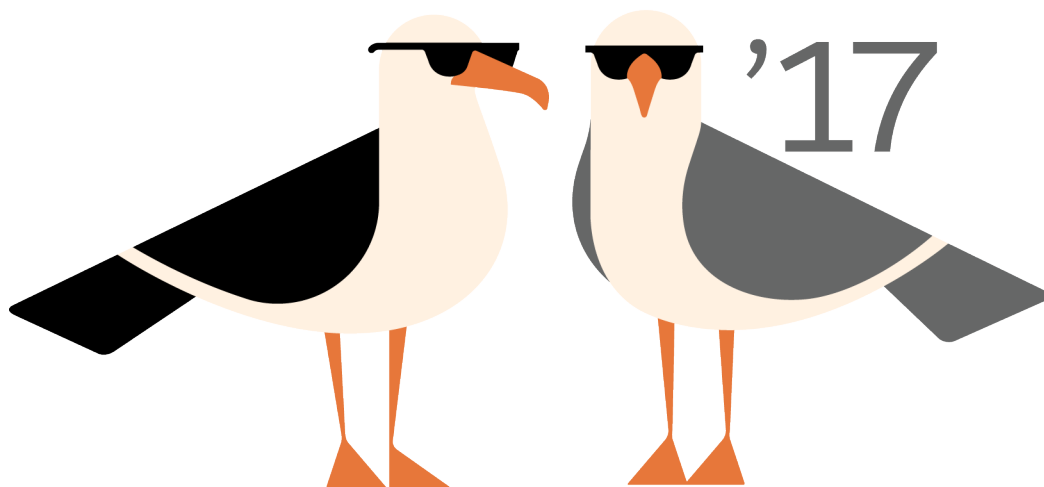




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# Sell to Your Customers

Salesforce, Summer '17





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# INCREASE YOUR SALES SUCCESS WITH SALESFORCE

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

## Core Sales Features

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

- [Accounts](#)
- [Contacts](#)
- [Leads](#)
- [Campaigns](#)
- [Opportunities](#)
- [Products and Price Books](#)
- [Contracts](#)
- [Social Network Integration](#)
- [Enterprise Territory Management](#)
- [Collaborative Forecasts](#)
- [Data.com](#)

## Sales Productivity Features

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

Learn more about features for [Sales Productivity](#).

## Sales Cloud Einstein

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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.

Learn more about features for Sales Cloud Einstein.

# SELL TO YOUR CUSTOMERS

## Managing the People and Organizations You Sell To

### Establishing Your Customers, Competitors, and Partners

#### Accounts

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

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

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

There are a few things to know about accounts.

#### Salesforce Offers Two Types of Accounts

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



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

#### The Accounts Feature Can Be Renamed

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

#### Users Can Access Accounts on Mobile Devices

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

#### EDITIONS

Business accounts available in: Both Salesforce Classic and Lightning Experience

Business accounts available in: **All Editions**

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

### Accounts Can Be Linked to Social Networks and News

Additional information and updates about your accounts are available if your company uses the Social Accounts, Contacts, and Leads; the News component (Lightning Experience only); or Data.com Clean features.

SEE ALSO:

[Account Teams](#)

## What Is a Person Account?

Person accounts store information about individual consumers.

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

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



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


SEE ALSO:

[Person Account Behaviors](#)

[Accounts](#)

## Considerations for Using Merge Fields for Person Accounts

A merge field is a field you can put in an email, an email template, a mail merge template, a custom link, or a formula to incorporate values from a record. You can use merge fields in the subject and body of custom HTML templates. When using merge fields, it's a good idea to understand how they work and what to expect in your merged documents and emails.

- If your organization uses person accounts, business account and person account fields are available as account merge fields. Account fields exclusive to person accounts, such as `Birthdate`, `Email`, and `Title` have "Account.Person" in their merge field names. For example, `{!Account.PersonBirthdate}`.
- You can use the merge field `{!Account.IsPersonAccount}` to determine whether you are working with a person account or a business account.
- Account fields that previously had unique names and labels are no longer unique because some contact fields are displayed as part of the account object. Look for the person account icon (  ) to identify these fields. Ensure that all custom account fields have field names and

### EDITIONS

Business accounts available in: Both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

### EDITIONS

Business accounts available in: Both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

labels unique to your organization so that the merge field references the correct field. For more information, see [What Is a Person Account?](#) on page 3.

### **Important:**


- If two or more custom objects have matching names or labels, only one of the objects appears when you select from available merge fields. Make sure that all custom objects have unique names and labels so that you can select merge fields from any of the objects.

SEE ALSO:

[Accounts](#)

[Validation Rules for Person Accounts](#)

## Validation Rules for Person Accounts

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

A merge field incorporates values from a record. You can add merge fields to an email template, mail merge template, custom link, or formula. The list of available merge fields depends on the type of data that you're working with. This topic lists considerations for working with merge fields in validation rules with person accounts.

### Tips

- To define a validation rule that applies only to person accounts, use the `IsPersonAccount` merge field. For example, `Account.City = "San Francisco"` verifies that a business or person account's city is San Francisco, while `IsPersonAccount ( Account.City = "San Francisco")` verifies that a person account's city is San Francisco.
- Handle person account and business account names separately in account validation rules.
  - For business accounts, use the `Name` merge field.
  - For person accounts, use the `FirstName` and `LastName` merge fields.
- `Birthdate`, `Email`, and other fields that are only supported for person accounts are available as merge fields in account validation rules. When you use one of those merge fields, business account records are processed as if those fields have blank values. For business account and person account fields, see [Account Fields](#) on page 14.

SEE ALSO:

[Accounts](#)

[Considerations for Using Merge Fields for Person Accounts](#)

### EDITIONS


Business accounts available in: Both Salesforce Classic and Lightning Experience

Business accounts available in: **All Editions**


Person accounts available in: Both Salesforce Classic and Lightning Experience

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

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

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



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

SEE ALSO:  
[Accounts](#)

Person Account Behaviors

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

Salesforce Functionality	Person accounts Behavior
Account Merge	Person accounts can be merged only with other person accounts, and only using Salesforce Classic. You can't merge person accounts that are enabled to use portal or community users. See <a href="#">Merge Duplicate Accounts</a> on page 28.
Account Quick Create	On the accounts home page in Salesforce Classic, the fields in the Quick Create area are based on whether the default account record type set on your profile is a person account record type or a business account record type.
Accounts	<p>Person accounts can't be included in account hierarchies.</p> <p>Person accounts can't have direct relationships with other accounts or contacts. You can, however, use Contacts to Multiple Accounts to create indirect relationships between a person account and another person account, business account, or contact.</p>
Activities	<p>Person accounts can be associated with events or tasks using either the <code>Name</code> or <code>Related To</code> fields.</p> <p>As with contacts, person accounts can be invited to events.</p> <p>For users to request a meeting with a person account, the <code>Email</code> field must be added to the Person accounts page layout.</p>
Campaigns	<p>As with contacts, person accounts can be added to campaigns and have a Campaign History related list.</p> <p>If you create a Contact related list based on a custom lookup relationship, the <b>Add to Campaign</b> row-level action doesn't show up for person accounts. Click <b>View</b></p>

EDITIONS





Business accounts available in: Both Salesforce Classic and Lightning Experience


Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

Salesforce Functionality	Person accounts Behavior
	<b>All</b> to see the full related list and access the Add to Campaign mass action. This applies to Lightning Experience and Salesforce1. (The Add to Campaign action isn't available in Salesforce Classic.)
Cases	On cases, person accounts can be entered in the <code>Account Name</code> field, the <code>Contact Name</code> field, or both.
Chatter Feed Tracking	When you follow person accounts, you follow the account fields, but not the contact fields.
Communities and Portals	As with contacts, person accounts can be enabled as users for customer communities and portals.  Person accounts can't be enabled as users for partner communities and portals because partners represent companies, not individuals.
Contacts	Unlike business accounts, person accounts can't have direct relationships with contacts. You can, however, use Contacts to Multiple Accounts to create indirect relationships between a person account and a contact.
Contacts to Multiple Accounts	<a href="#">Contacts to Multiple Accounts</a> works with person accounts. That means a person account can be either a related contact on a business account or a related account on a contact. A person account can also be related to another person account as either a related contact or related account. Person accounts are always indirectly related to other accounts or contacts.
Custom Objects	Custom objects with relationships to either accounts or contacts can be added as related lists on person accounts.
Data.com	Person accounts aren't supported in Data.com products and features, including Prospector, Clean, and Data Integration.
Desktop Integration	Person accounts are supported in the following Salesforce integration features. <ul style="list-style-type: none"> <li>• Lightning for Outlook</li> <li>• Salesforce for Outlook</li> <li>• Connect Offline</li> </ul> Person accounts aren't supported in Lightning Sync.
Duplicate Management	Duplicate rules support person accounts. Merging duplicate person accounts is supported in Salesforce Classic only.
Email	As with contacts, you can send individual emails and mass emails to person accounts.
ExactTarget	Person accounts are supported, but more configuration is required.
Field History	Account and contact fields that appear on person account records can be tracked using the account field history settings. Person account field history is then captured in the Account History related list, the Account History report, and field audit trails.

Salesforce Functionality	Person accounts Behavior
Fields	<p>Most standard account and contact fields and all custom account and contact fields are available for person account page layouts.</p> <p>Some business account fields (such as <code>Parent Account</code>) and some contact fields (such as <code>Reports To</code>) are not supported for person accounts. See <a href="#">Account Fields</a>.</p>
Geocodes	Geocodes for addresses can't be added to person accounts using Data.com integration rules.
Icons	<p>In Salesforce Classic, person accounts have a person icon (  ), while business accounts have a folder icon (  ).</p> <p>In Lightning Experience, person accounts have a person with building icon (  ), while business accounts have building icon (  ).</p> <p>Person accounts can be denoted in search results, list views, and lookup dialogs by adding the <code>Is Person Account</code> field to the appropriate search layout or list view.</p>
Lead Conversion	Leads that don't have a value in the <code>Company</code> field are converted to person accounts. Leads that do have a value in the <code>Company</code> field are converted to business account.
Lightning Pages	See Page Layouts
List Views	<p>Person accounts appear in all account and contact list views, except the Recent Contacts list on the Contacts home page.</p> <p>Quickly see which records are person accounts by adding the <code>Is Person Account</code> field to the list of fields to display. To include or exclude person accounts from a list view, add the <code>Is Person Account</code> field to the filter criteria.</p>
Opportunity Contact Roles	As with contacts, you can associate person accounts to opportunities using the Contact Roles related list.
Packaging	Person accounts components and attributes can be included in managed and unmanaged packages.
Page Layouts	<p>Person accounts have their own page layouts that can include account and contact fields, account custom links, and account and contact related lists.</p> <p>Person accounts page layouts do not support the <code>Reports To</code> and <code>Parent Account</code> fields. See <a href="#">Person Account Fields</a>.</p> <p>When you create a Lightning page for accounts and assign it as the default for either an org or an app, that page becomes the org or app default for both business accounts and person accounts. To display a custom record page for person accounts, create a custom account record page, then assign it to the person account record type.</p>

Salesforce Functionality	Person accounts Behavior
Pardot	Person accounts are supported, but more configuration is required.
Partners	In Salesforce Classic, you can use the Partners related list to relate person accounts to each other. We recommend that you rename the Partners related list to reflect how your person accounts are connected.
Process Builder	Creating or editing a person account triggers processes created with the Process Builder.
Record Types	Administrators can configure multiple record types for person accounts. In the user interface, a person account can only be changed to another person account record type. For more information, see <a href="#">Guidelines for Changing an Account's Record Type</a>
Renamed Tabs and Standard Fields	To customize the names of tabs and fields displayed on person account records, administrators must customize the account and contact tabs and fields.
Search	<p>In Lightning Experience and Salesforce1, person accounts appear in both account and contact search results. In Salesforce Classic, person accounts appear only in account search results.</p> <p>To help users differentiate person accounts from business accounts in search results, administrators can add the <code>Is Person Account</code> field to the appropriate search layout.</p>
Self-Service Portal	<p>As with contacts, person accounts can be enabled as users for your Self-Service portal.</p> <p> <b>Note:</b> 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.</p>
Sharing Settings	<p>If you have enabled person accounts, the organization-wide default sharing for contacts is set to Controlled by Parent and is not editable.</p> <p>If you've customized your contact sharing settings and you want to enable person accounts, change your organization-wide default for contacts to Controlled by Parent. This setting removes all your contact sharing rules and manually shared contacts.</p>
Social Accounts, Contacts, and Leads	As with contacts, you can link person accounts to social network profiles
Storage	Person accounts count against both account and contact storage because each person account consists of one account as well as one contact.
Visual Workflow	Creating or editing a person account triggers flows created with Visual Workflow.

**Salesforce  
Functionality****Person accounts Behavior**

Workflow Rules

Creating or editing a person account triggers account workflow rules.

## SEE ALSO:

[What Is a Person Account?](#)[Person Accounts Implementation Guide](#)

## Guidelines for Changing an Account's Record Type

Record types determine the business processes, picklist values, and page layouts that are available to you when creating records. Before you change an account's record type, be aware of these important details.

If your organization uses person accounts, your administrator has configured two record types for accounts—one for business accounts, and another for person accounts. From the UI, you can change an account's record type from a business account to a business account or from a person account to a person account. However, to change an account's record type from a business account to a person account, or vice versa, you must use the API.

## SEE ALSO:

[Implementation Guide: Implementing Person Accounts](#)[SOAP API Developer Guide: Person Account Record Types](#)**EDITIONS**

Available in: Both Salesforce Classic and Lightning Experience

Record types available in:  
**Professional, Enterprise, Performance, Unlimited,**  
and **Developer** Editions

## Viewing Account Lists

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

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

 **Note:** If your organization has [Salesforce for Wealth Management Overview](#), accounts are called [clients](#).

SEE ALSO:  
[Accounts](#)

### EDITIONS

Business accounts available in: Both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

- To view account lists:
- Read on accounts
- To create business accounts:
- Create on accounts
- To create person accounts:
- Create on accounts and contacts

## Using Accounts

### USER PERMISSIONS

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

### EDITIONS

Business accounts available in: Both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

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

- [View and edit accounts](#).
- Use Social Accounts, Contacts, and Leads to view your accounts’ social network profiles, see their level of influence in social media, and watch related YouTube videos.
- [Find account-related information \(such as contacts\)](#).
- Get Data.com contacts for an account.
- Clean account records with Data.com Clean.
- View account updates and comments using Chatter.
- Add operating hours and service resource preferences to accounts to reflect their field service preferences

SEE ALSO:


[Accounts](#)

Displaying and Editing Account Details

USER PERMISSIONS		EDITIONS
To view accounts:	Read on accounts	Business accounts available in: Both Salesforce Classic and Lightning Experience
To edit business accounts:	Edit on accounts	
To edit person accounts:	Edit on accounts and contacts	Business accounts available in: <b>All</b> Editions
To enable partner accounts:	Manage External Users	
To disable partner accounts:	Edit on accounts	Person accounts available in: Both Salesforce Classic and Lightning Experience
	AND	
	Manage External Users	Person accounts available in <b>Professional, Enterprise, Performance, Unlimited,</b> and <b>Developer</b> Editions
To disable Customer Portal accounts:	Edit on accounts	
	AND	
	Edit Self-Service Users	

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

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

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

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

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

#### SEE ALSO:

[Account Fields](#)

[Accounts](#)

## Guidelines for Creating Accounts

Keep these guidelines in mind when you create accounts.

- To create business accounts, you need “Create” permission on accounts. To create person accounts, you need “Create” permission on both accounts and contacts.
- If your Salesforce admin has set up record types, you can be prompted to choose a **Record Type** when creating an account. Different record types can have different fields and different picklist values.
- To specify that a business account is a subsidiary of another business account, fill in the **Parent Account** field. You can then view an account hierarchy from the account detail page. In Lightning Experience, click **View Account Hierarchy**. In Salesforce Classic, click the **View Hierarchy** link. The **Parent Account** field isn't available for person accounts.
- Use the **Account Site** field to designate different locations of the same company. For example, suppose that Acme.com has offices in Paris and London. Create two accounts, both called Acme.com, but with **Account Site** values of Paris and London, respectively.
- If your Salesforce admin has set up divisions, the division of a new account is automatically set to your default division, unless you manually select a different one.
- If your Salesforce admin has set up territory management, account assignment rules can automatically assign newly created accounts to territories. See [Territory Management](#) on page 194.

#### EDITIONS

Business accounts available in: Both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

#### SEE ALSO:

[Account Fields](#)

[Considerations for Using Account Hierarchy](#)



## Understanding What Happens When You Delete Accounts

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



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

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



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

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

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

- Relationship group members in certain cases. See [Removing Members from Relationship Group Members](#) on page 147.
- Portal roles and groups. See [Using Accounts](#) on page 10.

You can't delete an account if:

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

If you want to delete an account that has closed/won opportunities you own, you have to delete the closed/won opportunities along with the account or keep the account.



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

SEE ALSO:

[Merge Duplicate Accounts](#)  
[Accounts](#)

### EDITIONS

Business accounts available in: Both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view accounts:

- Read on accounts

To delete accounts:

- Delete on accounts

## Account Fields

Accounts have business account fields and person account fields.

### Business Account Fields

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

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

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


#### EDITIONS


Available in: Salesforce Classic and Lightning Experience


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

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

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

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

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

Field	Description	Allows Value from Data.com or D&B
D-U-N-S Number	<p>The Data Universal Numbering System (D-U-N-S) number is a unique, nine-digit number assigned to every business location in the D&amp;B database that has a unique, separate, and distinct operation. D-U-N-S numbers are used by industries and organizations around the world as a global standard for business identification and tracking. This field is available if you use Data.com Prospector or Data.com Clean.</p> <p> <b>Note:</b> To see the entire D-U-N-S number, either</p> <ul style="list-style-type: none"> <li>• Add the account to Salesforce if you haven't yet, or</li> <li>• Clean the account with Data.com if it already exists in Salesforce</li> </ul> <p>Until you add or clean the record, its first five digits will be masked with asterisks (*).</p>	✔ (D&B)
Employees	Number of people employed by the account.	✔ (D&B)
Evaluate this account against territory rules on save	When checked, causes account assignment rules to run when the account is edited and saved. When customizing the page layout for accounts, an administrator can control whether this checkbox displays and whether it is checked by default. See <a href="#">Territory Management</a> on page 194.	
Exclude from territory assignment rules	When checked, shields the account from being evaluated when account assignment rules are run, preventing it from being automatically assigned to territories. Also, if the account is already assigned to territories as a result of assignment rules, checking this box removes the account from those territories. This checkbox only affects rule-based account assignments and has no effect on manual account assignments. See <a href="#">Territory Management</a> on page 194.	
Fax	Fax number. Up to 40 characters are allowed in this field.	✔ (D&B)

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

Field	Description	Allows Value from Data.com or D&B
	which are set by an administrator. Each picklist value can have up to 40 characters.	
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed.	✓ (D&B)
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.	✓ (D&B)
Shipping State/Province	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.	✓ (D&B)
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed.	✓ (D&B)
Shipping Zip/Postal Code	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed.	✓ (D&B)
SIC Code	Standard Industrial Classification code of the account's main business categorization. Up to 10 characters are allowed in this field.	✓ (D&B)
SIC Description	A brief description of an organization's line of business, based on its SIC code.	✓ (D&B)
Territories	<p>The territories to which the account has been assigned. See <a href="#">Territory Management</a> on page 194.</p> <p>For organizations that use Enterprise Territory Management, this field is not available. Enterprise Territory Management offers a related list called Assigned Territories that you can add to account page layouts.</p>	
Ticker Symbol	The abbreviation used to identify publicly traded shares of a particular stock. Also known as the stock symbol. Up to 20 characters are allowed in this field.	✓ (D&B)
Tradestyle	A name, different from its legal name, that an organization may use for conducting business. Similar to "Doing business as" or	✓ (D&B)

Field	Description	Allows Value from Data.com or D&B
	"DBA". This field is available if you use Data.com Prospector or Data.com Clean.	
Type	Type of account, for example, Customer, Competitor, or Partner. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Custom Links	Listing of custom links for accounts as set up by your administrator.	
Website	URL of account's website, for example, www.acme.com. Up to 255 characters are allowed in this field; only the first 50 are displayed.	✓ (Data.com)
Year Started	The year the company was established or the year when current ownership or management assumed control of the company. If the company establishment or ownership year is unavailable, then the year the Dun & Bradstreet record was created will be used. Dun & Bradstreet does not supply this data for branch locations. This field is available if you use Data.com Prospector or Data.com Clean.	✓ (D&B)

## Person Account Fields

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

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


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




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

Field	Description	Is Contact Field
	values or entered as text. If the field is a text field, up to 80 characters are allowed.	
Billing Street	Street address used for billing. Up to 255 characters are allowed in this field.	
Billing Zip/Postal Code	Zip or postal code portion of billing address. Up to 20 characters are allowed.	
Birthdate	The contact's birthday. Click the field, and then choose a date from the calendar.	✓
Created By	User who created the account, including creation date and time. (Read only)	
Custom Links	Listing of custom links for accounts as set up by your administrator.	
Department	The associated business or organizational unit. Maximum 80 characters.	✓
Description	Description of account. Up to 32 KB of data are allowed in this field. Only the first 255 characters display in reports.	
Do Not Call	Whether the contact wants to be contacted by phone. If you use Data.com, the <code>Phone</code> field value is hidden from search results and on the Contact Card, and it's blank in <code>.csv</code> files that are created when you export records.	✓
Email	The contact's email address. A valid email address is required. Maximum 80 characters.	✓
Email Opt Out	Whether the contact wants to receive email. If you use Data.com, the <code>Email</code> field value is hidden from search results and on the Contact Card, and it's blank in <code>.csv</code> files that are created when you export records.	✓
Employees	Number of people employed by the account.	
Evaluate this account against territory rules on save	When checked, causes account assignment rules to run when the account is edited and saved. When customizing the page layout for accounts, an administrator can control whether this checkbox displays and whether it is checked by default. See <a href="#">Territory Management</a> on page 194.	
Exclude from territory assignment rules	When checked, shields the account from being evaluated when account assignment	

Field	Description	Is Contact Field
	rules are run, preventing it from being automatically assigned to territories. Also, if the account is already assigned to territories as a result of assignment rules, checking this box removes the account from those territories. This checkbox only affects rule-based account assignments and has no effect on manual account assignments. See <a href="#">Territory Management</a> on page 194.	
Fax	Fax number. Up to 40 characters are allowed in this field.	
Fax Opt Out	Whether the contact wants to be included in broadcast faxes.	✓
First Name	The first or given name of the individual. Up to 40 characters are allowed in this field.	✓
Home Phone	The contact's home phone number. Maximum 40 characters.	✓
Industry	Primary business of account. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Last Name	The surname or family name of the individual. Up to 80 characters are allowed in this field.	✓
Lead Source	The record source: for example, Advertisement, Partner, or Web. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters for each picklist value.	✓
Mailing City	The city in the mailing address. Maximum 40 characters.	✓
Mailing Country	The mailing country for the address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	✓
Mailing State/Province	The mailing state or province for the address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	✓

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

Field	Description	Is Contact Field
	administrator. Each picklist value can have up to 40 characters.	
Phone	Primary phone number of account. Up to 40 characters are allowed in this field.	
Rating	Categorization of how you rate this account, for example, Hot, Cold. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Salutation	The title for addressing the contact, for example, Mr., Ms., or Dr. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters.	✓
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed.	
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.	
Shipping State/Province	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.	
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed.	
Shipping Zip/Postal Code	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed.	
SIC Code	Standard Industrial Classification code of the account's main business categorization. Up to 10 characters are allowed in this field.	
Suffix	Name suffix of the individual. Up to 40 characters are allowed for this field.	✓
	 <b>Note:</b> To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User Interface</i> in the Quick Find box, then select <b>User Interface</b> . Then select <b>Enable</b>	

Field	Description	Is Contact Field
	Name Suffixes for Person Names.	
Territories	The territories to which the account has been assigned. See <a href="#">Territory Management</a> on page 194.	
Ticker Symbol	The abbreviation used to identify publicly traded shares of a particular stock. Also known as the stock symbol. Up to 20 characters are allowed in this field.	
Title	The contact's position within the organization. Maximum 80 characters.	✓
Type	Type of account, for example, Customer, Competitor, or Partner. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Website	URL of account's website, for example, www.acme.com. Up to 255 characters are allowed in this field; only the first 50 are displayed.	

## SEE ALSO:

[Accounts](#)

## Account History

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

SEE ALSO:

[Accounts](#)

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To view accounts:

- Read on accounts

## Considerations for Using Account Hierarchy

All hierarchies display accounts related via the Parent Account field. Keep these considerations in mind when you create account hierarchies.

