GETTING STARTED WITH DIVISIONS

Summary

Divisions let you segment your organization's data into logical sections, making searches, list views, and reports more meaningful to users.

Best Practices

Your organization may benefit from divisions if:

- The data can be divided into three or more logical sections that do not share data.
- Most divisions will be roughly equal in size, and no single division will be dramatically larger than the others.

Caution

Enabling divisions is irreversible. After implementing divisions, you cannot revert back to a state that does not have division fields.

Best Practices

Inform users about cosmetic changes after divisions are enabled, such as division fields.

Benefits

Divisions can improve user experience in the following ways:

- Division-specific searches allow users to see what is most relevant to them. This includes sidebar searches, advanced searches, and lookup dialog searches.
- Division-specific list views allow users to see what is most relevant to them.
- In the following cases, division-specific reports are faster than if divisions were not enabled:
  - The report does not have selective filters that include fields such as `Name`, `Created Date`, `Last Modified Date`, or `Record Type`.
  - The division is no larger than one third of the organization's data.
- The "Affected by Divisions" user permission lets you decide which users will see these changes. Users without this permission cannot limit searches, list views, or reports by division.

Considerations

If you are considering divisions, be aware of the following:

- Divisions are not recommended if data is shared across divisions. Shared accounts and shared opportunities cannot belong to more than one division.
- Each user can have only one default division, which applies to the new accounts, leads, and custom objects they create. Therefore, divisions are not recommended if you have numerous users that would own data in several divisions.
- However, note that users can always view records in all divisions. Divisions do not provide any type of security for your records. Users can also create records in other divisions if the `Division` field is added to their page layouts.
- Records without a parent record (for example, a contact not associated with an account) are automatically routed to your organization's "global" division.
- If unparented records are created via the Force.com API, those records are given the default division of the API user who created them.

Preparation

If you decide to implement divisions, use the following tips to prepare:

- Contact Salesforce to guide you through the implementation process.
- Carefully plan the queries that you will use to section your data.
- Read the online help for divisions. Topics on divisions are in the online help index.

Implementation Process

1. Allot sufficient time for the implementation; you may want to wait until the start of a weekend or the end of a business day.

2. Have Salesforce enable divisions for your organization. This automatically creates the standard "global" division.

3. From Setup, enter `Manage Divisions` in the `Quick Find` box, then select **Manage Divisions** to create divisions.

4. For custom objects, select `Enable Divisions` on the custom object edit page.

5. From Setup, enter `Mass Division Transfer` in the `Quick Find` box, then select **Mass Division Transfer** to transfer leads, accounts, and custom objects into their relevant divisions. The records associated with a record, inherit the division of that record.

6. Add division fields to page layouts, as appropriate.

7. Add divisions to field-level security, as appropriate.

8. Set users' default division and enable the "Affected by Divisions" permission.