:
   - Filter by Performance Summary Cycle for the required performance summary cycle
   - Filter by Department to create a report for the department
   - Filter by Location to create a report for that location

SEE ALSO:

Calibration Overview

Create a Calibration Report

Update Performance Summary Details

Easily update performance summary details directly in the calibration report.

You can only update performance summaries you have access to. If you have "Modify All Data" or "View All Data" permissions for performance summaries, then you can see the ratings of performance summaries before they are submitted. The only editable fields are the multiple choice questions answered by a user's manager, and do not include peer, self, or skip level summaries. Once the performance summary is finalized and shared with the user, answers can't be edited.

1. On the Calibration tab, select a calibration report from the drop-down list.

2. On the Employees in Graph section, double-click the rating to you want to change.

   You can only change ratings on a submitted performance summary.

3. Select the new value.

4. Click **Save**.

SEE ALSO:

  Calibration Overview

  Create a Calibration Report

Export Calibration Report Details

Performance summary data can be exported with the underlying calibration report.

1. On the Calibration tab, select a calibration report.

2. Click **View/Edit Report**.

3. Click **Export Details**.

4. Select the file encoding and file format.

5. Click **Export**.

SEE ALSO:

    Calibration Overview

    Create a Calibration Report

Skills Customization

You can change object permissions for the skill and endorsement objects to suit the needs of your organization.

Customize the skill and endorsement objects in the same way you edit other objects. This includes adding custom fields, modifying page layouts, and adding triggers, workflow, and validation rules. You can also customize the hovers that appear on skills, so that you expose specific standard and custom fields.

Administrators can change object permissions for the skill and endorsement objects to suit the needs of their organization. For example, you can configure object settings so users can't create skills, and only skills created by an administrator can be assigned to others. By default, supported user profiles have the ability to see, create, edit, and remove skills, and administrators have "Modify All Data" and "View All Data" permissions.

Additionally, administrators can change some skills settings on the Work.com Settings page. From Setup, enter `Work.com Settings` in the `Quick Find` box, then select **Work.com Settings**.

Edit Skills and Endorsements via record detail pages

Disables inline editing of skills and endorsements on Chatter profiles. Recommended if you have customized these objects with custom required fields.

> 📝 Note: Don't enable this setting if you want to use skills in Chatter profiles.

Generate feed posts when users add a new skill

Automatically creates a Chatter feed post when a user adds a new skill to a profile.

Enable Suggested Skills

Automatically suggests skills based on users' Chatter topics.

You can also install a package with additional reports and dashboards for thanks and skills features:

- Thanks and Skills Reports and Dashboards (Production Package)
- Thanks and Skills Reports and Dashboards (Sandbox Package)

SEE ALSO:

Skills Limitations

Enable or Disable Work.com Settings

Work.com Report and Dashboard Overview

Skills Limitations

Skills and endorsements have special behaviors and limitations.

Note the following restrictions:

- The Skills feature is not supported in Communities.
- All skill records are visible to users with the "Read" permission on Skills.
- Skill User and Endorsement records can only be deleted by the owner and users with the "Modify All Data" permission.
- To restore the users and endorsements associated with a deleted skill, retrieve the skill from the recycle bin. Creating a skill with the same name will not restore the prior associations.
- Users can only endorse others, not themselves. Users can't be endorsed more than once by the same person on the same skill.

  Administrators can endorse users on behalf of other users through the API.

- Users can't see the skills widget on a Chatter profile page unless Chatter is enabled and users have the "Read" permission on Skills and Skill Users.

SEE ALSO:

Skills Customization

Enable or Disable Work.com Settings

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