IN THIS SECTION:

[Considerations for Using Account Hierarchy in Lightning Experience](#)

Keep these considerations in mind when you use Lightning Experience to create account hierarchies.

[Considerations for Using Account Hierarchy in Salesforce Classic](#)

Keep these considerations in mind when you use Salesforce Classic to create account hierarchies.

SEE ALSO:

[Account Fields](#)

[Guidelines for Creating Accounts](#)

## Considerations for Using Account Hierarchy in Lightning Experience

Keep these considerations in mind when you use Lightning Experience to create account hierarchies.

### Accounts with Multiple Locations

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

### Accounts in Divisions

If divisions are enabled, you can use the Parent Account field to relate accounts in different divisions.

### Display of Accounts

The Account Hierarchy page displays up to 2,000 accounts in Lightning Experience. (To view accounts in a different part of the hierarchy, enter the hierarchy from a different account.) The hierarchy doesn't display details of accounts you don't have permission to view.

### Person Accounts Not Supported

Person accounts aren't supported for the Parent Account field or the View Account Hierarchy action.

#### EDITIONS

Available in: Lightning Experience

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

#### USER PERMISSIONS

To view accounts:

- Read on accounts

## Considerations for Using Account Hierarchy in Salesforce Classic

Keep these considerations in mind when you use Salesforce Classic to create account hierarchies.

- An account hierarchy displays up to 500 child accounts in Salesforce Classic. The hierarchy doesn't display details of accounts you don't have permission to view.
- For companies with multiple office locations, you can also use the Account Site field to distinguish among the locations.
- If divisions are enabled, accounts that are related via the Parent Account field don't have to be in the same division.
- Person accounts aren't supported for the Parent Account field or the View Account Hierarchy action.
- To list an account as a subsidiary, edit the subsidiary account and type the name of an existing account in the Parent Account field. Alternatively, you can click the lookup icon to search for (or optionally, create) a parent account.

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To view accounts:

- Read on accounts

## Merge Duplicate Accounts

Merge multiple accounts into one so you can keep your data clean and focus on closing deals.

### IN THIS SECTION:

[Guidelines and Considerations for Merging Duplicate Accounts](#)

Keep these considerations in mind when you merge duplicate account records.

[Merge Duplicate Accounts in Lightning Experience](#)

Merge multiple accounts into one using Lightning Experience.



[Merge Duplicate Accounts in Salesforce Classic](#)

Merge multiple accounts into one using Salesforce Classic.

## SEE ALSO:

[Guidelines and Considerations for Merging Duplicate Accounts](#)[Considerations for Merging Accounts Associated with Relationship Groups](#)

## Guidelines and Considerations for Merging Duplicate Accounts

Keep these considerations in mind when you merge duplicate account records.

• [Merging Duplicate Accounts: Tips and Gotchas \(Salesforce Classic\)](#)

### General

#### Who Can Merge

You can merge accounts if you're a Salesforce admin, the account owner, or a user above the account owner in the role hierarchy. You also must have the appropriate user permissions. (The permissions are "Delete" on accounts and "Edit" on related objects, such as opportunities and cases.)

#### Sharing Rules

In Professional, Enterprise, Unlimited, Performance, or Developer edition orgs, any sharing rules are applied to the merged account. Also, any manual sharing from the master record is applied to the merged account.

#### Redundant Relationships

If you try to merge accounts that are indirectly related to the same contact, Salesforce displays a message suggesting that you remove the redundant relationships. On account records, indirect relationships are managed from the Related Contacts related list.

#### Related Items, Chatter Feeds, and Attachments

When duplicate records are related to items such as campaigns or activities, Salesforce relates the items to the merged record, with some exceptions. Chatter feeds are retained from the master record only. Attachments in Chatter feeds are retained in Salesforce but aren't associated with the merged record. To associate the dropped files with the merged record, find them in Files home (in Lightning Experience) or the Files tab (in Salesforce Classic). Then add them to the Files related list on the merged record.

#### Hidden and Read-Only Fields

Salesforce retains any data in hidden or read-only fields, such as sharing settings, from the master record. Hidden fields aren't shown while you merge. A merged record retains the `Created By` user and `Created Date` from the oldest record merged, regardless of which record is the master. The record shows the merge date as the `Last Modified By` date.

#### Account Hierarchy

In Lightning Experience, you can choose the parent account to retain. In Salesforce Classic, the merged account retains the account hierarchy from the master record.

#### Non-Master Accounts

The non-master accounts are moved to the Recycle Bin.

#### Divisions

If divisions are enabled in your org, the merged account is assigned to the division from the master record unless you select otherwise.

#### Relationship Groups

Lightning Experience doesn't support merging of accounts associated with relationship groups.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

## Team Members

### Team Members from Non-Master Accounts

The merged account retains all the team members from non-master accounts, even if the members are from different teams.

### Permission to Merge on Teams

To merge accounts to which a team member has greater record level access than you do, you must have the “Modify All Data” permission on accounts. For example, suppose that you’re the account owner but an account team member has more access than you on any account child records. You need the “Modify All Data” permission to merge those accounts.

## Person Accounts


### No Support for Merging Person Accounts in Lightning Experience

Lightning Experience doesn’t support merging of person accounts.

### Portal Support

You can’t merge person accounts that are enabled to use portal or community users.

### Person Accounts and Business Accounts in Salesforce Classic

In Salesforce Classic, if person accounts are enabled in your org, both business accounts and person accounts are returned when you search for duplicates. However, you can’t merge a person account with a business account or the opposite. Person accounts display the person account icon (  ).

### Redundant Relationships

In Salesforce Classic, if you try to merge person accounts that are indirectly related to the same contact or account, Salesforce displays a message suggesting you remove the redundant relationships. Indirect relationships with accounts and indirect relationships with contacts are evaluated separately. If you have conflicts with both, you must resolve them separately.

## Communities

- To merge accounts associated with communities, you must have the “Manage External Users” permission. You also need permissions to delete accounts and edit related records such as opportunities and contacts.
- When you merge accounts that have contacts associated with a community, the contacts must belong to the same type of community.
- When you merge accounts that have contacts associated with multiple communities of the same type, a contact's access to a specific community doesn’t change. A community user's profile determines the community they can access.
- When you merge a non-partner account with a partner account, the partner account must be selected as the master record.
- When you merge a partner account with a non-partner account, the owner can’t be changed.
- To ensure that the merged account includes contacts associated with a community, select the account with community users as the master record.

## Territory Management (Salesforce Classic Only)

This information applies to the original Territory Management feature only, and not to [Enterprise Territory Management](#).

- If none of the original accounts have `Exclude from account assignment rules` selected, then account assignment rules run on the merged account to determine its territories. Also, any territories that were manually added to the non-master accounts are manually added to the new account.
- If at least one of the original accounts has `Exclude from account assignment rules` selected, then the following happens.
  - Account assignment rules don’t run on the merged account.
  - The merged account inherits all the territories from the non-master accounts.

- If assignment rules were used to assign territories to the non-master accounts, it appears as if assignment rules are also used to assign territories to the newly merged account, even if the rules don't apply to the merged account.
- If a territory was manually assigned to one of the non-master accounts, the territory is manually assigned to the merged account.
- If a territory was added to one account manually and to another account by rules, the territory is manually added to the merged account.

### Enterprise Territory Management (Salesforce Classic Only)

This information applies to the Enterprise Territory Management feature only, and not to the [original Territory Management](#).

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

#### SEE ALSO:

[Merge Duplicate Accounts](#)

[Account Teams](#)

[What Is a Person Account?](#)

[Considerations for Merging Accounts Associated with Relationship Groups](#)

## Merge Duplicate Accounts in Lightning Experience

Merge multiple accounts into one using Lightning Experience.

1. Choose an account record. If duplicates exist, they're listed in a Potential Duplicates related list. Or click the **View Duplicates** link that appears on the account.
2. Choose up to three account records to merge. Click **Continue**.
3. Choose one account record as the master.
4. Choose the field values that you want to keep.
5. Confirm that you want to merge the records by clicking **Next**, and then click **Merge Accounts**.

### EDITIONS

Available in: Lightning Experience

Business accounts available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Person accounts aren't supported in Lightning Experience

### USER PERMISSIONS

To view accounts:

- Read on accounts

To merge business accounts:

- Delete on accounts

AND

Edit on related objects, such as opportunities and cases

## Merge Duplicate Accounts in Salesforce Classic

Merge multiple accounts into one using Salesforce Classic.

1. From the Accounts tab, click **Merge Accounts** in the Tools section. If you don't see the merge option, ask your admin to check your user permissions.
2. To find the duplicate accounts, enter a search string. Then click **Find Accounts**.
3. Select up to three accounts you want to merge. Then click **Next**.
4. Select one account as the master record.
5. Select the fields that you want to retain from each record. Fields with conflicting values are highlighted.
6. Click **Merge**.

### EDITIONS

Available in: Salesforce Classic

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

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

### USER PERMISSIONS

To view accounts:

- Read on accounts

To merge business accounts:

- Delete on accounts

AND

Edit on related objects, such as opportunities and cases

To merge person accounts:

- Delete on accounts

AND

Read on contacts

## Considerations for Merging Accounts Associated with Relationship Groups

Merging multiple accounts into one helps you keep your data clean so you can focus on closing deals. Here's what you need to know about merging accounts that are members of relationship groups.

- An account can't exist more than once in the same relationship group.
- The account you select as the master record retains its original relationship group memberships. For example, if the master record "Joseph Bannon" was a member of the "Bannon Family" and "Bannon Law Firm" relationship groups, it remains a member of those relationship groups.
- The master record replaces the non-master records in all other relationship groups involved in the merge. For example, if the non-master record "Joe Bannon" was a member of "Bannon Trust Beneficiaries," the master record is transferred Joe Bannon's membership in Bannon Trust Beneficiaries.
- If there is a relationship group to which the master record did not originally belong but the multiple non-master records belong, the master record is transferred the membership of the non-master account that had higher priority (primary versus secondary) or the account whose member record was most recently modified in the relationship group. For example, if the non-master records "JR Bannon" and "Joe Bannon" both were members of "Acme LLP" and JR Bannon was primary, then the master record is transferred JR Bannon's membership in Acme LLP. Alternatively, if neither JR Bannon or Joe Bannon was primary or secondary but JR Bannon's member record in the relationship group was modified more recently, then the master record would be transferred JR Bannon's membership in Acme LLP.

### EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

### USER PERMISSIONS

To merge business accounts:

- Delete on accounts

To merge person accounts:

- Delete on accounts, Read on contacts

### SEE ALSO:

[Merge Duplicate Accounts](#)

[Removing Members from Relationship Group Members](#)

## Sharing Accounts

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

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

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

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

Alternatively, you can share account access by creating an [account team](#).

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

### EDITIONS

Available in: Salesforce Classic

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

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

- For manual sharing rules that you created, click **Edit** or **Del** next to an item in the list to edit or delete the access level. For accounts, you can also edit the “Owner” sharing rule.

SEE ALSO:

- [Territory Management](#)
- [Account Teams](#)

## Record Translated Names

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

For example, you can store the name of an account in the default language in your Salesforce org and the account’s or user’s language. The following fields can have corresponding local names:

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

### EDITIONS

Available in: Salesforce Classic

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

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

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

SEE ALSO:

- [Accounts](#)

## Changing the Territories of an Account

To modify an account's manually assigned territories:

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

SEE ALSO:

[Territory Management](#)

### EDITIONS

Available in: Salesforce Classic

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

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

Territory management available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

### USER PERMISSIONS

To change the territories of an account:

- **Manage Territories**
- OR


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



## Change a Record's Owner

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

1. On the record detail page, click the link to change the owner.  
If you don't see the link, you don't have permissions to change record ownership.
2. Enter or select a new owner. In organizations where the Salesforce Customer Portal or partner portal is enabled, you can filter the results that appear on the user lookup dialog. Select either a queue or group of users from the `Owner` or `Assigned To` drop-down list.

 **Note:** You can only enter or select users who have permission to own the record. The User group and the Roles and Internal Subordinates group don't contain Customer Portal or partner users.

3. To notify the new owner, select the `Send Notification Email` checkbox.  
The "From" email address displayed in the notification is your return email address set in your email settings.  
  
For cases in Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, the `Case Assigned Template` setting specified in Support Settings determines the email text. For other records, the email text is generated automatically and cannot be customized.

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

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

EDITIONS


Available in: Salesforce Classic and Lightning Experience


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

USER PERMISSIONS

To transfer single records:

- `Transfer Record`

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

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

#### 5. Save your owner changes.


If your organization-wide default sharing for an object is set to Private, you see an error after changing the owner of a record for that object. The error occurs because you no longer have access to the record. This error is safe to ignore.

SEE ALSO:

[Transfer of Associated Items](#)

## Transfer of Associated Items

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

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

Record Type	Associated items that are also transferred
Accounts	<p>Contacts, contracts with <i>Draft</i> status, attachments, notes, open activities, and orders with <i>Draft</i> status that are either associated with a transferring contract or no contract. Depending on your selections, this can also include open opportunities not owned by the current account owner, closed opportunities, open cases owned by the existing account owner, and closed cases.</p> <p>When a partner account is transferred, partner users associated with that account are moved into the role hierarchy beneath the new owner.</p>

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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



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

SEE ALSO:

[Change a Record's Owner](#)

## Finding Account-Related Information (Related Lists)

### USER PERMISSIONS

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

### EDITIONS

Business accounts available in: Both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

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

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

## Viewing Related Lists

What related lists you see depends on several things.

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

SEE ALSO:

[Accounts](#)

## Working Together on Accounts

### Account Teams

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

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

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

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

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

#### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

## IN THIS SECTION:

[Add Account Team Members](#)

Add team members to an account so that the people who work together on the account can easily collaborate and track progress.

[Considerations for Removing Account Team Members](#)

Before you delete a member from an account team, make sure you're aware of these considerations.

[Guidelines for Setting Up Default Account Teams](#)

Save time by setting up a default account team—a group of coworkers you typically work with on account. Then add the team to accounts that you own.

[Account Team Fields](#)

An account team member has the following fields, listed in alphabetical order. Your page layout and field-level security settings determine which fields are visible and editable.

## Add Account Team Members

Add team members to an account so that the people who work together on the account can easily collaborate and track progress.

Who can manage the account team members depends on the users' access. Account record owners and users above the owner in the role hierarchy can add, edit, and delete team members. In Salesforce Classic, other users with edit access on the account can only add team members. In Lightning Experience, other users with edit access on the account can add and edit team members, but only changes to the Team Role field are saved.

Record owners and users above the owner can also grant team members higher access to the record.

1. From the Account Team related list on an account, click to either add a team member or a default account team. If you don't see the Account Teams related list, ask your admin to add it to your page layout.
2. Fill in the information, including the user or default team. High-volume portal users can't be added to teams.



**Note:** The access level can't be less restrictive than your org's default account access level. The options available to you vary depending on your org's sharing model and whether you're using Salesforce Classic or Lightning Experience. Regardless of sharing access, account team members must also have the Read permission on accounts to view accounts that list them as members.

3. Save the information.

## SEE ALSO:

[Account Team Fields](#)[Guidelines for Setting Up Default Account Teams](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To add team members to an account:

- Read on users

AND

Edit on accounts

To view accounts as team members:

- Read on accounts

## Considerations for Removing Account Team Members

Before you delete a member from an account team, make sure you're aware of these considerations.

- For each account you own, you can remove any team member from the account team.
- Unless specified, removing a member of your account team does not remove that person from your opportunity teams.
- If a team member is on your default account team and you remove him or her from a specific account, those changes only affect that account. The setup of your default account team does not change. To remove users from your default account team, see [Guidelines for Setting Up Default Account Teams](#) on page 43.
- If a user on an account team has Read/Write access (**Account Access**, **Contact Access**, **Opportunity Access**, and **Case Access**) and is deactivated, the access will default to Read Only if the user is reactivated.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view accounts:

- Read on accounts

To remove team members:

- Read on users

AND

Edit on accounts

AND

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

### Guidelines for Setting Up Default Account Teams

Save time by setting up a default account team--a group of coworkers you typically work with on account. Then add the team to accounts that you own.

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

- To set up a default account team, access Advanced User Details in your personal settings.
- The access levels of the records can only grant the same or wider access than your organization's default access. However, at least one of the access levels must be set to a wider access than the organization's defaults. For example, if the organization-wide defaults for your contacts, opportunities, and cases are set to Private, then at least one of them must be set to a wider access for the account team members.
- `Contact Access` is not available when the organization-wide default for contacts is set to Controlled by Parent.
- While you're defining your default opportunity team, you can choose to automatically add it to all your open opportunities. If you don't choose this option, you add the default team from the Opportunity Team related list of your opportunities.
- Clicking **Add Default Team** adds the default team of the opportunity owner, not of the user who clicks the button.
- Salesforce admins and users above you in the role hierarchy can add your default opportunity team to opportunities that you own.

SEE ALSO:  
[Account Teams](#)

### Account Team Fields

An account team member has the following fields, listed in alphabetical order. Your page layout and field-level security settings determine which fields are visible and editable.

Field	Description
<code>Account Access</code>	The level of access that a team member has to the account. The access level can be read/write or read only, but it can't be less than your Salesforce org's default account sharing access.
<code>Case Access</code>	The level of access that a team member has to the cases associated with the account.
<code>Contact Access</code>	<p>The level of access that a team member has to the contact. The access level can be read/write or read only, but it can't be less than your Salesforce org's default contact sharing access.</p> <p><code>Contact Access</code> is not available when the organization-wide default for contacts is set to Controlled by Parent.</p>

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up default account teams:

- Read on opportunities

To add default account teams to accounts:

- Read on accounts

AND

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Field	Description
Opportunity Access	The level of access that a team member has to the opportunities associated with the account.
Team Member	The user who's listed as part of the team.
Team Role	The role that the team member plays for the account, such as Account Manager.

SEE ALSO:

[Add Account Team Members](#)

## Syncing Prospects, Contacts, and Leads with Pardot

### Getting Started with the Salesforce Connector

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

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

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

#### EDITIONS

Available in: Salesforce Classic

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

### Setting Up the Salesforce Connector

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

Choose the option that best describes your situation.

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

#### EDITIONS

Available in: Salesforce Classic

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



Prepare Salesforce for Connecting to Pardot

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

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

If you're installing the Pardot AppExchange package for a

You need to

Production environment	<ol style="list-style-type: none"><li>1. Go to the <a href="#">Pardot AppExchange package</a> for production environments.</li><li>2. Click <b>Continue</b> to install the package.</li><li>3. When prompted for your username and password, enter your production username and password.</li><li>4. Review the actions and click <b>Deploy</b> to complete the installation.</li><li>5. Confirm with your Salesforce administrator you have read permissions for ObjectChangeLogs.</li></ol>
Sandbox environment	<ol style="list-style-type: none"><li>1. Log out of Salesforce.</li><li>2. Go to the <a href="#">Pardot AppExchange package</a> for sandbox environments.</li><li>3. When prompted for your username and password, enter your sandbox username and password.</li><li>4. Click <b>Continue</b> to install the package.</li><li>5. Review the actions and click <b>Deploy</b> to complete the installation.</li><li>6. Confirm with your Salesforce administrator you have read permissions for ObjectChangeLogs.</li></ol>

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

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

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

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

Start IP Address	End IP Address
67.228.95.145	67.228.95.145

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic

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

Start IP Address	End IP Address
67.228.168.139	67.228.168.141
67.228.223.106	67.228.223.107

Add the Connector to Pardot

Add and manage connector settings directly in Pardot.

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

1.

In Pardot, hover over **Admin**, then click **Connectors**.
2.

Click **+ Add Connector**.
3.

Select Salesforce.
4.

Type a name for the connector.  
Use a name that makes it easy for you to identify your connector.  
*Example:* Salesforce Connector)
5.

Type your Salesforce username and password.  
Keem in mind that when your Salesforce password changes, you’ll need to update the Salesforce password for your connector.

Options for Customizing the Connector

Customize the connector based on your preferences.

Select any of these options to customize your connector.

The option	Which
Automatically create prospects in Pardot if they’re created in Salesforce	<p>Enables a trigger to set any newly created leads or contacts in Salesforce to sync to Pardot. This won’t happen for historical leads or contacts—only for those created after installing the Pardot AppExchange package in Salesforce, and will work only for leads and contacts created with an email address.</p> <p>If this feature is enabled later on, any leads and contacts with email addresses that were created after the Pardot package was installed in Salesforce will be pushed down to Pardot. Select a default campaign from the dropdown for any prospect created with this option.</p>
Automatically change emails in Pardot to reflect changes in Salesforce	<p>Automatically updates email addresses for Pardot prospects if an email address of a lead or contact is updated in Salesforce.</p> <p>Learn more about keeping email address updates in sync in <a href="#">About Email Address Updates Between Salesforce and Pardot</a>.</p>

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS


To create records:

- Create, Update, and Read on contacts and leads

EDITIONS

Available in: Salesforce Classic


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

The option	Which
Automatically match Salesforce users to Pardot users	Lets you send emails from any user fields, including, for example, support contacts and account managers.  Learn how to set up this functionality is <a href="#">Send Emails from Salesforce</a> .
Exclude Salesforce Partner and Customer Portal users from Prospect assignment	Prevents Salesforce Partner and Customer Portal users from displaying in the “CRM Username” dropdown when you edit a user in Pardot.
Allow editing of Prospect lists within the CRM	Lets users add and remove Pardot prospects from within Salesforce. If you check this box, you must add the Visualforce elements to your Leads and Contacts page layouts.
Connect to a Salesforce sandbox account	Let's you connect to a sandbox environment.
Sync emails with the CRM	Automatically logs an activity for every email sent to a prospect (list, drip, autoresponder and 1-to-1 prospect emails).   <b>Note:</b> This can quickly fill up your activity views, especially on an account object. Disabling <b>Email Logging in Pardot</b> is not retroactive. If the email logging may interfere with your workflow in Salesforce, we recommended that you do not enable this option.
Sync plugin emails with the CRM	Logs an activity for emails you send through Pardot for Microsoft® Outlook®, our Thunderbird extension, our Apple Mail plug-in, or our add-in for Gmail.
Enable Salesforce emails for task creation	Lets you send a notification email to users when a task is created.
Enable Salesforce emails for assignment rules	Lets Salesforce send a notification email to users when assignment rules run.
Enable Salesforce emails for user and queue assignments	Lets Salesforce send a notification email to users when an assignment takes place for a user or queue.

## Set Up the Connector to Sync with Sandbox Environments

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

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

1. In Pardot, hover over **Admin**, then click **Connectors**.
2. In the row for your Salesforce connector, click , then **Edit**.
3. In the **Username** field, append `.NSPARDOT` to your username.  
(Example: christina.wills@pardot.com.NSPARDOT)
4. If your sandbox password differs from your password in production, enter your sandbox one in the **Password** field.
5. Select the option **Connect to a Salesforce sandbox account**.

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

### EDITIONS

Available in: Salesforce Classic

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

## Whitelist Pardot IP Addresses in Salesforce

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

Complete this procedure only if it is the first time you're establishing your connector, and your organization restricts IP access at the User Profile level. You need administrative rights in Salesforce for this procedure.

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

Start IP Address	End IP Address
136.147.104.20	136.147.104.23
136.147.96.20	136.147.96.23

### EDITIONS

Available in: Salesforce Classic

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

## Turn On the Connector

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

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

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

### EDITIONS

Available in: Salesforce Classic

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

## Map Custom Leads Fields to Contacts Fields

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

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

1. From the object management settings for leads, go to the fields area, and then click **Map Lead Fields**.
2. For each custom lead field, choose a custom account, contact, or opportunity field into which you want the information inserted when you convert a lead.
3. Click **Save**.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

## Setting Up Pardot Custom Fields in Salesforce

Get your custom Pardot fields to appear in Salesforce.

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

### EDITIONS

Available in: Salesforce Classic

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

## Add Sections to Leads and Contacts Page Layouts

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

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

### EDITIONS

Available in: Salesforce Classic

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

## Set Up Salesforce to Add Campaign Prospects to Pardot

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

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

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

## Set Up Salesforce for Adding Leads and Campaigns to Pardot

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

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


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

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

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

## Assign Your Salesforce Username to the Connector

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

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

## Set Up Single Sign-On for Salesforce and Pardot

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

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

### EDITIONS

Available in: Salesforce Classic

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

### EDITIONS

Available in: Salesforce Classic

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

### EDITIONS

Available in: Salesforce Classic

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

## Send Emails from Salesforce

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

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

In	Do this
Salesforce	<ol style="list-style-type: none"> <li>1. Create the field you'd like to use to contain your CRM User Value, e.g. Relationship Manager, on the lead or contact record in Salesforce. This field should be the type "Lookup Field." If you already have the field created, make sure that it's a "Lookup Field" and that it's successfully populated.</li> <li>2. Populate the lookup field with the user.</li> </ol>
Pardot	<ol style="list-style-type: none"> <li>1. Create matching user seats for any Salesforce users.</li> <li>2. On the user record, map the Pardot user seat to the Salesforce user. This lets Pardot to infer information about the user for variable tags when sending the email.</li> <li>3. Create a custom field in Pardot with the designated type "CRM User" to hold the field values on the prospect record. This field is a read-only field in Pardot.</li> <li>4. Map the custom field to the corresponding salesforce.com field.</li> </ol>






### EDITIONS

Available in: Salesforce Classic

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

## About Email Address Updates Between Salesforce and Pardot

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

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

### What Syncs when Email Addresses are Missing in Salesforce or Pardot

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

### EDITIONS

Available in: Salesforce Classic

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

## Understand Sync Options for Pardot Accounts and Salesforce Person Accounts

Easily sync leads between the two systems after you assign your Pardot prospects to users. Consider these options before you sync Pardot accounts and Salesforce person accounts.

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

Available in: Salesforce Classic

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



## Sync Leads between Pardot and Salesforce

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

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

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

## Tracking Prospects as Salesforce Contacts

Automatically create contacts in Salesforce from your Pardot prospects.

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

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

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic

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

## Tracking the Products Your Customers Buy

### What Are Assets?

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

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

You can introduce hierarchy to assets in your org to represent more complex products. An asset hierarchy can contain up to 10,000 assets. Define relationships between assets using the `Parent Asset` field on assets.

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

#### SEE ALSO:

[Getting Started with Assets](#)

[Viewing Asset Lists](#)

### Getting Started with Assets

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

To implement assets for your organization:

- Add the Assets tab to your home page.



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

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

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

- Optionally, customize asset fields and page layouts from Setup by entering *Assets* in the **Quick Find** box, then selecting **Assets**.

SEE ALSO:

[What Are Assets?](#)

## Displaying the Assets Tab

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

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



- From Setup, click **Administer | Manage Users | Profiles**.
- Click **Edit** next to the user profile that you want to update.
- In the Tab Settings list, change the setting for Assets to *Default On*.
- Click **Save**.

Now users with the updated profile can see the Asset tab in the All Tabs page and can add the Assets tab to their home pages.

## Viewing Asset Lists

You can display a list of assets by opening the Assets tab. You also can display a list of assets by going to the Products tab and clicking a view from the Asset Views section.

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 view. To edit or delete any view you created, select it from the View drop-down list and click **Edit**.

- Click an asset name to view the detail. Click **Edit** or **Del** to [edit or delete the asset](#). For information on deleting assets, see [Deleting Assets](#) on page 58.
- If Chatter is enabled, click  or  to follow or stop following an asset in your Chatter feed.

SEE ALSO:

[What Are Assets?](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view tab settings:

- View Setup and Configuration

To edit tab settings:

- Manage Profiles and Permission Sets

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view assets:

- Read on assets

To change assets:

- Edit on assets

## Displaying and Editing Assets

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

### Displaying Assets

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

### Viewing Asset Updates and Comments (Chatter)


Display a Chatter feed of updates, comments, and posts about the asset.

### Editing Assets

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

### Asset Related Lists

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


 **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.

### Printing Assets

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

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

You can enter person accounts in either the **Account** or **Contact** fields of an asset. The Assets related list on a person account includes all assets related to the person account, including those where the person account is in the **Contact** field.

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

### SEE ALSO:

[Asset Fields](#)

[Viewing Asset Lists](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view assets:

- Read on assets

To change assets:

- Edit on assets

## Creating Assets

1. Click **New** on the Assets home page or on the Assets related list of an account, contact, or product. This action automatically inserts the account name, contact name, or product name, depending on the record you selected when you clicked **New**.

2. To associate the asset with a product, enter the exact product name. If the product name is unique, Salesforce automatically inserts this name in the `Asset Name` field.

If you do not know the name of the product:

- a. Click the `Product` lookup icon if the asset is based on a product.
- b. Enter a search filter to find a current product, and click **Go!**.
- c. Select the appropriate product. Salesforce automatically inserts the selected product name in the `Asset Name` field.

3. Enter a name for the asset.

4. Choose the account or contact for the customer who has purchased the asset.

If necessary, you can choose both an account and a contact that are not related. The asset displays on the contact selected on the asset as well as the account selected on the asset. However, it doesn't display on the account of the contact. If you only choose a contact, the asset displays on both the contact and the contact's account.

5. Optionally, select a parent asset. This field is useful if the asset you are creating is a component of another asset. For example, a "tent" asset could be the parent of a "rain fly" asset and a "tent pole set" asset. Creating hierarchical relationships between assets lets you track when an asset component was last replaced, link work order line items to child assets, and more.



### Note:

- An asset hierarchy can contain up to 10,000 assets.
- Depending on how assets are set up in your org, the `Parent Asset` field may need to be added to the asset page layout.

6. To create an asset for a competitor's product, check `Competitor Asset`.

7. Click **Save**.

You can enter person accounts in either the `Account` or `Contact` fields of an asset. The Assets related list on a person account includes all assets related to the person account, including those where the person account is in the `Contact` field.

### SEE ALSO:

[Asset Fields](#)

[Cloning Assets](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view assets:

- Read on assets

To create assets:

- Create on assets

## Cloning Assets

Use the **Clone** button on an asset to quickly create a new asset with the same information as the selected asset. To clone an asset for your organization:

1. Click **Clone** on an existing asset.
2. Enter or change any information for the new asset.
3. Click **Save**.



**Note:** If you have read-only access to a field, the value of that field is not carried over to the cloned record.

SEE ALSO:

[Asset Fields](#)

## Deleting Assets

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

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

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

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

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

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

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

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

- **Does the asset have a parent asset and child assets?**

If you delete an asset with both a parent asset and child assets, keep in mind that its parent and children will no longer be linked in an asset hierarchy.



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

To delete an asset:

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

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view assets:

- Read on assets

To create and clone assets:

- Create on assets

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view assets:

- Read on assets

To delete assets:

- Delete on assets

To recover deleted assets:

- Delete on assets


3. Click **OK**.

SEE ALSO:

[What Are Assets?](#)

## Asset Fields


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

Field	Description
Asset Division	Division to which the asset belongs. This value is automatically inherited from the related account if any. Otherwise the value is inherited from the related contact. Available only in organizations that use divisions to segment their data.
Asset Level	<p>The asset's position in an asset hierarchy. If the asset has no parent or child assets, its level is 1. Assets that belong to a hierarchy have a level of 1 for the root asset, 2 for the child assets of the root asset, 3 for their children, and so forth.</p> <p> <b>Note:</b> On assets created before Summer '17 that are part of an asset hierarchy, the asset level defaults to -1. Once the asset record is updated, the asset level is calculated and automatically updated.</p>
Asset Name	Identifying name for the asset. In Salesforce Classic, if you select a product from the product lookup, this name is automatically populated with the product name.
Account	Account associated with the asset. Each asset must be associated with an account or contact.
Contact	Contact associated with the asset. Each asset must be associated with an account or contact. If you choose both an account and contact, they do not need to be related to each other. Contacts that are not associated with an account cannot be linked to assets.
Competitor Asset	Checkbox to indicate if the asset represents a competitor's product. Use assets to track what customers have your competitor's products using this checkbox.
Description	Text that distinguishes this asset from others.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
Install Date	Date the customer installed the asset.
Owner	Individual user to which the asset is assigned. By default, the asset owner is the user who created the asset record.
Parent Asset	The asset's parent asset.  <b>Tip:</b> View, create, and delete an asset's child assets in the Child Assets related list.
Price	Amount the customer paid for the asset.
Product	The product on which the asset is based.
Purchase Date	Date the customer bought the asset.
Quantity	The number of assets purchased.
Root Asset	Read Only. The top-level asset in an asset hierarchy. Depending on where an asset lies in the hierarchy, its root might be the same as its parent.
Serial Number	The model number on the asset.
Status	State of the asset.
Usage End Date	The date the asset expires or the last date it is under warranty. Use this field to store whatever date is appropriate for your business.

## SEE ALSO:

[Creating Assets](#)[Cloning Assets](#)

## Set Field History Tracking on Assets

Track changes to asset records by enabling field history tracking.

Use field history tracking to see information about:

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

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

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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



## Specify the Asset Owner for Assets

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

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

If you activated Salesforce before Spring '15, you can automatically update the asset owner field on asset records when you enable the Asset object sharing preference. The sharing preference sets the value of the asset owner field to equal either:

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

By default, the `Asset Owner` field doesn't appear on the page layout. To add the `Asset Owner` field to the page layout, from the object management settings for assets, go to Page Layouts.

1. From Setup, enter *Asset Settings* in the *Quick Find* box, then select **Asset Settings**.
2. Select the option *Enable Asset Sharing*.  
The options for setting the default `Asset Owner` field appear for newly created asset records.
3. Set the `Asset Owner` to be either:
  - Creator of the asset
  - Owner of the parent account
4. Save your changes.

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

## Searching for Assets

1. Enter your search terms in the sidebar or header search box.
2. Click **Search**.
3. From the search results, click an item to open it or click **Edit**, if available.

You can also create an asset list view from the Products tab to find assets that match specific criteria.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To enable sharing:

- Manage Sharing

To create, edit, and delete page layouts:

- Customize Application

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view assets:

- Read on assets

## Enabling Sharing Rules for Assets

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

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



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

1. From Setup, enter *Asset Settings* in the Quick Find box, then select **Asset Settings**.
2. Select the checkbox next to **Enable Asset Sharing**.
3. Click **Save**.

Now you can create and apply sharing rules on assets.

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

## Sharing Assets

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

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

On the Sharing Detail page, you can do any of the following:

- To show a filtered list of items, select a predefined list from the **View** drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the **View** drop-down list and click **Edit**.
- To grant access to the record for other users, groups, roles, or territories, click **Add**.



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

- Click **Expand List** to view all users that have access to the record.
- For manual sharing rules that you created, click **Edit** or **Del** next to an item in the list to edit or delete the access level.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To enable sharing:

- **Manage Sharing**

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS


To view assets:

- **Read on assets**

### Creating Asset Sharing Rules

Asset sharing rules can be based on the record owner or on other criteria, including record type and certain field values.

You can define up to 300 asset sharing rules, including up to 50 criteria-based sharing rules.

1. If you plan to include public groups in your sharing rule, confirm that the appropriate groups have been created.
  2. From Setup, enter *Sharing Settings* in the *Quick Find* box, then select **Sharing Settings**.
  3. In the Asset Sharing Rules related list, click **New**.
  4. Enter the **Label Name** and **Rule Name**. The Label is the sharing rule label as it appears on the user interface. The Rule Name is a unique name used by the API and managed packages.
  5. Enter the **Description**. This field describes the sharing rule. It is optional and can contain up to 1000 characters.
  6. Select a rule type.
  7. Depending on the rule type you selected, do the following:
    - **Based on record owner**—In the *owned by members of* line, specify the users whose records will be shared: select a category from the first drop-down list and a set of users from the second drop-down list (or lookup field, if your organization has over 200 queues, groups, roles, or territories).
    - **Based on criteria**—Specify the Field, Operator, and Value criteria that records must match to be included in the sharing rule. The fields available depend on the object selected, and the value is always a literal number or string. Click **Add Filter Logic...** to change the default AND relationship between each filter.
-  **Note:** To use a field that's not supported by criteria-based sharing rules, you can create a workflow rule or Apex trigger to copy the value of the field into a text or numeric field, and use that field as the criterion.
8. In the *Share with* line, specify the users who should have access to the data: select a category from the first drop-down list and a set of users from the second drop-down list or lookup field.
  9. Select a setting for *Asset Access*.
  10. In the remaining fields, select the access settings for the records associated with the shared assets.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create sharing rules:

- **Manage Sharing**

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

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

11. Click **Save**.

## Tracking the People You Work With

### Contacts

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

#### [Considerations for Creating Contacts](#)

Before you create contacts, consider a few key points.

#### [Guidelines for Viewing and Managing Contacts](#)

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

#### [Considerations for Using Contact Roles](#)

Contact roles let you specify the part that a person plays in an account, case, contract, or opportunity. When you use contact roles, you have more information about who to contact and when. There are some things to be aware of when using contact roles.

#### [Considerations for Changing the Account for Contacts](#)

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

#### [Merge Duplicate Contacts](#)

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

#### [Display Contact Hierarchies](#)

Give your sales team a key tool for planning their sales strategy by showing contacts in a hierarchy or org chart.

#### [Considerations for Deleting Contacts](#)

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

SEE ALSO:

[What Is a Person Account?](#)

### Considerations for Creating Contacts

Before you create contacts, consider a few key points.

- You can create a contact from several places in Salesforce.
  - Create a contact on an account's detail page.
  - [Import a contact](#) from a mobile device using the Salesforce1 app.
  - Create a contact from the Contacts area. You should always associate an account to the new contact. If you don't, the contact is private. Private contacts are accessible only to their owner and system administrators, which makes them hard to find and easy to forget.

#### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

#### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

- To create a contact that's automatically associated with an account, create the contact from the account's detail page.
- To track a contact's relationship with more than one account, use the Related Accounts related list to add additional account-contact relationships. By tracking all related accounts on a single contact record, you avoid creating duplicate contacts. Just make sure your admin has set up Contacts to Multiple Accounts.
- If your Salesforce org uses record types, you're sometimes prompted to choose a **Record Type** when creating a contact. Different record types can have different fields and picklist values.
- If your Salesforce org uses divisions, the division of a new contact is automatically set to the division of the related account.

SEE ALSO:

[Contacts](#)

[Import Contacts from Mobile Device Contact Lists into Salesforce](#)

[Contact Fields](#)

[Share Contacts](#)

## Guidelines for Viewing and Managing Contacts

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

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

If you're using Salesforce Classic:

- To define your own custom view, click **Create New View**.
- To edit or delete a view that you created, select it from the **View** drop-down list, and then click **Edit**.

- To make person accounts easy to find, create a custom list view, adding the **Is Person Account** icon as a column.
- If you're using Salesforce Classic, to [add contacts to a campaign](#), select the checkbox next to one or more contacts, and then click **Add to Campaign**. To select all displayed records, select the checkbox in the column header.

SEE ALSO:

[Contacts](#)

[Considerations for Changing the Account for Contacts](#)

[Share Contacts](#)

[Finding Out if Your Partners Use Salesforce](#)

[Accounts](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

### USER PERMISSIONS

To view contacts:


- Read on contacts

To create contacts:

- Create on contacts

## Considerations for Using Contact Roles

Contact roles let you specify the part that a person plays in an account, case, contract, or opportunity. When you use contact roles, you have more information about who to contact and when. There are some things to be aware of when using contact roles.

 **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.


- To view the contact records that are listed in the Contact Roles related lists, you must have the proper user permissions and sharing access to those records.
- When you add contact roles for opportunities, you can select from up to 50 contacts that are associated with the record's account.
- A single contact or person account can have a different contact role on different records.
- Adding person accounts to contact roles on accounts is available but not recommended. Instead, use the Partners related list to associate person accounts to other accounts.

SEE ALSO:

[Add and Manage Contact Roles](#)

## Considerations for Changing the Account for Contacts

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

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

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

If you don't meet any of these conditions, contact your admin to change the associated account.

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

For contacts that are enabled for portals, [review these considerations](#).

SEE ALSO:

[Contacts](#)

[Share Contacts](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

## Merge Duplicate Contacts

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

### [Merge Duplicate Contacts in Lightning Experience](#)

Merge duplicate contacts using Lightning Experience.

### [Merge Duplicate Contacts in Salesforce Classic](#)

Merge duplicate contacts using Salesforce Classic.

SEE ALSO:

[Considerations for Merging Duplicate Contacts](#)

[Considerations for Merging Contacts That Are Associated with Portal Users](#)

## Considerations for Merging Duplicate Contacts

Keep these considerations in mind when you merge duplicate contact records.

### Primary Account

In Lightning Experience, you can merge contacts that have different primary accounts unless the contact is associated with a portal user. In Salesforce Classic, you can merge only contacts that have the same primary account. The primary account is the account listed in the `Account Name` field on the contact record.

### Redundant Relationships

If you try to merge contacts that are indirectly related to the same account, Salesforce displays a message suggesting that you remove the redundant relationship. On contact records, indirect relationships are managed from the Related Accounts related list.

### Portal Users

When you use Lightning Experience to merge contacts associated with portal users, the portal user status isn't shown during merging. The merged record retains the portal user status of the master record. When you use Salesforce Classic to merge contacts associated with portal users, the portal user status is shown during merging. You choose the portal status you want to retain in the merged record. In both Lightning Experience and Salesforce Classic, the master contact must be associated with a portal user. The merged contact retains the portal user status of the master contact. If a non-master contact is associated with a portal user, that user is deactivated.

### Related Items, Chatter Feeds, and Attachments

When duplicate records are related to items such as campaigns or activities, Salesforce relates the items to the merged record, with some exceptions. Chatter feeds are retained from the master record only. Attachments in Chatter feeds are retained in Salesforce but aren't associated with the merged record. To associate the dropped files with the merged record, find them in Files home (in Lightning Experience) or the Files tab (in Salesforce Classic). Then add them to the Files related list on the merged record.

### Campaigns

If the duplicate contacts are members of different campaigns, the date in the `Member Status Updated` field is retained for each contact and associated with the merged contact.

### Hidden and Read-Only Fields

Salesforce retains any data in hidden or read-only fields, such as sharing settings, from the master record. Hidden fields aren't shown while you merge. A merged record retains the `Created By` user and `Created Date` from the oldest record merged, regardless of which record is the master. The record shows the merge date as the `Last Modified By` date.

#### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

### Non-Master Contacts

The non-master contacts are moved to the Recycle Bin.

#### SEE ALSO:

[Merge Duplicate Contacts](#)

[Contact Fields](#)

[Considerations for Merging Contacts That Are Associated with Portal Users](#)

### Considerations for Merging Contacts That Are Associated with Portal Users

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

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

#### EDITIONS

Available in: Salesforce Classic


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

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



## Merge Duplicate Contacts in Lightning Experience

Merge duplicate contacts using Lightning Experience.

1. Choose a contact record. If duplicates exist, they're listed in a Potential Duplicates related list. Or click the **View Duplicates** link that appears on the contact.
2. Choose up to three contact records to merge. Click **Continue**.
3. Choose one contact record as the master.  
 **Note:** In Lightning Experience, portal user status isn't shown during merging.
4. Choose the field values that you want to keep.
5. Confirm that you want to merge the records by clicking **Next**, and then click **Merge Contacts**.

### EDITIONS

Available in: Lightning Experience

Available in: **All Editions**

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

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

### USER PERMISSIONS

To merge contacts:

- Delete on contacts

To merge Customer Portal enabled contacts:

- Delete on contacts

AND

Edit Self-Service Users

To merge partner portal enabled contacts:

- Delete on contacts

AND

Manage Partners

## Merge Duplicate Contacts in Salesforce Classic

Merge duplicate contacts using Salesforce Classic.

1. From the Contacts related list of an account, click **Merge Contacts**.
2. Select up to three contacts to merge. Use the search box to refine the list, or click **All Contacts** to view the full list of contacts. Click **Next** to continue.
3. Select one contact as the master record.
4. If your organization uses a partner or customer portal, you can select which record you want to retain as the portal user. If you don't want the merged contact to include a portal user, select **Not a portal user**.
5. Select the fields values that you want to retain from each record. Fields with conflicting values are highlighted.
6. Click **Merge**.

See it in action:  [How to Merge Contacts in Salesforce](#)

## Display Contact Hierarchies

Give your sales team a key tool for planning their sales strategy by showing contacts in a hierarchy or org chart.

SEE ALSO:

[Contacts](#)

## Considerations for Deleting Contacts

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

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

### EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions

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

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

### USER PERMISSIONS

To merge contacts:

- Delete on contacts

To merge Customer Portal enabled contacts:

- Delete on contacts

AND

Edit Self-Service Users

To merge partner portal enabled contacts:

- Delete on contacts

AND

Manage Partners

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

- Tasks

Accounts, entitlements, and opportunities that are associated with the contact aren't deleted.

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

## Share Contacts

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

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

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

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

2. On the sharing detail page, do any of the following.

- To show a filtered list of items, select a predefined list from the **View** drop-down list, or click **Create New View** to define your own custom views.
- To edit or delete any view you created, select it from the **View** drop-down list and click **Edit**.
- Click **Expand List** to view all users that have access to the record.
- To grant access to the record for other users, groups, roles, or territories, click **Add**.
- For manual sharing rules that you created, click **Edit** or **Del** next to an item in the list to edit or delete the access level.

3. Save your changes.

SEE ALSO:

[Contacts](#)

[Guidelines for Viewing and Managing Contacts](#)

[Considerations for Changing the Account for Contacts](#)

[Considerations for Sharing and Accessing Contacts](#)

### EDITIONS

Available in: Salesforce Classic

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

## Considerations for Sharing and Accessing Contacts

Here's some things to know about sharing and accessing contact records.

- Contact sharing isn't available for organizations that have territory management or person accounts.
- You can't restrict access to contacts beyond your organization's default access levels.
- You need at least read access to the contacts and leads that you invite to an event. You need at least "Add Events" on a resource to invite it to an event.
- A contact that isn't linked to an account is always private, regardless of your organization's sharing model. Only the owner of the contact and administrators can view it. Sharing rules and workflow rules don't apply to private contacts. If your organization uses divisions, private contacts always belong to the global division.
- If a recipient doesn't have access to the account, you can't share the contact unless you also have permission to share the account.
- If your organization-wide default for contacts is set to Controlled by Parent, the `Contact Access` options aren't available when you share related records such as accounts. Instead, all access to contacts is determined by the user's access to the contact's account.
- If your organization-wide default for contacts is Controlled by Parent and your organization-wide default for accounts is Private, you can't view contacts for accounts that you don't own, even if you have the View All permission on the account object. However, if you own a contact on an account, you can view other contacts on the same account. (Access to a parent account gives you access to the associated child records.)

### EDITIONS

Available in: Salesforce Classic

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

## Contact Fields

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

Field	Description
Account Name	The account that the contact is linked to. Enter the account name, select the account from a list, or create an account. Private contacts don't have an account.
Allow Customer Portal Self-Registration	If you allow access to a customer portal, when selected, allows contacts to self-register for it.
Assistant	The contact's assistant. Maximum 40 characters.
Asst. Phone	The assistant's phone number. Maximum 40 characters.
Birthdate	The contact's birthday. Click the field, and then choose a date from the calendar.
Contact Currency	The default currency for all currency amount fields in the contact. Amounts are displayed in the contact currency and converted to the user's personal currency. Available when multiple currencies are used.


### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

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

Field	Description
Mailing City	The city in the mailing address. Maximum 40 characters.
Mailing Country	The country in the mailing address. Maximum 80 characters.
Mailing State/Province	The state or province in the mailing address. Maximum 80 characters.
Mailing Street	The street in the mailing address. Maximum 255 characters.
Mailing Zip/Postal Code	The zip or postal code in the mailing address. Maximum 20 characters.
Middle Name	<p>The contact's middle name, as displayed on the contact edit page. Maximum 40 characters.</p> <p>To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User Interface</i> in the Quick Find box, then select <b>User Interface</b>. Then select <b>Enable Middle Names for Person Names</b>.</p>
Middle Name (Local)	<p>The contact's middle name, translated into the local language.</p> <p>To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User Interface</i> in the Quick Find box, then select <b>User Interface</b>. Then select <b>Enable Middle Names for Person Names</b>.</p>
Mobile	The contact's mobile phone number. Maximum 40 characters.
Name	The contact's combined first name, middle name, last name, and suffix, as displayed on the contact detail page.
Other City	The city in another address for the contact. Maximum 40 characters.
Other Country	The country in another address for the contact. The entry is selected from a picklist of standard values or entered as text. If the field is a text field, maximum 80 characters.
Other State/Province	The state or province in another address for the contact. The entry is selected from a picklist of standard values or entered as text. If the field is a text field, maximum 80 characters.
Other Street	The street address in another address for the contact. Maximum 255 characters.
Other Zip/Postal Code	The zip or postal code in another address for the contact. Maximum 20 characters.
Other Phone	Another phone number for the contact. Maximum 40 characters.
Phone	The contact's primary phone number. Maximum 40 characters.
Reports To	The name of the contact's manager. Enter a contact name, or select a contact from the list.

Field	Description
Salutation	The title for addressing the contact, for example, Mr., Ms., or Dr. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters.
Suffix	The suffix in the contact's name, as displayed on the contact edit page. Maximum 40 characters.  To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User Interface</i> in the <i>Quick Find</i> box, then select <b>User Interface</b> . Then select <i>Enable Middle Names for Person Names</i> .
Title	The contact's position within the organization. Maximum 80 characters.
Username	For Self-Service contacts only. The <i>Username</i> defaults to the <i>Email</i> . Contacts enter their usernames when logging in to the Self-Service portal.   <b>Note:</b> 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.

## SEE ALSO:

[Considerations for Creating Contacts](#)[Considerations for Changing the Account for Contacts](#)

## Contact Role Fields

Contact Roles define the role that a contact or person account plays in an account, case, contract, or opportunity. A contact role has the following fields. Lightning Experience also includes an Opportunities field.

Field	Description
Contact	The name of the contact or person account. Select an existing contact or create a new one.
Primary	When selected, identifies the person as the primary contact for the record.  The <i>Primary</i> option isn't available for cases. Instead, the contact listed in the <i>Contact Name</i> field on the case record is automatically the primary contact.
Role	The role of the contact for the record. Your administrator can customize the selections for this picklist.

## EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

## Add and Manage Contact Roles

Specify the part that each contact or person account plays in your business process.

### [Add and Manage Contact Roles in Lightning Experience](#)


To specify the part that each contact plays in your business process, add contact roles to opportunities or contracts.

### [Add and Manage Contact Roles in Salesforce Classic](#)


To specify the part that each contact plays in your business process, add contact roles to accounts, cases, contracts, and opportunities.

## Add and Manage Contact Roles in Lightning Experience

To specify the part that each contact plays in your business process, add contact roles to opportunities or contracts.

 **Important:** In Lightning Experience, contact roles are available for opportunities and contracts. Although they 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.

1. Click **Add Contact Role** in the Contact Roles related list of a opportunity or contract.
2. Click the contact field to select a contact or person account. Optionally, click **New Contact** to create a contact.
3. Select a role for the contact. If you don't select a role, the contact is still added to the Contact Role related list and can be edited later.
4. Optionally, designate a primary contact for the record.
5. Save your changes.
6. Keep the record's contact roles up to date by editing and deleting them as needed.

 **Example:** At AW Computing, Mary Smith evaluates all proposals and then forwards them to Tom Jones for a final decision. In the opportunity record for AW Computing, you designate Mary Smith as the Evaluator and Tom Jones as the Decision Maker. Now you know who to contact first!

SEE ALSO:

[Considerations for Using Contact Roles](#)  
[Contact Role Fields](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

### EDITIONS

Available in: Lightning Experience

Available in all editions

### USER PERMISSIONS

To add or edit contact roles:

- Edit on the object the contact roles are on, such as accounts or opportunities

AND

Read on contacts


To view contact roles:

- Read on the object the contact roles are on, such as accounts or opportunities




## Add and Manage Contact Roles in Salesforce Classic

To specify the part that each contact plays in your business process, add contact roles to accounts, cases, contracts, and opportunities.

 **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.

1. Click **New** in the Contact Roles related list of an account, case, contract, or opportunity.
2. Use the lookup icon to select a contact or person account. Optionally, click **New** to create a contact.
3. Select a role for the contact.
4. Optionally, designate a primary contact for the record. Cases don't have this option.
5. Save your changes.
6. Keep the record's contact roles up to date by editing and deleting them as needed.

 **Example:** At AW Computing, Mary Smith evaluates all proposals and then forwards them to Tom Jones for a final decision. In the opportunity record for AW Computing, you designate Mary Smith as the Evaluator and Tom Jones as the Decision Maker. Now you know who to contact first!

SEE ALSO:

[Considerations for Using Contact Roles](#)

[Contact Role Fields](#)

## Contacts to Multiple Accounts

People often work with more than one company. A business owner might own more than one company or a consultant might work on behalf of multiple organizations. Relate a single contact to multiple accounts so you can easily track the relationships between people and businesses without creating duplicate records.

When you use Contacts to Multiple Accounts, each contact still requires a primary account (the account in the `Account Name` field). The contact and its primary account have a *direct* relationship. But you can add other accounts to the contact. These secondary account-contact relationships are *indirect*.

Contacts to Multiple Accounts works with person accounts. That means a person account can be either a related contact on a business account or a related account on a contact. A person account can also be related to another person account as either a related contact or related account. When you relate a person account to an account or contact, the relationship is always indirect. That's because person accounts don't have primary accounts, so person accounts can't be directly related to business accounts. And person accounts can't be primary accounts for contacts, so person accounts can't be directly related to contacts.

### EDITIONS

Available in: Salesforce Classic

Available in all editions

### USER PERMISSIONS

To add or edit contact roles:

- Edit on the object the contact roles are on, such as accounts, cases, contracts, or opportunities

AND

Read on contacts

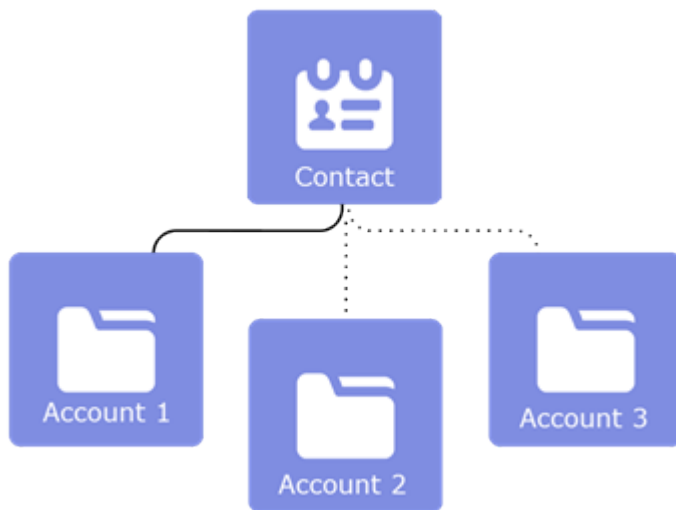
To view contact roles:


- Read on the object the contact roles are on, such as accounts, cases, contracts, or opportunities

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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



 **Example:** John Smith is president of Acme Corporations, and Acme is the account on his contact record. But John is also involved with the nonprofit media organization Greendot Media. By adding Greendot Media as a related account on John's contact record, you can track this other relationship. John is considered a *direct* contact to Acme because Acme is the account on his contact record. And he's considered an *indirect* contact to Greendot Media and any other accounts that he becomes related to. John also appears on the Related Contacts related list for Greendot Media and any other accounts that he's indirectly related to.

SEE ALSO:

[Create and Edit Relationships Between Contacts and Accounts](#)

[Considerations for Relating a Contact to Multiple Accounts](#)


## Create and Edit Relationships Between Contacts and Accounts

To easily track the relationships between people and the businesses they work with, relate a single contact record to multiple account records.

 [Watch a Demo](#) (2:12 minutes)

1. From an account record, use the Related Contacts related list to create or edit relationships between accounts and contacts or person accounts.
  - a. Create a relationship by clicking **Add Relationship**.
  - b. Edit an existing relationship by clicking **View Rel** (in Salesforce Classic) or **View Relationship** (in Lightning Experience). Then click **Edit Relationship**.

2. Fill in the account-contact relationship information.

 **Note:** The `Direct` field indicates whether the account associated with the contact is the contact's primary account. The field is read only because it's a system-generated field based on the `Account Name` field on the contact. To remove a direct relationship between a contact and an account, change the contact's primary account or delete the contact. Person accounts always have indirect relationships to business accounts.

3. Save your changes.

To create and edit account and contact relationships from a contact or person account record, use the Related Accounts related list.

SEE ALSO:

[Contacts to Multiple Accounts](#)

[Considerations for Relating a Contact to Multiple Accounts](#)

[Account Contact Relationship Fields](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To create, edit, or delete relationships between account and contacts

- Read on accounts and Edit on contacts

To view relationships between account and contacts

- Read on accounts and contacts

## Considerations for Relating a Contact to Multiple Accounts

Get familiar with potential gotchas before you relate a single contact to multiple accounts.

### General

- The account that's in the `Account Name` field on a contact record is the contact's *primary* account. The relationship between the contact and its primary account is a *direct* relationship. All other accounts that are related to the contact are *indirect* relationships.
- To remove a direct relationship between a contact and an account, change the contact's primary account or delete the contact.
- You can import account-contact relationships with the Data Loader, but not the Data Import Wizard.
- Community users with the Customer Community user license can't see indirect account-contact relationships.
- In Lightning Experience and Salesforce1, the **Add to Campaign** row-level action isn't available from the Related Contacts related list on account records. Click **View All** to see the full related list and access the Add to Campaign mass action.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

## Account Contact Relationships

- All direct contacts are automatically included in the account record's Related Contacts related list, so your admin may have removed the Contacts related list from your page layouts.
- When you have access to a particular account, the related contacts that you have Read access to appear in the Related Contacts related lists. When you have access to a particular contact, all related accounts appear in the Related Accounts related list, but you can open only the accounts you have Read access to.
- When creating indirect relationships between accounts and contacts, the contact must have a primary account—it can't be a private contact.
- You can't create a new contact from the Account Contact Relationship detail page.
- If changing a contact's primary account triggers a workflow rule that changes the primary account to something else, the relationship between the contact and the account you had selected is saved as an indirect relationship. This is true *only* if your admin has configured the settings to save previous relationships.
- Some lists of most recently used items (such as a contact lookup field) only show direct relationships.

## Merging

- If you try to merge contacts that are indirectly related to the same account, you'll get an error message telling you to remove the duplicate relationship. The same is true when merging accounts that are indirectly related to the same contact. The error message tells you which account–contact relationships are preventing the merge, regardless of whether you have access to the records. If you don't have access to a record, you can't navigate to it.
- When merging person accounts, indirect relationships with accounts and indirect relationships with contacts are evaluated separately. If you have conflicts with both, you'll get two errors and need to resolve them separately.

## Microsoft Integration

- When syncing contacts between Salesforce and Microsoft Outlook, only the primary account relationship is synced.
- If you remove the account name from a contact in Outlook, the contact will not sync to Salesforce successfully if the contact has relationships to other accounts in Salesforce.

## Admin Settings

- When you try to delete an account that has direct contacts that are related to other accounts, what happens depends on what your admin specified in the account settings. You're either blocked from deleting the account or allowed to delete the account. If you're allowed to delete the account, all direct contacts will be automatically deleted, regardless of whether they have relationships to other accounts.
- When you change a contact's primary account, what happens to the previous account relationship depends on what your admin specified in the account settings. The relationship between the contact and previous primary account will be deleted or saved as an indirect relationship.
- Whether activities roll up to a contact's parent account depends on what your admin specified in the activity settings.

### SEE ALSO:

[Contacts to Multiple Accounts](#)

[Create and Edit Relationships Between Contacts and Accounts](#)

## Account Contact Relationship Fields

Contacts to Multiple Accounts lets you associate a single contact to multiple accounts through the Account Contact Relationship object. Your page layout and field-level security settings determine which fields are visible and editable.

Field	Description
Account	The name of the company the contact is related to.
Active	Indicates whether the contact is actively involved with the company.
Contact	The name of the person that's related to the account.
Direct	Indicates whether the account associated with the contact is the contact's primary account. This read-only field is based on the <code>Account Name</code> field on the contact record. For example, on the Acme account record, the Related Contacts related list automatically includes all contacts that have Acme in the <code>Account Name</code> field and marks them as direct contacts.
End Date	The date a relationship between a contact and account ended. Use with the <code>Start Date</code> field to keep a history of the relationship.
Roles	The contact's participating role in the account; for example, Buyer, Decision Maker, or Evaluator. You can select multiple roles for a contact. Customize the roles in the picklist by editing the field.  This field is separate from the Role field on Account Contact Roles.
Start Date	The date a relationship between a contact and account began. Use with the <code>End Date</code> field to keep a history of the relationship.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### SEE ALSO:

[Contacts to Multiple Accounts](#)

[Create and Edit Relationships Between Contacts and Accounts](#)

## Considerations for Using Contact Hierarchy in Lightning Experience

Keep these considerations in mind when you create contact hierarchies.

### Display of Contacts

The Contact Hierarchy page displays up to 2,000 contacts in Lightning Experience. (To view contacts in a different part of the hierarchy, enter the hierarchy from a different contact.) The hierarchy doesn't display details of contacts you don't have permission to view.

### Person Accounts Not Supported

Person accounts aren't supported for the Reports To field or the View Contact Hierarchy action.

#### EDITIONS

Available in: Lightning Experience

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

#### USER PERMISSIONS

To view contacts:

- Read on contacts

## Considerations for Changing Accounts on Contacts That Are Enabled for Portals

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

- External users can access their own cases and opportunities from their previous accounts.
- Contacts on partner accounts can only be transferred to other partner accounts. You can't transfer partner contacts to an account that is enabled as a customer account.
- Contacts' portal roles are automatically updated to match the name of the account that they're transferred to (unless they're high-volume customer users, which don't have roles). For example, the portal role "Account A Customer User" becomes "Account B Customer User" (because a portal role's name includes the name of the account that it's associated with). Portal roles are unique to each account and are located under the account owner's role in your Salesforce org's role hierarchy.
- When you transfer portal users between accounts, the portal users' roles are updated, so when you transfer a partner user to another account:
  - Opportunities on each account are recalculated through your Salesforce org's forecast hierarchy.
  - Opportunities that the partner user owns remain in the previous account.
- Delegated partner user administrators and delegated customer user administrators can update portal users on accounts that they're transferred to.

#### EDITIONS

Available in: Salesforce Classic

Available in all editions

SEE ALSO:

[Create and Manage Partner Portals](#)

## Import Contacts from Mobile Device Contact Lists into Salesforce

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

1. In Salesforce1, navigate to where you create contacts.
2. Tap **Import from Device** to open the device's contact list.
3. Select a contact.

#### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

4. To associate the contact with an account in Salesforce, go to the contact record in Salesforce and add an account.

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

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



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

SEE ALSO:

[Considerations for Importing Contacts from a Mobile Device](#)

## Considerations for Importing Contacts from a Mobile Device

When importing contacts into Salesforce from a mobile device's contact lists, there are a few things to be aware of.

- To use the Import from Device button, you need the Allow Salesforce1 to import Contacts from mobile device Contact lists permission.
- When importing contacts from an Android or iOS device using Salesforce1 into a Salesforce org that has State and Country picklist fields enabled, the `State` field isn't populated.
- If you have multiple mobile phone fields in your mobile device's contact, and the `Phone` field in Salesforce is empty:
  - The first mobile phone field maps to the `Phone` field in Salesforce.
  - The second mobile phone field maps to the `Mobile` field in Salesforce.
- When you select emails from the mobile device, Salesforce1 typically pulls the second email address location. If labels are created on the device, the integration tries to map from the local work email address to the standard contact email address in Salesforce.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

## Get High-Quality Data When You Need It Right in Salesforce

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

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

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

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



**Note:** For orgs with Performance Edition, users automatically get Data.com Prospector and Data.com Clean.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

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

### IN THIS SECTION:

#### [Data.com Prospector](#)

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

#### [Data.com Clean](#)

Data.com Clean keeps your org up to date using data from Dun & Bradstreet and Data.com. Using Clean jobs, you can clean your records on a regular basis. You can also clean a single record or a list of records.

#### [Data Integration](#)

Data Integration keeps your org up-to-date, using data from Dun and Bradstreet, Data.com, or third-party data packages. When you activate a data integration rule, Data Integration does a bulk update of your records using data from the rule's data service. After the data integration rule is active, records are updated as needed after you add or modify them.

### SEE ALSO:

[Data Integration](#)

[Data.com Clean](#)

[Prospect for Companies, Contacts, and Leads Right in Salesforce](#)



## Data.com Prospector

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

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

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

There are two versions of Data.com Prospector: Corporate Prospector and Premium Prospector. Premium Prospector includes more Dun & Bradstreet fields for adding to or manually cleaning account, contact, or lead records. Premium Prospector users also have access to the Company Hierarchy page. The Salesforce Help refers to Data.com Premium Prospector unless otherwise noted. For more information on Premium Prospector, contact your Salesforce account manager.

EDITIONS

Available in: Salesforce Classic

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

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

## Data.com Prospector Classic and Lightning Experience

### Prospecting in Lightning Experience

Manage Access to Data.com Search Results and Related Features

[Prospecting Insights in Lightning](#)

### Prospecting in Salesforce Classic

[Get Critical Industry, Financial, and Competitive Insights for Your Accounts](#)

[Prospecting Insights Data Details](#)

## IN THIS SECTION:

[Prospect for Companies, Contacts, and Leads Right in Salesforce](#)

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

[Prospecting Insights in Lightning](#)

Data.com Prospecting Insights combines Dun & Bradstreet company details and industry intelligence in a snapshot. Tabs with company information, account hierarchies, and links to related industries help you start smart conversations with your prospects and customers.

## Prospect for Companies, Contacts, and Leads Right in Salesforce

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

## EDITIONS

Available in: Salesforce Classic

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

## IN THIS SECTION:

[Considerations for Prospecting for Companies, Contacts, and Leads in Salesforce](#)

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

[Prospect for Companies Fast Right In Salesforce](#)

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

[Get More Accounts in Salesforce Lightning](#)

Data.com Prospector customers find the accounts that they need from the Accounts page and add them to their org in just a few clicks.

[Prospect for Leads Fast Right In Salesforce](#)

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

[Prospect for Contacts Fast Right In Salesforce](#)

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

[Prospect for Key Contacts at Your Accounts](#)

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

[Considerations for Prospecting for Data.com Contacts in Salesforce](#)

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

[Prospect for Companies in the Same Corporate Hierarchy](#)

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

### [Guidelines for Prospecting for Companies, Contacts, and Leads in Salesforce](#)

Check out some guidelines to follow when prospecting for new companies and contacts with Data.com Prospector.

## Considerations for Prospecting for Companies, Contacts, and Leads in Salesforce

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

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

### EDITIONS

Available in: Salesforce Classic


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

### SEE ALSO:

[Guidelines for Prospecting for Companies, Contacts, and Leads in Salesforce](#)

## Prospect for Companies Fast Right In Salesforce

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

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

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To add accounts from Data.com:

- Create on accounts

6. If you don't see what you're looking for, use filters to narrow your results. Expand filter categories as needed. Enter a range or select the checkbox next to each filter you want to apply.
7. Add all accounts or a selection to Salesforce.
  - To add all accounts, click **Add to Salesforce** and select *All*.
  - To add selected accounts, select the ones you want, then click **Add to Salesforce** and choose *Selected*.
8. Click **Continue**.  
If your selection includes duplicates, we'll add them if duplicate account records are allowed in your Salesforce organization. Adding more than 200 records can take a few minutes. If you add that many, we'll send you an email when the process is complete.
9. From the confirmation message, click **Go to Accounts** to view the list of new records on the Accounts home page.  
If you use Data.com Prospector, when you add an account from Data.com, a corresponding D&B Company record (if one exists in Data.com) is automatically created in Salesforce and linked to the account record via its **D&B Company** field.

## SEE ALSO:

[Guidelines for Prospecting for Companies, Contacts, and Leads in Salesforce](#)  
[Understand Data.com Searches](#)

## Get More Accounts in Salesforce Lightning

Data.com Prospector customers find the accounts that they need from the Accounts page and add them to their org in just a few clicks.

 [Watch a Demo](#) (1:10 minutes)

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

Use a combination of available filters to find the accounts you want.

### Annual Revenue

Select a logical operator and enter an annual revenue value. You can add multiple Annual Revenue filters with these logical operators.

### Company or Website

Enter a full or partial company name or website.

### State

Select from a list of states or unincorporated and organized territories.

 **Note:** States are valid only when filtering with the United States as the country.

### Country

Select from a list of countries.

### Location Type

Select from a list of available location types.


- Branch: A secondary location to a headquarters location.
- Headquarters: A company that has branches or subsidiaries that report to it.
- Single Location: A company with no branches or subsidiaries.

### EDITIONS

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

## Prospect for Leads Fast Right In Salesforce

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

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

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

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To add Data.com contacts as leads:


- Create on leads

### SEE ALSO:

[Prospect for Key Contacts at Your Accounts](#)

## Prospect for Contacts Fast Right In Salesforce

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

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

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

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

### SEE ALSO:

[Guidelines for Prospecting for Companies, Contacts, and Leads in Salesforce](#)  
[Understand Data.com Searches](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To search Data.com for contacts:

- No permissions required

To add Data.com contacts:

- Create on contacts

To create an account when adding contacts:

- Create on accounts

## Prospect for Key Contacts at Your Accounts

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

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

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

The Data.com tab opens and displays a list of contacts that match the account name and any filters you selected. For example, if you want to get manager contacts at Universal Telco, go to Universal Telco's account detail page. Click **Get Contacts** and under **By Level**, select the *Manager-Level* filter. The Data.com tab opens with a list of managers at Universal Telco.

3. Select more filters if you need a more targeted list. Expand filter categories as needed. Enter a range or select the checkbox next to each filter you want to apply.
4. Add all contacts or a selection to Salesforce.
  - To add all contacts, click **Add to Salesforce**.
  - To add selected contacts, first select the ones you want, then click **Add to Salesforce** and choose *Selected*.
5. Select **Contacts** to add the records as contacts associated with the account you started from. They'll be associated with the account you started from.
6. Click **Continue** to add the records.
 

If your selection includes duplicates, we'll add them if duplicate contact records are allowed in your Salesforce organization. Adding more than 200 records can take a few minutes. If you add that many, we'll send you an email when the process is complete.
7. Click **Go to Account** to return to the account record.

### SEE ALSO:

[Prospect for Contacts Fast Right In Salesforce](#)

[Prospect for Leads Fast Right In Salesforce](#)

## Considerations for Prospecting for Data.com Contacts in Salesforce

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

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

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To get Data.com contacts from an account:

- Read on accounts
- AND
- Create on contacts

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

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

Limitation	Description
Maximum 200 contacts	You can add up to 200 contacts in a single request. When you select more than 200 contacts, you are asked to deselect some of the contacts.
Filters	<ul style="list-style-type: none"> <li>Filters are connected by a logical AND operator.</li> <li>Add just one of each filter. Adding more than one of each filter can cause unpredictable results.</li> <li>Department—Select 1 or more departments from the scrollable list.</li> <li>Level—Select 1 or more levels from the scrollable list.</li> <li>Title—Enter a single title or a comma-separated list of titles.</li> </ul>
Account must be clean	Get More Contacts works on clean accounts only. Clean accounts have been imported from Data.com, or your organization has cleaned the account after the record was added to your organization. If the selected account is not clean, talk with your administrator about how to clean the account.

## IN THIS SECTION:

[Filter Contacts from Get More Contacts List View](#)

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

## Filter Contacts from Get More Contacts List View

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



You need a Data.com Prospector license.

 [Watch a Demo](#) (1:19 minutes)



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

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

There are some new icons to identify contacts when you use filters to refine your search results.

Icon	Description
	The contact is already in CRM.
	Your organization owns the contact.



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

## Prospect for Companies in the Same Corporate Hierarchy

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

Data.com Company Hierarchy uses Dun & Bradstreet data to display a view of an account’s hierarchical relationship with related companies. To add an account in your Salesforce org, click the **Add Account** button next to the account.

Company Hierarchy is available as part of Data.com Prospector. In addition to showing the relationships between corporate entities, the hierarchy shows the associated annual revenue and number of employees for entities within the hierarchy. For context, the hierarchy also includes information from your Salesforce org such as whether an entity exists as an account record, and the account owner. Using this information, sales reps can identify relevant prospective customers, and then easily add them as accounts directly from the hierarchy view.

The Data.com Company Hierarchy shows different company types and how they’re related.

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

### IN THIS SECTION:

[View the Company Hierarchy for Accounts](#)

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

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

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

### Guidelines for Adding Accounts in the Same Company Hierarchy to Salesforce

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

#### View the Company Hierarchy for Accounts

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

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

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

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

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

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



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

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

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To add accounts from Data.com

- Create on accounts

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


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

SEE ALSO:

[Prospect for Companies Fast Right In Salesforce](#)

### Guidelines for Adding Accounts in the Same Company Hierarchy to Salesforce

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

- A green dot (●) appears in the search results next to records already in Salesforce. These records can't be added again unless they have first been deleted from Salesforce, or your organization allows duplicates.
-  **Tip:** If a record is already in Salesforce, hover over the green dot and click the link to go directly to the record.
- You can add only one record at a time from Company Hierarchy.
  - Records are considered duplicates when they have the same Data.com ID number in the `Data.com Key` field. When a duplicate record is added, it isn't counted against your record addition balance.
  - If you can't add a record to Salesforce because of errors, we'll notify you and provide the error details in a .csv file.


#### 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

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

Check out some guidelines to follow when prospecting for new companies and contacts with Data.com Prospector.

- 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't be added again unless they have first been deleted from Salesforce, or your organization allows duplicates.
-  **Tip:** If a record is already in Salesforce, hover over the green dot and click the link to go directly to the record.
- A blue checkmark (✓) appears in search results next to records you've already purchased (added or exported) from Data.com. When you add Data.com contacts or accounts, each one counts against your record addition balance. If you add records you've already exported from Data.com, the added records don't count against your record addition balance.
  - Regardless of your record addition limit or your record addition balance, you can't manually select more than 1,000 records at a time.
  - Regardless of your record addition limit or your record addition balance, you can't add more than 100,000 records at a time.

#### 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

- Records are considered duplicates when they have the same Data.com ID number in the `Data.com Key` field. This includes records that were added from Data.com as both contacts and leads. When a duplicate record is added, it will *not* be counted against your record addition balance.
- If you can't add one or more records to Salesforce because of errors, we'll notify you and provide the error details in a .csv file.
- If your search produces a large number of results, you won't see any data past page 10. If this happens, you can refine your search to get the results you want. See [How can I see complete, relevant information for Data.com search results?](#)
- If you export Data.com contacts or accounts *instead of* adding them to Salesforce, each exported record counts against your record addition balance. If you export records you've already added to Salesforce or re-export records you previously exported, the exported records don't count against your record addition balance.
- If you export a group of Data.com contacts, you can still add those contacts back into Salesforce as contacts or leads without affecting your record addition balance.
- Regardless of your addition limit or the number of records you have left to add, you can't export more than 100,000 records at a time. Records will be exported in batches of 50,000. If two batches are needed, the records will be sent in a .zip file.
- If numeric values, such as phone numbers, are cut off in the .csv file, change the format of the field's column in the .csv file to *General* or *Text*, or open the file in a text editor such as WordPad.
- You can import a list of exported records back into Salesforce using Data Loader. Unless your Data.com preferences are set to allow duplicate records, the import process checks for duplicates using the Data.com ID number from the `Data.com Key` field. These records won't be imported from Data Loader.
  - Any record that has the same Data.com ID (from the `Data.com Key` field) as another record within the .csv file.
  - Any record that has the same Data.com ID (from the `Data.com Key` field) as a record already in Salesforce.

#### IN THIS SECTION:

##### [Narrow Your Prospecting Search Results to Target What You're Interested In](#)

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

##### [Using Data.com FAQ](#)

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

#### SEE ALSO:

##### [Prospect for Companies, Contacts, and Leads Right in Salesforce](#)

##### [Considerations for Prospecting for Companies, Contacts, and Leads in Salesforce](#)

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

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

#### IN THIS SECTION:

##### [Understand Data.com Searches](#)

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

#### 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

### Understand Data.com Search Modifiers

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

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

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

### Data.com Industry Selector

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

## Understand Data.com Searches

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

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

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

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

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

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

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

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

### 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

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

#### SEE ALSO:

[Understand Data.com Search Modifiers](#)

### Understand Data.com Search Modifiers

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

#### Company or Website

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

#### Title

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

#### Name or Email

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

#### Location | City

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

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To search Data.com for accounts:

- No permissions required

To search Data.com for contacts:

- No permissions required

## Location | Postal/ZIP Code

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

## Location | Area Code

- To search for multiple area codes, separate them with commas: `,`. For example, `312, 708` returns results for both 312 and 708, or either one, depending on Data.com data.
- To exclude an area code from your results, before the area code, type a minus sign: `-`. For example, `-708` returns a list of results that excludes 708.

## SEE ALSO:

[Understand Data.com Searches](#)

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

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

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



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

**Data.com Industry Selector**

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

Here's how it works.

**EDITIONS**

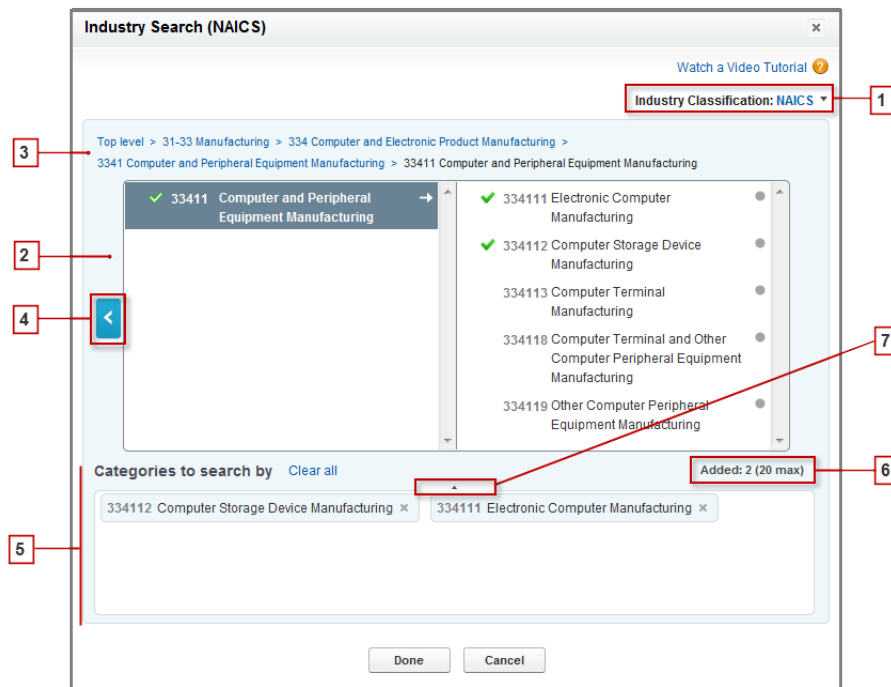
Available in: Salesforce Classic

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

**EDITIONS**

Available in: Salesforce Classic

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



1. Select the industry classification system your organization uses.

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

You can select a different industry classification system at any time, but doing so will clear your selections.

2. Use the selection panels to explore industries and their subindustries and add them to your search. If an industry has a numeric classification code, you'll see it here. When you hover over an industry name, you'll get two options.


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

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

To remove industries from the Categories box, hover over the industry name and click the ✕. If you remove any subindustries from the selection panel, the industry is removed from the Categories box, and its remaining subindustries appear instead. (This



partial selection is denoted by an outlined green checkmark  next to the industry name.) Keep in mind that if you select some but not all subindustries within an industry, the number of selections in the Categories box increases.

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

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

#### SEE ALSO:

[Understand Data.com Searches](#)

#### Using Data.com FAQ

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

#### IN THIS SECTION:

[How can I see complete, relevant information for Data.com search results?](#)

[Which Data.com user type am I?](#)

[How can I improve my Data.com search results?](#)

[Why do I see companies I didn't search for in my Data.com search results?](#)

[What's the limit of Data.com records I can add to Salesforce?](#)

[When I add CRM records from Data.com, how do I know which field values have Data.com data?](#)

[What does the Account Site field value on an Account record mean?](#)

[Why does the Ownership field have a value of Private for companies I know are public?](#)

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

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

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

#### 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

- When I use the Employees or Revenue filter to refine my account or contact search results, I get far fewer results than I expect. Why?
- Why do some account and D&B Company records have identical D-U-N-S Numbers?
- What is the difference between the Account Site and Location Type fields?
- Why did I receive a message that says, You have limited access to data, so you can't completely clean this record?
- Why did I receive a message that says, You can't clean this record because you have limited data access, as set by your administrator?

SEE ALSO:

[Understand Data.com Searches](#)

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

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

To see complete, relevant account information in search results:

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

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

### Which Data.com user type am I?


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

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

SEE ALSO:

[Using Data.com FAQ](#)

### How can I improve my Data.com search results?

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

SEE ALSO:

[Understand Data.com Searches](#)

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

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

the `Company` or `Website` field, the results will also include Oracle Corporation because Oracle is the parent company of Sun Microsystems.

SEE ALSO:

[Understand Data.com Searches](#)

[Using Data.com FAQ](#)

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

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

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

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

SEE ALSO:

[Using Data.com FAQ](#)

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

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

- [Account Fields](#)
- [Contact Fields](#)
- [Lead Fields](#)

SEE ALSO:

[Using Data.com FAQ](#)

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

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

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

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

SEE ALSO:

[What is the difference between the Account Site and Location Type fields?](#)

[Using Data.com FAQ](#)

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

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

SEE ALSO:

[What does the `Account Site` field value on an `Account` record mean?](#)

[Using Data.com FAQ](#)

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

There are a number of possible reasons.

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

SEE ALSO:

[Using Data.com FAQ](#)

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

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

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

SEE ALSO:

[Using Data.com FAQ](#)

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

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

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

SEE ALSO:

[Using Data.com FAQ](#)

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

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

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

SEE ALSO:

[What does the Account Site field value on an Account record mean?](#)

[Using Data.com FAQ](#)

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

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

SEE ALSO:

[Using Data.com FAQ](#)

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

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

SEE ALSO:

[Using Data.com FAQ](#)

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

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

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

- For Contact Manager 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.

SEE ALSO:

[Which Fields Are Affected by Data Integration Rules and Data.com Clean?](#)

[Using Data.com FAQ](#)

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

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

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

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

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

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

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

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

SEE ALSO:

[Prospecting Insights Data Details](#)

**Prospecting Insights Data Details**

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

Prospecting Insights is available with Data.com Prospector licenses.

Insights Category	Details
Business Details	<ul style="list-style-type: none"><li>Description of the company supplied by the Hoover's, Inc. subsidiary of Dun and Bradstreet</li><li>Company address, phone, and website</li><li>Location type—headquarters or a branch office</li><li>Location size in square feet, identified as the actual measurement or estimated</li></ul>

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS


To get Data.com prospecting insights for an account:

- Read on accounts

EDITIONS

Available in: Salesforce Classic

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

Insights Category	Details
	<ul style="list-style-type: none"> <li>• Location ownership—owned or rented</li> <li>• Tradestyle, if the company uses one</li> <li>• Year the company was founded</li> </ul>
Financial Details	<ul style="list-style-type: none"> <li>• Fiscal year end, identified by month</li> <li>• Stock market exchange and symbol</li> <li>• Standard &amp; Poor's 500 index indicator</li> <li>• Fortune 1000 rank</li> <li>• Delinquency risk—the likelihood of this company paying 90 or more days late over the next 12 months*</li> </ul> <p> <b>Important:</b> Use this information for marketing pre-screening purposes only.</p> <ul style="list-style-type: none"> <li>• Annual revenue for the most recent and prior year, and growth percentage</li> <li>• Net income for the most recent year*</li> <li>• Employee number for the most recent and prior year, and growth percentage</li> </ul>
Contacts from Data.com	<ul style="list-style-type: none"> <li>• Graphical view of contact distribution at the company</li> <li>• Links to contacts at the company, by department—clicking a link takes you to the Data.com Find Contacts page</li> </ul>
Top Competitors	<ul style="list-style-type: none"> <li>• Links to websites for the company's top competitors</li> <li>• Primary competitors listed by revenue</li> </ul>
Industry Details	<ul style="list-style-type: none"> <li>• Primary NAICS and SIC classifications</li> <li>• Industry selector for industries related to the primary NAICS and SIC classifications</li> <li>• Sample call-prep questions</li> <li>• Competitive landscape analysis*—an overview of the industry's competitive environment</li> <li>• Industry trends* and industry opportunities*—how events and issues are affecting industry businesses</li> <li>• Links to selected industry websites</li> </ul>

\* Available only with a Premium license

## Prospecting Insights in Lightning

Data.com Prospecting Insights combines Dun & Bradstreet company details and industry intelligence in a snapshot. Tabs with company information, account hierarchies, and links to related industries help you start smart conversations with your prospects and customers.

Prospecting Insights is available with a Data.com Prospector license.



**Important:** If you use Professional Edition, add the Data.com Key field to the Accounts page layout.

### EDITIONS

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

## Company

View a company overview, financial details, a list of top competitors, and a breakdown of account contacts. View and add contacts by level or department. Read details about key competitors. Understand company linkages.

## Hierarchy

Get a complete hierarchical view of a company and its linkages. Click the plus (+) sign next to a company to add it as an account.

## Industry

Critical industry insights help you intelligently engage with an account.

### Industry Details

View details about the accounts industry as identified by Standard Industrial Classification (SIC) and North American Industry Classification System (NAICS) codes and descriptions.

### Competitive Landscape

Understand the potential of the account in its related industry.

### Trends

Understand the account's financial situation and identify potential growth areas.

### Opportunities

Review various account opportunities.

### Call Prep

Prepare for a call with detailed Q&A.


### Industry Websites

See the websites of the account's top competitors.



## Data.com Clean

Data.com Clean keeps your org up to date using data from Dun & Bradstreet and Data.com. Using Clean jobs, you can clean your records on a regular basis. You can also clean a single record or a list of records.

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

Data.com Clean compares your account, contact, and lead records with records from Data.com and creates a link between your records and matching Data.com records. Clean also provides [clean status information for accounts, contacts, and leads](#) on page 118.

In Salesforce Classic, your users can do the following.

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

As a Salesforce admin, you can also do the following.

- Configure and run automated Clean jobs to flag field value differences on Salesforce records, fill blank fields, and overwrite field values. Configuring and scheduling Clean jobs is only available in Salesforce Classic.
- Use the [Data.com Match API](#) to create a custom solution for specific business purposes like updating leads as they are created and updating custom objects.

There are two versions of Data.com Clean: Corporate Clean and Premium Clean. Premium Clean includes more Dun & Bradstreet fields for adding to or manually cleaning account, contact, or lead records. The Salesforce Help refers to Data.com Premium Clean unless otherwise noted. For more information on Premium Clean, contact your Salesforce account manager.

Data.com Clean Version	Dun & Bradstreet (D&B) Fields
Data.com Corporate Clean	Basic set of Dun & Bradstreet fields.
Data.com Premium Clean	Basic set of Dun & Bradstreet fields, plus the <code>D&amp;B Company</code> field. This field links to an associated <code>D&amp;B Company</code> record with over 70 additional Dun & Bradstreet fields that are accessible on the <code>D&amp;B Companies</code> tab.

Data.com Clean doesn't support person accounts.

 **Note:** Data.com Clean must be purchased 1:1 for Sales Cloud and Service Cloud seats.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## IN THIS SECTION:

[Keep Your Salesforce Records Complete and Up To Date](#)

Your business is only as good as its data. Spend less time updating data and more time growing your business using Data.com. Access valuable company information from Dun & Bradstreet as well as crowd-sourced data from Data.com to keep your org up to date.

## SEE ALSO:

[Data Integration](#)[Using Data.com FAQ](#)[Clean Individual Account Records in Salesforce Classic](#)[Clean a List of Records](#)

## Keep Your Salesforce Records Complete and Up To Date

Your business is only as good as its data. Spend less time updating data and more time growing your business using Data.com. Access valuable company information from Dun & Bradstreet as well as crowd-sourced data from Data.com to keep your org up to date.

## EDITIONS

Available in: Salesforce Classic

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

## IN THIS SECTION:

[Clean Individual Account Records in Salesforce Classic](#)

Use Data.com Clean to manually clean an account record. With a manual clean, you do a side-by-side comparison of a single account record with its matched Data.com record, followed by a field-by-field update.

[Clean a List of Records](#)

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

[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 Does the Clean Status Tell Me About a Record?](#)

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

[How 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.

[Data.com Update Statuses](#)

For Data.com Prospector, Data.com Clean, and Data Integration, an update status field on your accounts, contacts, and leads indicates your record's status compared with Data.com data.

[Updating Records with Data.com Clean](#)

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

## Clean Individual Account Records in Salesforce Classic

Use Data.com Clean to manually clean an account record. With a manual clean, you do a side-by-side comparison of a single account record with its matched Data.com record, followed by a field-by-field update.

Available in: Salesforce Classic


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

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

### USER PERMISSIONS


To clean account records:

- Edit on accounts


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

Manual Clean is available in orgs with a Data.com Clean license and to any Salesforce user in an org with a Data.com Prospector license. You can manually clean all the account records you have access to in Salesforce—not just the records you previously added from Data.com.

Data.com Clean offers several ways to clean account records. Users can clean individual records manually or clean groups of records from a list view. You can also clean batches of records in your org using automated Clean jobs.


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

1. Open the record and check the Clean Status field. Even if its status is In Sync, you can manually clean the record. If you use Dun & Bradstreets' DUNSRight matching service, you can match some records to a different one from Data.com.

 **Tip:** From the **Clean Status** field, you can get more status information (such as which fields have different data in Data.com) and then clean the record. Click the status icon (🚩) and the popup guides you.

2. Click **Clean** to open the comparison page and compare the Salesforce record with the Data.com record.
3. Compare the records. A check mark appears next to any Data.com field value that matches the corresponding value in your Salesforce record.
4. Select the checkbox next to any Data.com value you want to accept.
5. If you use DUNSRight Matching and want to look for a different match from Data.com, click **Wrong Match?**
6. When you're satisfied that the record is accurate, click **Save**, even if you don't accept any data from Data.com.

The **Clean Status** field reflects the record's status, and its time stamp is updated to reflect your activity.

 **Note:** On an account, if you update the Company D-U-N-S Number field value while cleaning manually, delete the D&B Company field value. Otherwise, Clean can't add updated values for those two fields or link the correct D&B Company record to the account.

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

Suppose that you use Data.com Clean or Data.com Prospector and you've manually cleaned an account or lead record that isn't linked to a D&B Company record. When you click **Save**, Salesforce creates a D&B Company record (if available) and links it to the account or lead record. The next time you open the comparison page, the linked record is identified by its D-U-N-S Number in the `D&B Company Record Linked` field.

## SEE ALSO:

[Data.com Update Statuses](#)

[Which Fields Are Affected by Data Integration Rules and Data.com Clean?](#)

## Clean a List of Records

## USER PERMISSIONS

To clean account records:	Edit on accounts
To clean contact records:	Edit on contacts
To clean lead records:	Edit on leads
To create custom list views:	Read on the type of record included in the list
To create, edit, or delete public list views:	Manage Public List Views


## EDITIONS

Available in: Salesforce Classic

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


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

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

 **Note:** You can clean a list of account records only if you use Data.com as your matching service.

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

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

 **Note:** If you're cleaning records from a standard list view, make sure that your Salesforce admin adds the `Clean Status` field to the view. If you're cleaning records from a custom list view you've created, add the `Clean Status` field yourself.

1. Click the tab (Accounts, Contacts, or Leads) for the object whose records you want to clean from your list.
2. Select a view from the dropdown that contains the `Clean Status` field and click **Edit**.
3. From the list, select the records you want to clean, and click **Clean**.
4. Select one of these Clean options.
  - `Update Clean Status` updates each record's `Clean Status` field.
  - `Update Clean Status and Fill Blank Fields` updates each record's `Clean Status` field and fill blank fields with Data.com data.

5. Click **Update**.  
You see a confirmation message telling you how many records were matched and updated, and whether any errors occurred.
6. Review the changes to your records.  
If you selected the option to update only the `Clean Status` field and now find records with a clean status of `Different`, you can manually clean each record from its detail page.


SEE ALSO:

[Data.com Update Statuses](#)

[Which Fields Are Affected by Data Integration Rules and Data.com Clean?](#)

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

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

## 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.

SEE ALSO:

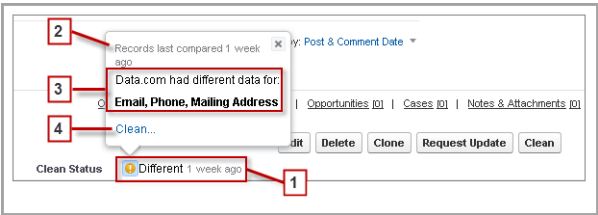
- [Why did I receive a message that says, You have limited access to data, so you can't completely clean this record?](#)
- [Clean Individual Account Records in Salesforce Classic](#)

What Does the `clean` status Tell Me About a Record?

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

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

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



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

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

- Accepted some values from Data.com and kept some Salesforce values.
- Clicked **Cancel** on the comparison page.

Click the icon to view the popup, which provides additional information and Clean options.

2. This line tells you about the Salesforce record's most recent comparison activity.


In this case, a user compared the Salesforce account record with Data.com's version one week ago.


3. This section provides more details about the comparison. In this case, Data.com had *different* Email, Phone, and Mailing Address values for the contact.
4. You can click the **Clean...** link to compare the Salesforce and Data.com records yourself.

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

## 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:

### 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



- 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

## Data.com Update Statuses

For Data.com Prospector, Data.com Clean, and Data Integration, an update status field on your accounts, contacts, and leads indicates your record's status compared with Data.com data.

When you're using Data.com Clean, the status field is called Clean Status. When you are using Data Integration, the status field is called Data Integration Status.






Status	Definition	API Value	Notes
 Not Compared	<p>The current version of the Salesforce record has not been compared with Data.com. This status may occur because:</p> <ul style="list-style-type: none"> <li>The record was <i>created manually</i> in Salesforce (not <i>added from Data.com</i>) and has not yet been compared with Data.com.</li> <li>The Salesforce record was previously compared with Data.com but later edited by a user and not compared again.</li> <li>The Salesforce record was previously compared with Data.com but later updated by a workflow or other automated process (such as lead conversion) and not compared with Data.com again.</li> <li>You map Data.com fields to Salesforce fields and one or more newly mapped Data.com fields has no value.</li> </ul>	Pending	<p>Records you add from Data.com are always <b>In Sync</b> until the data changes in one or both of the records.</p> <p>After you clean the record and a match is found in Data.com, the record's <b>Clean Status</b> changes to <b>Reviewed</b> until one of these conditions is met.</p> <ul style="list-style-type: none"> <li>The two records are identical (<b>In Sync</b> status).</li> <li>The record is updated in Salesforce or Data.com (<b>Different</b> status).</li> <li>The record becomes inactive in Data.com (<b>Inactive</b> status).</li> </ul>
 In Sync	When your Salesforce record was last compared with the Data.com record, the two were identical. Records with <b>In Sync</b> status are considered to be clean.	Matched	<p>Records in <b>In Sync</b> status are considered to be clean, but you can repeat the clean process.</p> <p>Click the icon in the <b>Clean Status</b> field and check the time stamp to see when the record was last compared.</p>



### 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

Status	Definition	API Value	Notes
 Reviewed	<p>When your Salesforce record was last compared with the Data.com record, the user who compared them:</p> <ul style="list-style-type: none"> <li>Kept one or more values from the Salesforce record.</li> <li>May have also flagged a field value as <i>wrong</i> to Data.com.</li> <li>Marked a record as <i>Inactive</i>.</li> </ul> <p>or</p> <ul style="list-style-type: none"> <li>Your Clean jobs are set to overwrite values for one or more fields, and one or more values were overwritten during the most recent job.</li> </ul>	Acknowledged	<p>Records in Reviewed status are considered to be clean, but you can repeat the clean process.</p> <p>After you clean the record and a match is found in Data.com, the record's Clean Status remains in Reviewed status until one of these conditions is met.</p> <ul style="list-style-type: none"> <li>The two records are identical (In Sync status).</li> <li>The record is updated in Salesforce or Data.com (Different status).</li> <li>The record becomes inactive in Data.com (Inactive status).</li> <li>Any fields previously flagged as <i>wrong</i> to Data.com have been reflagged as <i>right</i>.</li> </ul>
 Different	<p>The Salesforce record has different data from the corresponding Data.com record.</p> <p> <b>Note:</b> It's important to remember that a record's clean status can change from In Sync or Reviewed to Different when values change in the matched Data.com record. This may happen regularly as updated information from Data.com and D&amp;B is made available.</p>	Different	<p>After you clean the record and a match is found in Data.com, the record's Clean Status remains in Different status until one of these conditions is met.</p> <ul style="list-style-type: none"> <li>The two records are identical (In Sync status).</li> <li>A user reviews the two records and keeps one or more values from the Salesforce record (Reviewed status).</li> <li>The record becomes inactive in Data.com (Inactive status).</li> </ul>
 Select Match(not used in Data Integration)	Data.com does not have a record qualified for an <i>automatic</i> match but does have one or more potential matches. You can select one from up to five (5) match candidates.	SelectMatch	This status is available with the Data.com Clean product and D&B DUNSRight matching service only.
 Not Found	The Salesforce record has no similar records in Data.com record.	NotFound	The record can't be cleaned in Salesforce because Data.com

Status	Definition	API Value	Notes
 Inactive	The Data.com record corresponding to the Salesforce record has been reported as inactive by either Data.com or a user in your organization. A contact record may be inactive if it contains out-of-date or inaccurate information. An account record is inactive if D&B has marked it as out of business.	Inactive	could not find a record to match it with.  Inactive records are hidden from Data.com Prospector search results by default, but you can use filters to show them.  If clean the record and report it as Active to Data.com, the record's clean status changes to <i>Reviewed</i> .
 Skipped	<p>Either:</p> <ul style="list-style-type: none"> <li>The Salesforce record encountered an error related to a validation rule or trigger when it was last saved, causing the next incremental sync Clean job to set the record's status to <i>Skipped</i>.</li> </ul> <p>or</p> <ul style="list-style-type: none"> <li>The record's clean status was set to <i>Skipped</i> via the API.</li> </ul> <p><i>Incremental sync</i> Clean jobs do not process records with <i>Skipped</i> clean status.</p> <p><i>Full sync</i> Clean jobs process records with <i>any</i> clean status that encountered errors related to validation rules, triggers, or other customizations when last saved, but those records' <i>Clean Status</i> field values do not change until the errors are resolved.</p>	Skipped	<p>Work with your administrator to either:</p> <ul style="list-style-type: none"> <li>Modify the trigger, validation rule, or API customization that caused the error and the <i>Skipped</i> status, and then clean the record again manually or with Clean jobs.</li> </ul> <p>or</p> <ul style="list-style-type: none"> <li>Ask your administrator to consider selecting the <i>Skipped Records Clean Job Bypass</i> preference, which causes <i>both incremental and full sync jobs</i> to skip processing for records in <i>Skipped</i> clean status.</li> </ul>

## SEE ALSO:

[Clean Individual Account Records in Salesforce Classic](#)

[Clean a List of Records](#)

[What Does the Clean Status Tell Me About a Record?](#)

[Report an Account, Contact, or Lead as Inactive or Active to Data.com](#)

## Updating Records with Data.com Clean

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

### IN THIS SECTION:

#### [Report an Account, Contact, or Lead as Inactive or Active to Data.com](#)

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

#### [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.

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

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



**Note:** This feature is not supported with Data Integration.

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

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

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

### 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

### 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 clean account records:

- Edit on accounts

To clean contact records:

- Edit on contacts

To clean lead records:

- Edit on leads

contact is reported as *Inactive*, its clean status changes to *Inactive*. If the contact is later reported as *Active*, its clean status reverts to *Reviewed*.

SEE ALSO:  
[Data.com Update Statuses](#)

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](#).

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

Attribute	Data.com matching	DUNSRight™ matching
Default matching service		
Includes D&B’s Confidence Code		
Supports broad international matching <sup>1</sup>		
Supports non-English speaking countries		
Requires default mapping for <code>D-U-N-S Number</code>		

<sup>1</sup>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 Leste; Turkish Cyprus; United States Minor Outlying Islands; Wake Island; Wallis and Futuna; Western Sahara.

SEE ALSO:

[How Does Data.com Clean Match Your Records?](#)

## Data Integration

Data Integration keeps your org up-to-date, using data from Dun and Bradstreet, Data.com, or third-party data packages. When you activate a data integration rule, Data Integration does a bulk update of your records using data from the rule's data service. After the data integration rule is active, records are updated as needed after you add or modify them.



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

Data Integration updates your account, contact, and lead records with data from a data service. Available data services include Dun & Bradstreet, Data.com, and third-party data services. Updates are controlled by data integration rules. After you activate a rule, Data Integration automatically does updates whenever you add or edit a record. The rule's data service provides the data for this update. When you first activate a rule, Data Integration also does a bulk update of all your records from data in the rule's data service.

Data integration rules control how a data service matches its data to your records. Rules also control how the data service updates your records with data service data. You can activate and deactivate rules whenever you want.

Set options for Data Integration and rules in Setup. Options control whether Data Integration does bulk updates, how data integration rules affect triggers and workflow rules, and so forth.

### 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

### IN THIS SECTION:

[Use Data Integration to Update an Account in Salesforce Classic](#)

Use a data integration rule to manually update an account. The rule's data service updates the account based on the rule's update field mapping.

[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.

[How Do Data Integration Rules Match Your Records?](#)

When you clean your account, contact, and lead data with Data Integration, data integration rules compare your records to Data.com records. The comparison is based on the match field mapping settings for the rule.

[How Do Data Integration Rules Update Your Records?](#)

When you update your account, contact, or lead data with Data Integration, a data integration rule updates your records using data from in the rule's data service. The update is based on the update mapping for the rule.

[Data Integration Default Field Mappings](#)

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

### 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.

## Use Data Integration to Update an Account in Salesforce Classic

Use a data integration rule to manually update an account. The rule's data service updates the account based on the rule's update field mapping.



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

Data integration rules automatically update an account based on the rule's update field mapping. These updates usually occur when you add or change an account (*perpetual update*). Rule settings also let you update all accounts when you save the rule's settings or activate the rule (*bulk update*). Some data integration rules also featured *data refresh*, which regularly updates accounts.

You can also manually update an account using a data integration rule. Do a manual update when perpetual update is turned off, or when the data integration rule doesn't offer data refresh.

1. Open the account and go to the **Data Integration Rules** related list.
2. Choose the data integration rule you want to use to update the account, and click **Update**.  
You can update an account even if the rule status is **In Sync**.  
A dialog appears, showing you that your account was updated. Click **OK** to dismiss the dialog. The rule status is **In Sync**.

## 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.

### EDITIONS

Available in: Salesforce Classic

Available with a Data.com Clean license

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

### USER PERMISSIONS

To clean account records:

- Edit on accounts

### 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



## How Do Data Integration Rules Match Your Records?

When you clean your account, contact, and lead data with Data Integration, data integration rules compare your records to Data.com records. The comparison is based on the match field mapping settings for the rule.



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

For each active data integration rule, Data Integration compares and matches your records to Data.com records. The match is based on the rule's match field mapping. Each rule has its own default match mapping. In addition, based on your settings, Data.com updates your records when you first activate a rule or change its match mappings.

Data Integration matching has the following features and limitations.

### Accounts

- The Company Info for Accounts rule requires a Premium Clean license.
- Geocodes for Account rules don't require a Data.com Clean license.
- Only the Data.com matching service is available.
- All Dun & Bradstreet countries are supported.

### Contacts

The Geocodes for Contact Mailing Address rule doesn't require a Data.com Clean license.

### Leads

- The Company Info for Leads rule requires a Data.com Premium Clean license.
- The Geocodes for Lead Address rule doesn't require a Data.com Clean license.
- Leads are matched to Dun & Bradstreet companies (domestic or global ultimate).

Match mappings are partially customizable. The data service provides a fixed set of fields that it uses to match your records. You can't change the data service fields, but you can match them to fields you choose in your record, including custom fields.



**Example:** The match mapping for a rule is shown in the Edit Field Mappings page of a data integration rule. The first line is the name of the rule (1). The data service compares each field in the Data Service Fields list (2) to the corresponding field in the object fields list (3).

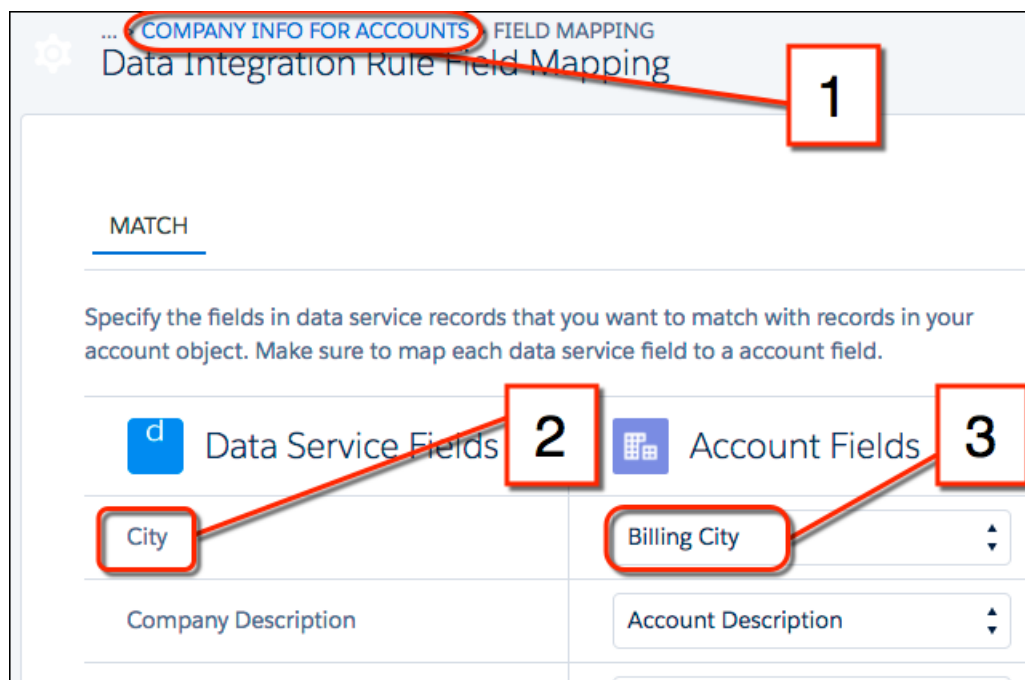
For example, this match mapping is for Company Info for accounts. It matches the contents of the Data.com data service field `City` (2) to the contents of the account field `Billing City` (3). You can also modify this mapping to match `City` to `Shipping City`.

### 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



SEE ALSO:

[Which Fields Are Affected by Data Integration Rules and Data.com Clean?](#)

## How Do Data Integration Rules Update Your Records?

When you update your account, contact, or lead data with Data Integration, a data integration rule updates your records using data from in the rule's data service. The update is based on the update mapping for the rule.

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

A data integration rule is part of a data service that supplies data to your org. The rule updates a specific Salesforce object type. Based on the rule, Data Integration updates your records from data in the data service. The update is based on the rule's update *field mapping*. Each rule comes with its own default update mapping.

Data Integration performs an update when you add or change a record (*perpetual update*). Rule settings also let you update all records when you save the rule's settings or activate the rule (*bulk update*). Some data integration rules also featured *data refresh*, which regularly updates accounts.

Data Integration updating has the following features and considerations:

### General considerations

- When a record is added or updated, Data Integration updates only blank fields.
- When data refresh is available, Data Integration determines if your record is out of sync with the data service. You can see the sync status in the record's detail page, and refresh the record if you choose.
- Data Integration updates your field only if the field types of the data service field and your record's field are compatible
- Data Integration updates your field only if the scale and precision of the data service field and your record's field are compatible.

### 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

### Accounts

- The Company Info for Accounts rule requires a Data.com Premium Clean license.
- Geocodes for Account rules don't require a Data.com Clean license.
- All Dun & Bradstreet countries are supported.

### Contacts

The Geocodes for Contact Mailing Address rule doesn't require a Data.com Clean license.

### Leads

- The Company Info for Leads rule requires a Data.com Premium Clean license.
- The Geocodes for Lead Address rule doesn't require a Data.com Clean license.

Update mappings are partially customizable. The rule contains all the fields that the data service provides, and you can't change those fields. You can match the data service fields to fields you choose in your record, including custom fields.



Example:

MATCH UPDATE 1

Specify the fields in the account object that you want to enrich with data from the data service.

Data Service Fields 2	Account Fields 3
City	Billing City

The update mapping for a rule appears when you edit the field mapping of a data integration rule.

The Update tab (1) displays data that's available from the data service. To copy data to your account, choose a target field in your account for each source field in the data service.

In this example, the data service provides data in the City field (2). During the update, the service copies the value of City to the Billing City field in the matched account.

- The data service update list has all the fields that the service provides for your object type. If the service has data for different object types, the update list can be different for each object.
- For the same object, the data service match list can be different from the data service update list.

SEE ALSO:

[Which Fields Are Affected by Data Integration Rules and Data.com Clean?](#)

### Data Integration Default Field Mappings

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

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

Data Integration is based on data integration rules, which come with default field mappings that you can customize. To view the default field mappings, in Setup, in the Quick Find box, enter *Data Integration Rules*. Click the rule you want to look at, and then click **Edit Field Mapping**. To see the fields that Data Integration uses to find matches with your records, click **Match**. To see the fields that Data.com copies to your records, click **Update**.

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

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

USER PERMISSIONS

To create or update custom report types:	Manage Custom Report Types
To delete custom report types:	Modify All Data
To run reports:	Run Reports
To schedule reports:	Schedule Reports
To create, edit, and delete reports:	Create and Customize Reports AND Report Builder

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

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".

## Cultivating High Net Worth Customers for Financial Services

### Salesforce for Wealth Management Overview

#### What Is Salesforce for Wealth Management?

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

#### Who Should Use Salesforce for Wealth Management?

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

#### How Do I Obtain Salesforce for Wealth Management?

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

## What Does Salesforce for Wealth Management Include?

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

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

SEE ALSO:

[Get Started With Salesforce for Wealth Management](#)

[Navigating the Salesforce for Wealth Management App](#)

## Get Started With Salesforce for Wealth Management

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

### Verify the Contents of the Salesforce for Wealth Management App

Verify that the Salesforce for Wealth Management custom app contains the correct tabs:

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. In the list, click *Salesforce for Wealth Management*.
3. Verify that the following tabs are present in the Included Tabs list:
  - Home
  - Accounts
  - Financial Accounts
  - Holdings
  - WM Assets
  - Client Interests
  - Know Your Clients
  - Reports
  - Dashboards
  - Documents
  - Console
4. If necessary, click **Edit** and choose the appropriate tabs to add or remove.

### USER PERMISSIONS

To view the setup options for custom apps:

- View Setup and Configuration

To manage custom apps:

- Customize Application

### Configure Users' App Choices

In addition to the main Salesforce for Wealth Management custom app, the following custom apps are also available in the Force.com app menu:

- Salesforce Financial Accounts & Holdings
- Salesforce Clients and Interests

- Salesforce Know Your Client

Optionally, you can hide these apps from users in the Force.com app menu, because all appropriate tabs are already consolidated in the main Salesforce for Wealth Management custom app. To hide these apps:

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Click **Edit** next to the appropriate app name.
3. In the *Assign to Profiles* area, deselect the checkboxes in the *Visible* column that correspond to end users' profiles. Select only the checkboxes that correspond to administrator profiles.
4. Click **Save**.
5. Repeat this procedure as necessary for the remaining custom apps listed above.

## Verify Record Types

From the object management settings for person accounts, go to Record Types to verify that the following record types are available for person accounts (clients).

### Individual

This record type is for clients and prospective clients. It should be assigned to the *Individual* page layout.

### Professional Relationship

This record type is for lawyers, accountants, and other professional relationships. It should be assigned to the *Professional Relationship* page layout.

## Configure Users' Page Layouts

Ensure that the following components are included in users' page layouts, which can be configured from the management settings for each object by going to Page Layouts.

### Home Tab Page Layouts

The home page layout for financial advisors, titled *FA Home Page*, should include the following components:

- Items To Approve
- Tasks
- Calendar
- Dashboard Snapshot
- Search
- Create New
- Recent Items
- Messages & Alerts
- Custom Links

### Person Accounts Page Layout

The page layouts for person accounts (clients) should include the following related lists:

- Financial Accounts
- Holdings
- Client Interests
- Know Your Client
- Open Activities

- Activity History
- Partners
- Account Team
- Notes & Attachments

## Verifying the Know Your Client Approval Process

Salesforce for Wealth Management includes an approval process that routes Know Your Client forms to the appropriate Salesforce users for approval.

SEE ALSO:

[Salesforce for Wealth Management Overview](#)

[Managing Wealth Management Clients](#)

## Managing the Know Your Client Approval Process

### About the Know Your Client Approval Process

An approval process automates how records are approved in Salesforce. An approval process specifies each step of approval, including who to request approval from and what to do at each point of the process.

The Know Your Client approval process is included in Salesforce for Wealth Management and has the following general definition:

1. A financial advisor creates a new Know Your Client record.



**Note:** Data from a saved Know Your Client record can be merged into a printable Microsoft Word document using the provided mail merge template.

2. A financial advisor submits the Know Your Client record for approval, which sets the following actions in motion:

- The Know Your Client record is locked and cannot be edited
- KYC Approval Status becomes "Pending Approval"
- Date Know Your Client Submitted becomes today
- Know Your Client record type becomes "KYC Submitted"
- An approval request is routed to the appropriate Salesforce user for review, and he or she is also sent an email notification using the appropriate email template

3. The lead financial advisor approves or rejects the approval request, which causes the following actions:

- The record continues to be locked and cannot be edited
- KYC Approval Status becomes "Approved" or "Rejected"
- Date KYC Approved/Rejected becomes today
- If the record was approved, a follow-up task is scheduled for the financial advisor to review the Know Your Client form in six months

### USER PERMISSIONS

To create, edit, delete, or clone approval processes:

- Customize Application

To view approval processes:

- View Setup and Configuration



## Activating the Know Your Client Approval Process

To activate the Know Your client approval process:

1. From Setup, enter *Approval Processes* in the Quick Find box, then select **Approval Processes**.
2. In the Manage Approval Processes For drop-down list, select "Know Your Client."
3. Click **Activate** next to the approval process name.

SEE ALSO:

[Salesforce for Wealth Management Overview](#)

[Managing Wealth Management Clients](#)

## Navigating the Salesforce for Wealth Management App

To access the Salesforce for Wealth Management app, go to the Force.com app menu in the top right corner of any Salesforce page and select Salesforce for Wealth Management. To get started on any task, just click the tab you want.

SEE ALSO:

[Salesforce for Wealth Management Overview](#)

[Managing Wealth Management Clients](#)

## Managing Wealth Management Clients

Clients are exclusively available in Salesforce for Wealth Management. A client is a person who you advise or do business with, a prospect who you potentially will do business with, or a professional relationship such as an accountant or lawyer. You can manage your clients on the Clients tab. In standard Salesforce terminology, clients are called "**accounts**." However, Salesforce for Wealth Management uses the term "clients."

Clients have all of the standard capabilities of account records.

In addition, the special capabilities of clients are as follows:

### Client Record Types

Record types are categories that allow you to organize your records. You can assign client records to the following record types:

- "Business" specifies a corporate entity or trust
- "Individual" specifies an existing or prospective client
- "Professional Relationship" specifies an accountant, lawyer, or other professional relationship

### Client List Views

On the Clients tab, you can use [list views](#) to conveniently access different sets of clients. For example, select "My A Clients" to view a list of your clients who have an "A" rating.

### Client Details

The client detail page includes groups of fields tailored to wealth management clients. For example, one section tracks a client's preferences in several categories — you can specify that a client is interested in vacation homes, mid-cap stocks, the retail and entertainment sectors, golf, and US politics.

### USER PERMISSIONS

To view the Clients tab:

- Read on accounts

To view clients:

- Read on accounts

To create clients:

- Create on accounts and contacts

**Financial Accounts Related List**

The Financial Accounts related list provides an overview of the client's financial accounts, such as account names, account numbers, and current values. This information comes from the records on the Financial Accounts tab.

**Holdings Related List**

The Holdings related list provides an overview of the client's owned assets such as funds, stocks, and bonds. For each holding you can see values such as market value, last price, purchase price, and number of shares. This information comes from the records on the Holdings tab. Note that each holding is associated with a financial account record.

**Client Interests Related List**

The Client Interests related list provides an overview of the securities that the client is interested in buying or selling. This information comes from the records on the Client Interests tab.

**Know Your Clients Related List**

The Know Your Clients related list provides an overview of the Know Your Client forms that are associated with the client. This information comes from the records on the Know Your Clients tab.

**Relationships Related List**

A relationship refers to a client who has a role in the life of another client, such as a spouse, child, accountant, or attorney. Relationships are tracked in the Relationships related list on the client detail page, which is available as an option. In standard Salesforce terminology, relationships are called “[partners](#).” However, Salesforce for Wealth Management uses the term “relationships.”

**Client Team Related List**

The Client Team related list tracks the financial advisors and other Salesforce users who are involved in the management of a particular client. In standard Salesforce terminology, client teams are called “[account teams](#).” However, Salesforce for Wealth Management uses the term “client teams.”

**Relationship Group Members Related List**

The Relationship Group Members related list displays the relationship groups of which the client is a member. It is available as an option and is called “Household Members” in some organizations.

**SEE ALSO:**

[Salesforce for Wealth Management Overview](#)

[Navigating the Salesforce for Wealth Management App](#)

## Salesforce for Wealth Management Reports and Dashboards

### Salesforce for Wealth Management Reports

Salesforce for Wealth Management offers industry-specific reports, which are grouped in the following folders on the Reports tab:

- Client Reports
- Client Interest Reports
- Financial Account Reports
- Holdings and WM Asset Reports
- Know Your Client Reports

To access these reports, select the appropriate folder from the drop-down list on the Reports tab, then click the appropriate report name.

**USER PERMISSIONS**

To run reports:

- Run Reports

AND

Read on the records included in reports

To view dashboards:


- Run Reports

AND

Access to view dashboard folders

## Salesforce for Wealth Management Dashboards

Salesforce for Wealth Management offers industry-specific dashboards, such as a dashboard of financial accounts that allows you to analyze your book of business. To access these dashboards, go to the Dashboards tab and select the appropriate dashboard name from the drop-down list.

 **Note:** You can see a dashboard snapshot on the Home tab.

SEE ALSO:

[Salesforce for Wealth Management Overview](#)

[Navigating the Salesforce for Wealth Management App](#)

## Establishing Relationship Groups of Your Customers

### Relationship Groups Overview


#### What Are Relationship Groups?

Relationship groups are custom object records used to store collections of [accounts](#). For example, you can use relationship groups to manage the following:

- A household of people who reside at the same address
- An extended family consisting of multiple generations of relatives
- A professional group such as a medical practice or a law firm
- The trustees and beneficiaries of a trust

The accounts that you add to relationship groups are called *relationship group members*. For more information, see [Relationship Group Members](#) on page 137.

#### Who Can Use Relationship Groups?

 **Note:** Relationship groups are only available upon request to [Salesforce for Wealth Management](#) customers. Note that the Relationship Groups tab may be named “Households” in Salesforce for Wealth Management organizations. To enable relationship groups, contact your Salesforce representative.

Your organization must have implemented [person accounts](#) before you can use relationship groups.

Your administrator can enable relationship groups by installing the Relationship Groups custom app.

#### What Are the Benefits of Relationship Groups?

Relationship groups allow you to:

- Track the familial and professional roles of different relationship group members
- Assign primary and secondary designations to the two most important members of a relationship group
- View roll-up related lists of all activities for the members of a relationship group

#### EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

#### USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups

AND

Create and Edit on relationship group members

AND

Read on accounts

To delete relationship groups:

- Delete on relationship groups

To remove relationship group members:

- Delete on relationship group members

- View roll-up related lists of the custom objects that are related to the accounts in a relationship group

SEE ALSO:

- [Using Relationship Groups](#)
- [Relationship Group Considerations](#)

Relationship Group Fields

A relationship group custom object has the following default fields, listed in alphabetical order.

Name	Description
Description	A text description of the relationship group. Up to 255 characters are allowed.
Primary Name	The name of the primary <a href="#">relationship group member</a> .
Secondary Name	The name of the secondary <a href="#">relationship group member</a> .
Total Members	The total number of members in the relationship group.

EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

To add custom fields to relationship groups, from the object management settings for relationship groups, go to the fields area, then click **New** in the Custom Fields & Relationships section.

SEE ALSO:

- [Relationship Groups Overview](#)
- [Using Relationship Groups](#)

## Relationship Group Members

Relationship groups let you group closely related accounts together so you can manage them easier. The accounts that you add to the group are the members. For example, a relationship group might be medical practice or a law firm, while the individual doctors or lawyers would be the group members.



**Note:** Relationship groups are only available upon request to [Salesforce for Wealth Management](#) customers. Note that the Relationship Groups tab may be named “Households” in Salesforce for Wealth Management organizations. To enable relationship groups, contact your Salesforce representative.

### What Are Relationship Group Members?

The accounts that you add to relationship groups are called *relationship group members*. Like relationship groups, relationship group members are custom objects. Each relationship group member record represents an association between an account and a relationship group. For example, if you add the account “Mary Smith” to the relationship group “Smith Family,” a relationship group member record is created that links Mary Smith to the Smith Family.

Relationship group members are unique because they have two master-detail relationships: one with accounts and another with relationship groups. When discussing these master-detail relationships, accounts and relationship groups are sometimes referred to as the “parents” of relationship group members.

### What Are the Limits on Relationship Group Members?

You can add a given account to up to 200 relationship groups. For example, an account “Joseph Brown” who is an attorney may be a member of several relationship groups—in some cases as an attorney, in other cases as a family member.

You can add up to 20 accounts to a particular relationship group. For example, a relationship group that represents a large extended family including grandparents, children, and grandchildren cannot have more than 20 relationship group members.

In a particular relationship group, you can specify only one relationship group member as primary, and only one relationship group member as secondary. In addition, you cannot add the same account more than once to a particular relationship group.

### Where Can I View Relationship Group Members?

The Relationship Group Members related list displays on both the relationship group detail page and the account detail page. On the relationship group detail page, the related list summarizes the accounts that are members of the given relationship group. On the account detail page, the related list summarizes the relationship groups of which the given account is a member.

### Relationship Group Member Fields

Relationship group members have the following fields.

Field Name	Description
Account	The name of the account.

#### EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

#### USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups
- AND
- Create and Edit on relationship group members
- AND
- Read on accounts

To delete relationship groups:

- Delete on relationship groups

To remove relationship group members:

- Delete on relationship group members

Field Name	Description
Role	The familial, professional, or other role that an account has in a relationship group - for example, Client, Spouse, Child, Attorney, or Accountant. Your administrator defines the available values in this picklist.
Primary	Designates an account as the most important member of the relationship group. Only one relationship group member can be specified as primary.
Secondary	Designates an account as the second-most important member of the relationship group. Only one relationship group member can be specified as secondary.
Include in Roll-up	Specifies whether the activities and custom objects of an account display in related lists on the relationship group detail page.
Priority	Does not display in the relationship group wizard, but is available as a column in the Relationship Group Members related list on account and relationship group detail pages. This column displays the primary (1) or secondary (2) icon as appropriate next to account names.
Unique Key	This is a system field that prevents duplicate records. It does not display to users in Salesforce but is visible in the Force.com API. This field should be treated as read only; attempts to modify it through the API will be ignored.

## SEE ALSO:

[Relationship Groups Overview](#)
[Relationship Group Considerations](#)

## Relationship Group Considerations

To make the most of relationship groups and relationship group members, review the notable behaviors and limitations below.

### Relationship Group Considerations

Relationship groups:

- Support roll-up related lists for activities and custom objects only.
- Are completely separate from the Partners related list on accounts.
- Do not have directly associated activities, notes, or attachments.
- Only support required custom fields that are configured with a default value. Such custom fields will display on relationship group detail and edit pages, but not in the relationship groups wizard.
- Only support validation rules on custom fields that were added after the Relationship Group managed package was installed.
- Cannot be renamed to a different name than “relationship group,” because they are a custom object in a managed package.

#### EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

- Can be created and edited through the relationship group wizard regardless of field-level security settings on the `Description` field.

## Relationship Group Member Considerations

Relationship group members:


- Are limited to a maximum of 20 per relationship group.
- Cannot be imported via the import wizard for custom objects.
- Do not support tagging.
- Have the division of the parent relationship group.
- Are owned by both the parent relationship group and the parent account.
- Do not support validation rules.
- Do not support universally required fields.
- Cannot be renamed to a different name than “relationship group member,” because they are a custom object in a managed package.
- Can have the fields `Primary`, `Secondary`, and `Include in Roll-Up` edited through the relationship group wizard even when the field-level security on those fields is “read-only.”
- Cannot be included in workflow rules or approval processes.
- Cannot be used in Salesforce to Salesforce.
- Are not supported in Connect Offline.
- Are only supported in API version 11.0 and later. In the API, using the `upsert` call on relationship group members is not supported.

SEE ALSO:

[Relationship Groups Overview](#)

[Relationship Group Members](#)

## Using Relationship Groups

 **Note:** Relationship groups are only available upon request to [Salesforce for Wealth Management](#) customers. Note that the Relationship Groups tab may be named “Households” in Salesforce for Wealth Management organizations. To enable relationship groups, contact your Salesforce representative.

You can perform the following actions with relationship groups:

- [Creating Relationship Groups](#)
- Add an account to the relationship group. To add an account, go to the account’s Relationship Group Members related list, and click **New**.
- [Editing the Members of Relationship Groups](#)
- [Displaying and Editing Relationship Groups](#)
- [Searching for Relationship Groups](#)
- [Deleting Relationship Groups](#)
- [Removing Members from Relationship Group Members](#)

SEE ALSO:

[Relationship Groups Overview](#)

### EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

### USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups

AND

Create and Edit on relationship group members

AND

Read on accounts

To delete relationship groups:

- Delete on relationship groups

To remove relationship group members:

- Delete on relationship group members



## Creating Relationship Groups

Salesforce provides an easy wizard so you can quickly create and edit relationship groups. To create a new relationship group:

1. On the Relationship Groups home page, click **New** next to `Recent Relationship Groups`.
2. Enter the name and description of the relationship group:
  - a. Enter a name for the relationship group.
  - b. Optionally, enter a description for the relationship group.
  - c. Click **Next** to continue.
3. Define the members of the relationship group:
  - a. Use the lookup fields to select the appropriate records.
  - b. In the `Role` drop-down list, specify the appropriate role for each person in the relationship group.
  - c. Designate one of the records as primary.
  - d. Designate another record as secondary.
  - e. Optionally, click **Add Member** as needed to include additional members. You can add a maximum of 20 records to a relationship group.
  - f. Select `Include in Roll-up` for the accounts whose related activities and custom objects should display on the relationship group detail page.
  - g. Click **Save** to finish.
4. After completing the wizard, the detail page of the new relationship group displays so you can review your work.



**Note:** You can also add an account to a new or existing relationship group. To add an account, go to the Relationship Group Members related list and click **New**.

### SEE ALSO:

[Relationship Groups Overview](#)

[Relationship Group Members](#)

### EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

### USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups

AND

Create and Edit on relationship group members

AND

Read on accounts

To delete relationship groups:

- Delete on relationship groups

To remove relationship group members:

- Delete on relationship group members

## Adding Accounts to Relationship Groups

Salesforce provides an easy wizard so you can quickly create and edit relationship groups. On the Accounts tab, you can add an account to a new or existing relationship group:

1. Open the detail page for the account you want to add to a relationship group.
2. On the Relationship Group Members related list, click **New**.
3. Choose whether to add the account to an existing relationship group or a new relationship group:
  - If you are adding the account to an existing relationship group, click the lookup icon to find the appropriate relationship group.
  - If you are adding the account to a new relationship group, enter a name and optionally a description for the new relationship group.
4. Click **Next**.
5. Define the members of the relationship group:
  - a. Use the lookup fields to select the appropriate records.
  - b. In the **Role** drop-down list, specify the appropriate role for each person in the relationship group.
  - c. Designate one of the records as primary.
  - d. Designate another record as secondary.
  - e. Optionally, click **Add Member** as needed to include additional members. You can add a maximum of 20 records to a relationship group.
  - f. Select **Include in Roll-up** for the accounts whose related activities and custom objects should display on the relationship group detail page.
  - g. Click **Save** to finish.
6. After completing the wizard, the detail page of the new relationship group displays so you can review your work.

SEE ALSO:

[Relationship Groups Overview](#)

### EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

### USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups
- AND
- Create and Edit on relationship group members
- AND
- Read on accounts

To delete relationship groups:

- Delete on relationship groups

To remove relationship group members:

- Delete on relationship group members

## Editing the Members of Relationship Groups

Salesforce provides an easy wizard so you can quickly create and edit relationship groups. To edit the members of a relationship group:

1. Click **New** or **Edit** on the Relationship Group Members related list of a relationship group detail page. Alternatively, click **Edit** next to a member listed on the Relationship Group Members list of an account detail page.
2. To remove an account from the relationship group, click **[remove]**.
3. To add an account to the relationship group, enter an account name in an empty Account lookup field.
4. In the **Role** drop-down list, choose a role for each member of the relationship group.
5. In the **Primary** column, select a primary relationship group member.
6. In the **Secondary** column, select a secondary relationship group member.
7. Select **Include in Roll-up** for the accounts whose related activities and custom objects should display on the relationship group detail page.
8. Optionally, click **Add Member** as needed to include additional members. You can add a maximum of 20 records to a relationship group.
9. Click **Save** to finish.

### SEE ALSO:

[Relationship Groups Overview](#)

[Relationship Group Members](#)

### EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

### USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups

AND

Create and Edit on relationship group members

AND

Read on accounts


To delete relationship groups:

- Delete on relationship groups

To remove relationship group members:

- Delete on relationship group members

## Displaying and Editing Relationship Groups

 **Note:** Relationship groups are only available upon request to [Salesforce for Wealth Management](#) customers. Note that the Relationship Groups tab may be named “Households” in Salesforce for Wealth Management organizations. To enable relationship groups, contact your Salesforce representative.

The following sections describe how to display and edit relationship groups:

- [Accessing the Relationship Groups Tab](#)
- [Viewing Relationship Group Lists](#)
- [Displaying Relationship Group Records](#)
- [Editing Relationship Group Records](#)

### Accessing the Relationship Groups Tab

The Relationship Groups tab is available by default in the Relationship Groups app. To switch to the Relationship Groups app, select Relationship Groups from the Force.com app menu in the top right corner of every Salesforce page.

Note that your administrator may have customized your profile to also display the Relationship Groups tab in other apps.

### Viewing Relationship Group Lists

You can work with relationship group list views as you would any other custom object. .

### Displaying Relationship Group Records

To open an individual relationship group record, click a relationship group name on the relationship groups home page or a relationship groups list view.

Note the following when viewing related lists on the relationship group detail page:

- The Relationship Group Members related list summarizes the accounts that are members of the relationship group. In the `PRIORITY` column, the icons (👤 and 👥) show which accounts are defined as primary or secondary for the relationship group. For more information on relationship group members, see [Relationship Group Members](#) on page 137.
- The Activity History and Open Activities related lists on a relationship group are roll-ups of activities for the relationship group members; relationship groups themselves do not have their own tasks and events.
- If accounts have a relationship with a custom object, a related list for that custom object can display on the relationship group detail page. This requires that `Include in Roll-Up` is selected on an associated relationship group member record. For example, in the following theoretical scenario, the vehicles associated with members of the Stone family display in a Vehicles related list on both the account detail page and the relationship group detail page:
  - The account Sam Stone has a Toyota Prius car tracked in the Vehicles custom object related list on the account detail page
  - The account Chris Stone has a Ford Mustang car tracked in the same related list
  - Sam and Chris Stone are members of the Stone Family relationship group
  - Both associated relationship group member records have `Include in Roll-Up` selected

#### EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

#### USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups
- AND
- Create and Edit on relationship group members
- AND
- Read on accounts

To delete relationship groups:

- Delete on relationship groups

To remove relationship group members:

- Delete on relationship group members

## Editing Relationship Group Records

On the relationship group detail page, you can:

1. Click **Edit** to change the fields in the Relationship Group Detail section.
2. Click **Delete** to delete the relationship group. For more information, see [Deleting Relationship Groups](#) on page 146.
3. Click **Clone** to create a copy of the relationship group.
4. On the Relationship Group Members related list, click **New** to add an account to the relationship group. For more information, see [Editing the Members of Relationship Groups](#) on page 143.
5. On the Activity History and Open Activities related lists, click the buttons such as **New Task** and **Log a Call** to add activity records for a relationship group member. By default, the new activity records are associated with the primary account on the relationship group.

SEE ALSO:

[Relationship Group Fields](#)

[Relationship Groups Overview](#)

## Searching for Relationship Groups

1. Enter your search terms in the sidebar or header search box.
2. Click **Search**.
3. From the search results, click an item to open it or click **Edit**, if available.

Your administrator can customize the search layout for relationship groups to include the primary and secondary account fields, so you can view and access those account records directly from relationship group search results.

### SEE ALSO:

[Relationship Groups Overview](#)

#### EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

#### USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups
- AND
- Create and Edit on relationship group members
- AND
- Read on accounts

To delete relationship groups:

- Delete on relationship groups

To remove relationship group members:

- Delete on relationship group members

## Deleting Relationship Groups

Relationship groups are custom object records that you can delete as you would any other record.

A relationship group is the master object in a master-detail relationship with relationship group members. Consequently, when you delete a relationship group, all relationship group members on that relationship group are also deleted. Restoring a relationship group from the Recycle Bin also restores the associated relationship group members that were deleted. However, if you delete a relationship group that contains the same relationship group member as a deleted account, the shared relationship group member cannot be restored from the Recycle Bin.

### SEE ALSO:

[Removing Members from Relationship Group Members](#)  
[Relationship Groups Overview](#)

#### EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

#### USER PERMISSIONS

To delete a relationship group:

- Delete on relationship groups

## Removing Members from Relationship Group Members

To remove an individual relationship group member, go to the Relationship Group Members related list on an account or relationship group detail page and click **Del** next to the appropriate relationship group member record.

Relationship group members are unique because they have two master-detail relationships: one with accounts and another with relationship groups. Also, there are rules that govern the number of relationship group members a relationship group can have, as well as prevent more than one relationship group member from being specified as either primary or secondary on a given relationship group. The following considerations apply to deleting relationship group members:

### Deleting Accounts with Relationship Group Members

When you delete an account, its associated relationship group members are also deleted. However, you cannot restore an account from the Recycle Bin if restoring the account's deleted relationship group members would violate rules such as the maximum of 20 relationship group members per relationship group. Also, if you delete an account that shares a relationship group member with a deleted relationship group, the shared relationship group member is automatically purged from the Recycle Bin.

### Deleting Relationship Groups with Relationship Group Members

See [Deleting Relationship Groups](#) on page 146.

### Restoring Individual Relationship Group Members

You cannot restore an individual relationship group member from the Recycle Bin in the following scenarios:

- Restoring the record would violate rules such as the maximum of 20 relationship group members per relationship group
- The deleted relationship group member was deleted during an account merge

Relationship group members are automatically and irrecoverably removed from the Recycle Bin in the following scenarios:

- If both parents (the relationship group and the account) of a relationship group member are deleted, the relationship group member is removed
- If a relationship group member is deleted individually and then one of its parents is deleted, the relationship group member is removed

#### SEE ALSO:

[Relationship Group Members](#)

[Deleting Relationship Groups](#)

#### EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

#### USER PERMISSIONS

To remove a relationship group member:

- Delete on relationship group members

# Campaigning and Generating Leads

## Planning, Managing, and Tracking Campaigns

### Campaigns

Manage outbound marketing campaigns with direct mail programs, seminars, print ads, email, and other kinds of marketing collateral. Organize campaigns into hierarchies for easy analysis to see what works best for increasing your company's sales.

Salesforce makes it easy for you to quickly locate, manage, and report on campaigns.

SEE ALSO:

[Campaigns Home](#)

[Five Steps for Managing Campaigns](#)

[Considerations for Campaigns](#)

### Campaigns Home

Clicking on the Campaigns tab displays the campaigns home page. Any user can access the campaigns home page.

- To show a filtered list of items, select a predefined list from the **view** drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the **view** drop-down list and click **Edit**.
- In the **Recent Campaigns** section, select an item from the drop-down list to display a brief list of the top campaigns matching that criteria. From the list, you can click any campaign name to go directly to the campaign detail. Toggle the **Show 25 items** and **Show 10 items** links to change the number of items that display. The fields you see are determined by the "Campaigns Tab" search layout defined by your administrator and by your field-level security settings (available in Professional, Enterprise, Unlimited, Performance, and Developer Editions). The Recent Campaigns choices are:

Recent Campaigns Choice	Description
Recently Viewed	The last ten or twenty-five campaigns you viewed, with the most recently viewed campaign listed first. This list is derived from your recent items and includes records owned by you and other users.
My Active Campaigns	The most recent ten or twenty-five campaigns marked as Active, with the most recently created campaign listed first. This list only includes records owned by you.

- In the **Recent Campaigns** section, click **New** to create a new campaign.

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

#### USER PERMISSIONS

To view Campaigns tab:

- Read on campaigns

To view campaigns:

- Read on campaigns

To create campaigns:

- Create on campaigns



- Under **Reports**, click any report name to jump to that report.

SEE ALSO:

[Campaigns](#)

[Manage Campaigns](#)

## Considerations for Campaigns

Review the following considerations before working with campaigns.

### Communities

When working with campaigns within a community, there are some limitations.

- The View Campaign Hierarchy action does not appear on campaign detail pages.
- The Campaign Influence and Campaign Member Status related lists do not appear.
- You can't drill into the Campaign Hierarchy related list.
- The Add to Campaign action does not appear on the Lead Home or Contact Home pages.

SEE ALSO:

[Campaigns](#)

#### EDITIONS

Available in: Salesforce  
Classic and Lightning  
Experience

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

## Manage Campaigns

Make your marketing programs and post-campaign analysis more effective.

See the [Campaign Management Implementation Guide](#) for additional information.

### 1. Create the campaign.

After determining your marketing strategy, create a campaign to track your efforts.

### 2. Create your target list.

Define who you want to target with your campaign. The method used to create a target list depends on who you're targeting.

- **Rented or Purchased Lists:** Use the list of names as your target list. We recommend that you do not import the names into the system yet.
- **Existing Contacts, Leads, or Person Account:** Run a contact, lead, or person account report in Salesforce. Then use the **Add to Campaign** button to associate those records with your campaign. Or, go to a list view of contacts or leads and use the **Add to Campaign** button to associate those records with your campaign. Person accounts are included in contact list views. See [Managing Campaign Members](#) on page 158.

### 3. Execute the campaign.

All campaign execution occurs outside of Salesforce—either online or offline.

- **Online:** Send email using an email execution vendor.
- **Offline:** Plan and host a conference, run print or radio advertisements, send direct mail pieces, or host a Web seminar.

### 4. Track responses.

Campaign responses can be divided into these groups based on the response tracking mechanism.

- **Website Response:** Prospects respond by completing a form on your website. Use Web-to-Lead to set up a jump page or microsite for the campaign. All responses are created as leads, and if the Web form includes the `Campaign` field value, the leads are directly associated to the campaign. You can also include the `Member Status` field in the form to automatically mark all submissions with a particular member status.
- **Manual Update:** Customers and prospects respond via phone or mail. A sales or marketing team member can manually update the Campaign History for the lead, contact, or person account.
- **Mass Update/Offline Response:** This includes any response that you track in an offline list, for example, trade show attendance or email responses from your email vendor. In Salesforce, use the Manage Members page to update the member status of leads, contacts, or person accounts that have been associated with your campaign. See [Editing Multiple Campaign Members](#) on page 160. Alternatively, import the offline list into Salesforce via the Data Import Wizard. See [Add or Update Campaign Members with the Data Import Wizard](#).

### 5. Analyze campaign effectiveness.

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

#### USER PERMISSIONS

To view campaigns:

- Read on campaigns

To create campaigns:

- Create on campaigns
- AND

Marketing User checked in your user information

To change campaigns:

- Edit on campaigns
- AND

Marketing User checked in your user information

Analyze the effectiveness of the campaign using reports and campaign statistics. See [Displaying and Editing Campaigns](#) on page 152 for information on calculating statistics.

SEE ALSO:

[Campaigns FAQ](#)

## View Campaign Hierarchies

A campaign hierarchy allows you to group campaigns together within a specific marketing program or initiative, which enables you to analyze related marketing efforts more efficiently.

To view the hierarchy for a campaign, click **View Hierarchy** next to the `Campaign Name` field on the campaign detail page. If a campaign is not part of a hierarchy, its corresponding Campaign Hierarchy page shows only the campaign that you selected.

A campaign hierarchy shows campaigns that are associated with one another via the `Parent Campaign` field. A hierarchy illustrates a relationship between campaigns, such as a grouping of campaigns within a specific marketing tactic. Each campaign can have only one parent campaign but an unlimited number of sibling campaigns. A campaign hierarchy can contain a maximum of five levels or generations. In other words, a campaign hierarchy has a maximum depth of five levels but an unlimited breadth on each level. Campaign members, such as contacts and leads, can be included on any level.

On the Campaign Hierarchy page, campaigns are indented to show that they are related to the campaigns above them. Campaigns are listed in descending order based on their hierarchy level. Click any campaign name to open the detail page for that campaign.

Statistics for an individual campaign are in the Campaign Statistics section of the campaign detail page. Aggregate statistics for parent and child campaigns are in the Campaign Hierarchy related list.



**Note:** To ensure accurate reporting, all campaigns in a hierarchy must use the same currency.

SEE ALSO:

[Set Up Campaign Hierarchies](#)

[Viewing Campaign Hierarchy Statistics](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view campaigns:

- Read on campaigns

To view campaign hierarchies:

- Read on campaigns

AND

Read on the Parent Campaign field on campaigns

## Viewing Campaign Hierarchy Statistics

Campaign detail pages include a Campaign Hierarchy related list, which displays a parent campaign and all the campaigns directly below the parent campaign in the campaign hierarchy. You can create a campaign hierarchy by associating campaigns with one another using the `Parent Campaign` lookup field on the campaign detail page. Click any campaign in the related list to open the detail page for that campaign.

The Campaign Hierarchy related list provides statistics fields for each campaign in the list as well as the total value for the parent campaign and all the campaigns below it in the campaign hierarchy. Statistics fields are not visible in the related list until campaign hierarchies are enabled for your organization. For more information and a list of fields, see [Set Up Campaign Hierarchies](#) on page 157.

The Campaign Hierarchy related list shows a maximum of two hierarchy levels: the parent campaign and its child campaigns. If a child campaign has children, those children do not appear in the related list but their data is included in the campaign hierarchy statistic field values. The campaign hierarchy statistic fields provide aggregate data regardless of whether you have sharing rights to view individual campaigns within the hierarchy. However, if you do not have access to a campaign that appears in the related list, you cannot view its detail page from the link on the related list. To view all the levels in a campaign hierarchy, click the **View Hierarchy** link next to the `Campaign Name` on the campaign detail page.

### SEE ALSO:

[Displaying and Editing Campaigns](#)  
[Campaign Fields](#)

## Displaying and Editing Campaigns

### Displaying Campaigns

Once you have located a campaign on the campaigns home or list pages, click the campaign name to display detailed information. You can also select a campaign name from the Campaign History related list of an associated lead, contact, or person account. If hover details are enabled, hover over any lookup field on the detail page to view key information about a record before clicking into that record's detail page.

### Editing Campaigns

To update a campaign, click **Edit**, and then change the fields you want to update. When you have finished, click **Save**. You can also click **Save & New** to save the current campaign and create another.

Use inline editing to edit fields directly on the detail page. If inline editing isn't enabled, contact your administrator.



**Note:** To edit a campaign that is a child of another campaign, you must have at least "Read" access on the parent.

### Creating Campaign Hierarchies

When creating or editing a campaign you can use the `Parent Campaign` lookup field to assign a parent to your campaign. In the lookup dialog you can search for an existing campaign or create a new parent campaign. For more information on configuring campaign hierarchies for your organization, see [Set Up Campaign Hierarchies](#) on page 157.

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

#### USER PERMISSIONS

To view campaigns:

- Read on campaigns

To view campaign hierarchies:

- Read on campaigns

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

#### USER PERMISSIONS

To view campaign lists:

- Read on campaigns

To change campaigns:

- Edit on campaigns

AND

Marketing User checked in your user information

### Calculating Campaign Statistics

The campaign detail includes campaign statistic fields, which are updated automatically and include values from all associated records regardless of whether you have read access to those records. If you have campaign hierarchies enabled, the Campaign Hierarchy related list contains aggregate statistics for a parent campaign and all the campaigns below it in the campaign hierarchy.



**Note:** The campaign statistics calculation process runs every two minutes and processes one campaign's statistics at a time. If there are a large number of campaigns or campaigns with large numbers of campaign members pending, there may be a delay of 10 minutes or more.

### Linking Contacts, Leads, or Person Account to Campaigns

Select an option from the **Manage Members** drop-down button on the campaign detail page.

### Advanced Setup

Click **Advanced Setup** to customize the `Member Status` values for a campaign. The `Member Status` values are the possible responses that a member can have to the campaign, for example, "Sent," "Responded," "Attended." See [Customizing Campaign Setup](#) on page 156.

### Campaign Related Lists

- Hover over the links at the top of a detail page to display the corresponding related list and its records. If Chatter is enabled, hover links display below the feed. An interactive overlay allows you to quickly view and manage the related list items. Click a hover link to jump to the content of the related list. If hover links are not enabled, contact your Salesforce administrator.
- The lower portion of the display provides information related to the campaign including activities, attachments, campaign members, campaign hierarchies, and the opportunities that resulted from the campaign. The related lists you see are determined by your personal customization, and by any customization your administrator has made to page layouts or your permissions to view related data. You can click individual items to display additional detail. Click **More** at the bottom of the page or **View More** below a related list to display more items.

### Printing Campaigns

To view a printable display of all information for the campaign, click **Printable View** on the campaign detail page. Use your browser's Print function to print the display.

### Sharing

To share a campaign with other users, groups, or roles, click **Sharing**. See [Sharing Campaigns](#) on page 181.

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

SEE ALSO:

[Manage Campaigns](#)

## Add Individual Members to Campaigns

Hand-pick individual campaign members from contact, lead, or person account detail pages.

1. From a contact, lead, or person account detail page, go to the Campaign History related list and click **Add to Campaign**.
2. Specify the campaign.
3. On the Campaign Member Edit page, specify the campaign member status.
4. Save your work.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To add or clone a campaign member:

- Read on campaigns
- AND
- Edit on leads and contacts

To edit individual campaign members:

- Read on campaigns
- AND
- Read or Edit on leads or contacts

## Add Members to Campaigns from Accounts

Choose campaign members from the Contacts related list on your accounts.

1. From an account detail page, go to the Contacts related list.
2. Add one or more contacts as campaign members.
  - To add a single campaign member, choose **Add to Campaign** from the Actions menu next to the contact.
  - To add more than one member, click **View All**, then select campaign members and click **Add to Campaign**. The maximum number of contacts viewable per page is 200.
3. Specify the campaign.
4. Specify the campaign member status.
5. Click **Submit**.

### EDITIONS

Available in: Lightning Experience and Salesforce1

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

### USER PERMISSIONS

To add or clone a campaign member:

- Read on campaigns
- AND
- Edit on leads and contacts

To edit individual campaign members:

- Read on campaigns
- AND
- Read or Edit on leads or contacts

## Campaign History

Track changes to standard and custom fields on campaigns with the Campaign Field History related list.

The Campaign Field History related list of a campaign detail page tracks the changes to the campaign. Any time a user modifies any of the standard or custom fields whose history is set to be tracked on the campaign, a new entry is added to the Campaign Field History related list. All entries include the date, time, nature of the change, and who made the change. Modifications to the related lists on the campaign are not tracked in the campaign history.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view campaigns:

- Read on campaigns

## Customizing Campaign Setup

For each campaign, Marketing Users must define campaign `Member Status` values that a lead, contact, or person account has for a campaign. For example, you could define values of “Planned,” “Sent Invitation,” “RSVP,” and “Attended” for a conference. Not available in Lightning Experience.


### User Privileges for Customizing Campaign Setup

- Anyone can view a campaign's advanced setup. You can *edit* advanced setup if:
  - The `Marketing User` checkbox is selected in your user information
  - You have the “Edit” permission on campaigns
  - You have at least create sharing access on the campaign record
  - You are working in Salesforce Classic
- If you [replace member status values](#), all campaign records are updated regardless of your sharing access to the related contacts or leads.

### Defining Member Status Values

New campaigns have two default member status values: “Sent” and “Responded”. You can edit or create them.

1. Click **Advanced Setup** on a campaign detail page.
2. Click **Edit**.
3. Update the existing entries or add new values.
4. Click **Add More** to add entries. You can add up to 50 entries.
5. Select one entry as the “Default” value.
6. Choose which values count as “Responded.” Members with “Responded” values are tallied in the `Responses in Campaign` field on the campaign.

 **Note:** Modifying the Responded checkbox has broad effects. When you select or deselect the Responded checkbox, [campaign statistics](#) and campaign member details change accordingly. Specifically, the fields `Responded`, `Last Responded Date`, and `Last Modified` change on the campaign member record. For example, if you're working with a status called “Attended” and you select the `Responded` checkbox, existing campaign members whose status is “Attended” are counted as responses in campaign statistics and the date fields updated.

### Replacing Member Status Values

You can globally replace the `Member Status` values for each campaign member. For example, you decide that “Attended” is a more appropriate value than “Showed Up.”

1. Click **Advanced Setup** on a campaign detail page.
2. Click **Replace** in the Member Status Values related list.
3. Enter the value you want to change, and select the new value.
4. Click **Save**.

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

#### USER PERMISSIONS

To view campaigns:

- Read on campaigns


To customize member status values:

- Edit on campaigns

AND

`Marketing User` checked in your user information



 **Note:** Replacing the campaign member status doesn't recalculate roll-up summary fields or fire workflow, triggers, or validation rules.

SEE ALSO:

[Managing Campaign Members](#)


## Set Up Campaign Hierarchies

Analyze and report on the health of your related campaigns. By associating campaigns with one another using a lookup relationship, you can group campaigns within a specific marketing program or initiative.

Hierarchies contain up to five levels. Each campaign can have one parent campaign, but an unlimited number of sibling campaigns.

To set up campaign hierarchies, add the `Parent Campaign` field to your campaign page layout and enable the campaign hierarchy statistics fields.

Use field-level security to make the fields visible. As you make each field visible, Salesforce displays the field's value in the **Hierarchy Total** section of the Campaign Hierarchy related list.

 **Note:** The campaign hierarchy fields provide aggregate data for a parent campaign and all the campaigns below it in the campaign hierarchy, regardless of whether a user has sharing rights to a particular campaign within the campaign hierarchy. Therefore, consider your organization's campaign sharing settings when enabling campaign hierarchy fields. If you do not want users to see aggregate hierarchy data that includes campaigns to which the users do not have access, you can choose to remove any or all of the campaign hierarchy fields from the Campaign Hierarchy related list. If you do not add the campaign hierarchy fields to the related list or page layout, you can still access these fields on reports.

Once campaign hierarchies are set up, users can create and assign parent campaigns using `Parent Campaign` and then view details about the hierarchy on the Campaign Hierarchy page or the Campaign Hierarchy related list.

 **Note:** All campaigns within a hierarchy must use the same currency.

The Campaign Hierarchy page, accessible from the **[view hierarchy]** link next to the **Campaign Name** on the campaign record, shows all the levels in a hierarchy and the campaigns included in each level. For more information, see [View Campaign Hierarchies](#) on page 151. The Campaign Hierarchy related list provides aggregate data for the parent campaign and all the campaigns below it in the hierarchy. For more information see [Viewing Campaign Hierarchy Statistics](#) on page 152.

SEE ALSO:

[Customizing Campaign Setup](#)

[Campaign Fields](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To create a campaign hierarchy:

- Create on campaigns AND Marketing User enabled in your user detail page

To set up campaign hierarchies:

- Customize Application

## Managing Campaign Members

### Managing Campaign Members

Campaign members are created from lead, contact, or person account records. Salesforce provides a variety of ways in which you can manage your campaign members. You can search for and add or edit multiple leads and contacts from the Manage Members page. You can add members to a campaign one at a time from contact or lead detail pages. With the Data Import Wizard, you can add up to 50,000 leads, contacts, or person accounts at a time to a campaign. You can also use the Data Import Wizard to update the statuses of up to 50,000 campaign members at a time.

#### Adding Campaign Members

You can [add new members to a campaign](#):

- Individually from the Campaign History related list on a contact, lead, or person account detail page
- By searching for contacts and leads from the [Manage Members page](#)
- [From a campaign, contact, person account, or lead report](#)
- [From a list view of existing contacts or leads](#)
- [From a CSV import file of existing leads](#)
- [From a CSV import file of existing contacts](#)
- [From a CSV import file of existing person accounts](#)
- [From a CSV import file of new leads](#)
- [From a CSV import file of new contacts](#)

#### Editing Campaign Members

You can edit the details of existing campaign members:

- Campaign History related list on a contact, lead, or person account detail page
- [From the Campaign Members related list](#) on a campaign detail page
- [From the Manage Members page](#)

#### Updating the Status of Existing Campaign Members

You can update the status of existing campaign members:

- From the Campaign History related list on a contact, lead, or person account detail page
- [From the Manage Members page](#)
- [From a campaign, contact, person account, or lead report](#)
- [From a CSV import file of existing members](#)

#### Removing Campaign Members

You can remove members of a campaign:

- From the Campaign History related list on a contact, lead, or person account detail page
- [From the Campaign Members related list](#) on a campaign detail page

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

- [From the Manage Members page](#)

#### Example Uses

- **Create follow-up campaigns**—Search for a custom list view of contacts or leads that is restricted to an earlier campaign and a certain member status, such as “Attended”. Then add items from the generated list to a follow-up campaign. See [Add Multiple Members to a Campaign from a List View](#) on page 164.
- **Leverage reporting functionality**—Customize a standard report or build a new custom report that returns a list of contacts, person account, or leads that you want to target. With the click of a button, you can add the entire list to a campaign. See [Add Campaign Members from Standard and Custom Reports](#) on page 162.

#### SEE ALSO:

[Manage Campaign Members](#)

[Campaigns FAQ](#)


## Editing Multiple Campaign Members

Editing Campaign Members from the Manage Members Page

 **Note:** Before using the Manage Members page, verify that you are using a supported browser.

To update the campaign member status, edit campaign member details, or remove campaign members from the Manage Members page:

1. Click **Manage Members** and choose **Edit Members - Search** from the drop-down button on a campaign detail page or the Campaign Members related list on a campaign detail page.
2. On the Existing Members subtab, optionally enter filter criteria to find existing members and click **Go!**.

 **Note:** For campaigns with campaign members created from both leads and contacts, you must have “Read” permission on leads and contacts to see all members. If you only have “Read” on leads, you see only campaign members created from leads. If you only have “Read” on contacts, you only see campaign members created from contacts.

3. Select the checkboxes next to the records you want to edit. To select all records on the current page, select the checkbox in the header row.
4. Optionally perform the following actions:
  - To change the campaign member status, select a status from the **Update Status** drop-down list.
  - To remove a member from a campaign, click **Remove**.
  - To edit the details of a campaign member, click **Edit**.
  - To [view, edit, delete, clone, a campaign member](#), click the campaign member's name in the Name column.

The latest Manage Members page is not available in accessibility mode. In accessibility mode, you can still [add contacts or leads to a campaign](#), [update campaign members](#), and [remove campaign members](#) using the campaign member wizards.

To update large numbers of campaign members, you can use the Data Loader application to export and then reimport campaign member data. Before uploading a CSV file with Data Loader, be sure to sort the file by Campaign ID. If you have problems reimporting your data, try splitting up the CSV file into a few smaller files and uploading them separately.

SEE ALSO:

[Manage Campaign Members](#)

[Adding Multiple Campaign Members](#)

[Displaying and Editing a Campaign Member](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view the Existing Members tab:

- Edit on campaigns
- AND
- Read on leads or contacts
- AND
- Marketing User checked in your user information

To update and remove campaign members:

- Edit on campaigns
- AND
- Edit on leads and contacts
- AND
- Marketing User checked in your user information

## Manage Campaign Members

Manage campaign members directly from a campaign detail page.

Use the **Manage Members** option in the Campaign Members related list and in the campaign detail section to search for leads and contacts and add them as campaign members, update or remove existing members, and add or update campaign members using an import file.

You use the Campaign Members related list to:

- Add individual members from a search
- Add multiple members from an import file
- Edit members
- Update member statuses from an import file

### SEE ALSO:

[Adding Multiple Campaign Members](#)

[Editing Multiple Campaign Members](#)

[Importing Campaign Members](#)

[Managing Campaign Members](#)

[Delete Multiple Contacts and Leads from Campaigns](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To add or clone a campaign member:

- Read on campaigns
- AND
- Edit on leads and contacts

To view and edit the campaign members related list:

- Read on campaigns
- AND
- Read on leads or contacts

To view and use the **Manage Members** button on the campaign members related list:

- Edit on campaigns
- AND
- Read on leads or contacts

## Adding Multiple Campaign Members


### Adding Campaign Members from the Manage Members Page

You can add leads and contacts as members of a campaign from the Manage Members page. To add contacts to a campaign, the [Add to Campaign checkbox must be enabled](#).

 **Note:** Before using the Manage Members page, verify that you are using a supported browser.

To add campaign members from the Manage Members page:

1. Click **Manage Members** and choose **Add Members - Search** from the drop-down button on a campaign detail page or the Campaign Members related list.
2. On the Add Members subtab, select the **Leads** or **Contacts** radio button to add leads or contacts, respectively.
3. Search for leads or contacts:
  - You can specify search filters and click **Go!**
  - Alternatively, you can select an existing view, such as all open leads, from the Use Existing View drop-down list. Your results will display automatically. If you select an existing view, you can modify its criteria by adding or changing filters, and clicking **Go!**

 **Note:** You cannot modify filter criteria if you selected a view that uses advanced options or that uses more than five filters. Filter criteria will be reflected in your search results for these views, though not all filter criteria will display.

4. Select the checkboxes next to the records you want to add. To select all records on the current page, select the checkbox in the header row.
5. Select a status from the **Add with Status** drop-down list.

A confirmation message will display and you will see the members you added on the Existing Members subtab.

 **Note:** If you are unable to add contacts, enable the [Add to Campaign checkbox](#):

1. From the object management settings for contacts, go to Search Layouts.
2. Click **Edit** next to Contacts List View.
3. Select [Add to Campaign](#).
4. Click **Save**.

The latest Manage Members page is not available in accessibility mode. In accessibility mode, you can still [add contacts or leads to a campaign](#), [update campaign members](#), and [remove campaign members](#) using the campaign member wizards.

SEE ALSO:

[Manage Campaign Members](#)

[Editing Multiple Campaign Members](#)

## Add Campaign Members from Standard and Custom Reports

### USER PERMISSIONS

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To add campaign members:

- Edit on campaigns

AND

Edit on leads and contacts

AND

Marketing User checked in your user information

To remove campaign members:

- Read on campaigns

AND

Edit on leads or contacts

To add campaign members from a contact report:	Marketing User checked in your user information
	AND
	Edit on campaigns
	AND
	Read on contacts
	AND
	Read on reports

To add campaign members from a lead report:	Marketing User checked in your user information
	AND
	Edit on campaigns
	AND
	Read on leads
	AND
	Read on reports

To add campaign members from a person account report:	Marketing User checked in your user information
	AND
	Edit on campaigns
	AND
	Read on contacts
	AND
	Read on reports

Adding members to a campaign is quick and easy when you add them from your lead, contact, and person accounts tabular, summary, and matrix reports.

Available in: Salesforce Classic and Lightning Experience

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

1. From a report that returns lead, contact, or person account records, click **Add to Campaign**.  
If the **Add to Campaign** button is disabled, modify your report to return fewer than 50,000 records.
2. Enter the name of a campaign.
3. Select a member status for the new members.
4. Choose whether members already associated with the campaign keep their status. If you want, update their status with the one you selected for new members.
5. In Lightning Experience, click **Submit**. In Salesforce Classic, click **Add to Campaign**.

6. In Lightning Experience, you receive an email when adding members is complete. In Salesforce Classic, review the confirmation screen and then click **Done**.

Be aware of these considerations when adding campaign members from a report:

- To add members to campaigns from custom reports, the report’s primary object must be lead or contact.
- To add members to campaigns from reports in Lightning Experience, the custom report type must include the Full Name field.
- If you interrupt the add campaign members process, some members can still be added to the campaign. That’s because members are added in batches.
- If lead or contact records are edited after you start the process but before they have been added, those records will not be added to the campaign.
- You can add active leads to campaigns—not converted leads. If converted leads appear on your report, don’t worry, only the active leads are added to the campaign.

SEE ALSO:

[Managing Campaign Members](#)

Add Multiple Members to a Campaign from a List View

USER PERMISSIONS		EDITIONS
To add contacts to a campaign:	Marketing User checked in your user information	Available in: Salesforce Classic and Lightning Experience
	AND	
	Edit on campaigns	
	AND	Available in: <b>Professional, Enterprise, Performance, Unlimited,</b> and <b>Developer</b> Editions
	Edit on contacts	
To add leads to a campaign:	Marketing User checked in your user information	
	AND	
	Edit on campaigns	
	AND	
	Edit on leads	
To add person accounts to a campaign:	Marketing User checked in your user information	
	AND	
	Edit on campaigns	
	AND	
	Edit on contacts	

Save time by adding up to 200 members to a campaign at once from your lead or contact list views. Or update the member status for members already associated with the campaign.



1. Navigate to a contact or lead list view.
2. Select up to 200 records to add to a campaign.
3. Click **Add to Campaign**.
4. Enter the name of a campaign.
5. Select a member status for the new members.
6. Choose whether members already associated with the campaign keep their current status. If you want, update their status with the one you selected for new members.
7. Add the members.


SEE ALSO:

[Managing Campaign Members](#)

## Displaying and Editing a Campaign Member

From the campaign member detail page, you can edit, delete, or clone a campaign member record. Additionally, if the campaign member is based on a lead, you can convert the lead; if the campaign member is based on a contact, you can create an opportunity.


To view the campaign member detail page, click the campaign member's name in the Name, First Name, or Last Name columns on the Campaign Members related list on a campaign detail page or on the Existing Members tab.

 **Note:** To view a campaign member, you must have permissions on the campaign and the lead or contact. For example, to view a campaign member created from a lead, you must be able to view both the campaign and the lead.

To edit the campaign member detail page layout, from the object management settings for campaign members, go to Page Layouts, and then click **Edit** next to the page layout name.

### Editing a Campaign Member

To edit a campaign member, click **Edit** on the campaign member detail page, change the fields you want to update, then click **Save**. Fields derived from the contact or lead can only be edited from the lead or contact detail pages.


 **Note:** If your administrator has enabled inline editing for your organization, you cannot use inline editing on the `Status` drop-down list on the campaign member detail page. Instead, click **Edit** on the campaign detail page to edit the `Status` drop-down list.

### Cloning a Campaign Member

To clone a campaign member, click **Clone** on the campaign member detail page, then select a campaign and a contact or lead. Change the fields you want to clone for the new campaign member, then click **Save**.

### Deleting a Campaign Member

To delete a campaign member, click **Delete** on the campaign member detail page.

 **Note:** Deleting a campaign member record is permanent; the record is not recoverable from the recycle bin. However, the original lead or contact record is not deleted.

### Converting a Lead

If the campaign member was created from a lead, you can click **Convert Lead** on the campaign member detail page to convert the lead. When you convert a lead, the campaign member is still a part of the campaign, but its type changes from lead to contact.

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

#### USER PERMISSIONS

To view, edit, or remove campaign members:

- Read on campaigns
- AND
- Read on leads
- AND
- Read on contacts

To add campaign members:

- Read on campaigns
- AND
- Edit on leads
- AND
- Edit on contacts

## Creating an Opportunity

If the campaign member was created from a contact, you can click **Create Opportunity** on the campaign member detail page to create an opportunity. When you create an opportunity, the campaign member is still a part of the campaign.

SEE ALSO:

[Campaign Member Fields](#)

## Campaign Member Fields

These are the fields (in alphabetical order) that make up a campaign member. Most campaign member fields are derived from the lead or contact record from which the campaign member was created and must be edited from the corresponding lead or contact record. Some of these fields may not be visible or editable depending on your page layout and field-level security settings.

Field	Description
Campaign	The campaign to which the lead or contact belongs.
Campaign Member Currency	The default currency for currency amount fields on the campaign member. Amounts display in the campaign member currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.
Campaign Member Type	The record type of the campaign member, which determines the page layout available for the campaign member. (Read only)
City	City portion of the lead or contact's address.
Company (Account)	The company, if the campaign member is based on a lead, or the account, if the campaign member is based on a contact.
Contact	The name of the contact, if the campaign member is based on a contact.
Country	Country portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Created By	User who created the campaign member. (Read only)
Created Date	Date the campaign member was created. (Read only)
Description	Description of the lead or contact.
Do Not Call	Whether the contact wants to be contacted by phone. If you use Data.com, the <code>Phone</code> field value is hidden from search results and on the Contact Card, and it's blank in <code>.csv</code> files that are created when you export records.
Email	Email address of the lead or contact.
Email Opt Out	Whether the contact wants to receive email. If you use Data.com, the <code>Email</code> field value is hidden from search results and on the Contact

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
	Card, and it's blank in .csv files that are created when you export records.
Fax	Fax number of the lead or contact.
Fax Opt Out	Whether the contact wants to be included in broadcast faxes.
First Name	First name of the lead or contact.
First Responded Date	Date the campaign member first responded. (Read only)
Last Modified By	User who last changed the campaign member record. (Read only)
Last Modified Date	Date the campaign member record was last modified. (Read only)
Last Name	Last name of the lead or contact.
Lead	The name of the lead, if the campaign member is based on a lead.
Lead Source	Source of lead, for example, Advertisement, Partner, or Web. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Mobile	Mobile phone number for the lead or contact.
Phone	Phone number for the lead or contact.
Responded	Indicates if the campaign member has responded.
Salutation	The salutation for addressing the person, for example, Mr., Ms., Dr., or Prof.
State/Province	State or province portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Status	The status of the campaign member, for example, sent or responded.
Street	Street portion of the lead or contact's address.
Title	The title of the lead or contact, for example, President.
Zip/Postal Code	Zip or postal code portion of the lead or contact's address.

## SEE ALSO:

[Displaying and Editing a Campaign Member](#)

[Adding Multiple Campaign Members](#)

## Importing Campaign Members

Add contacts, leads, and person accounts to campaigns via the Data Import Wizard.

With the Data Import Wizard, a designated marketing user can use a CSV (comma-separated values) file to import contacts, leads, or person accounts and track their responses at each stage of a campaign.

For example, you can mark each contact, lead, or person account as “Planned” at the beginning of the campaign. Then mark them as “Responded” after they respond. These responses are referred to as the member statuses.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

#### IN THIS SECTION:

##### [Add or Update Campaign Members with the Data Import Wizard](#)

To add or update many campaign members at once, launch the Data Import Wizard from the campaign detail page.

##### [Add Existing Contacts to a Campaign with the Data Import Wizard](#)

To add multiple contacts as members of a campaign, launch the Data Import Wizard from the campaign detail page.

##### [Add Existing Leads to a Campaign with the Data Import Wizard](#)

To add multiple leads as members of a campaign, launch the Data Import Wizard from the campaign detail page.

##### [Add Existing Person Accounts to a Campaign with the Data Import Wizard](#)

To add multiple person accounts as members of a campaign, launch the Data Import Wizard from the campaign detail page.

##### [Create Contacts and Add Them to a Campaign with the Data Import Wizard](#)

With a single import file, you can create multiple contacts at once and make them members of a campaign.

##### [Create Leads and Add Them to a Campaign with the Data Import Wizard](#)

To add multiple leads as members of a campaign, launch the Data Import Wizard from the campaign detail page.

#### SEE ALSO:

[Managing Campaign Members](#)


## Add or Update Campaign Members with the Data Import Wizard

To add or update many campaign members at once, launch the Data Import Wizard from the campaign detail page.

### Add Campaign Members

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Salesforce ID of the contact or lead. For person accounts, use the contact ID associated with the person account as the Salesforce ID.
- Campaign ID (if you're on a non-campaign page and want to import records)


 **Tip:** To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

1. From the campaign detail page, select **Manage Members > Add Members - Import File**.
2. The Data Import Wizard appears.
3. Select the CSV file that contains your import data, and click **Next**.
4. Map column headers from your CSV file to these fields.
  - Salesforce ID of the contact or lead. For person accounts, use the contact ID associated with the person account as the Salesforce ID.
  - Campaign ID (if you're on a non-campaign page and want to import records)
5. Click **Next**.
6. Review the import settings, and then click **Start Import**. When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

### Update Campaign Members

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Salesforce ID of the contact, lead, or campaign member. For person accounts, use the contact ID associated with the person account as the Salesforce ID.
- Status of the campaign member.

 **Tip:** To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

1. From the campaign detail page, select **Manage Members > Update Members - Import File**. The Data Import Wizard appears.
2. Select **Campaign Members**, then select **Update existing records**.
3. Select the CSV file that contains your import data, and click **Next**.
4. Map column headers from your CSV file to these fields.
  - Salesforce ID of the campaign member
  - Status of the campaign member
5. Click **Next**.
6. Review the import settings, and then click **Start Import**.

#### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

#### USER PERMISSIONS

To add or update campaign members via the Data Import Wizard:

- **Marketing User** selected in your user information
- AND
- Read on contacts OR Import Leads
- AND
- Edit on campaigns

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

SEE ALSO:

- [Manage Campaigns](#)
- [Importing Campaign Members](#)

Add Existing Contacts to a Campaign with the Data Import Wizard

USER PERMISSIONS

To add contacts that you own to a campaign via the Data Import Wizard:

- Marketing User** selected in your user information
- AND
- Create on accounts
- AND
- Read on contacts
- AND
- Edit on accounts and campaigns
- AND
- Import Personal Contacts

To add contacts owned by others to a campaign via the Data Import Wizard:


- Marketing User** selected in your user information
- AND
- Create on accounts
- AND
- Read on contacts
- AND
- Edit on accounts, contacts, and campaigns
- AND
- Modify All Data

EDITIONS

- Available in: both Salesforce Classic and Lightning Experience
- Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

To add multiple contacts as members of a campaign, launch the Data Import Wizard from the campaign detail page. Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Account: Salesforce ID
- Contact: Salesforce ID
- Contact: Last Name

 **Tip:** To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

1. If you're using Lightning Experience, from the campaign members related list, select **Import Leads and Contacts**. If you're using Salesforce Classic, from the campaign detail page, select **Manage Members > Add Members - Import File**. The Data Import Wizard appears.
2. Select **Accounts and Contacts**, then select **Update existing records**.
3. Set **Match Contact by** to **Salesforce.com ID**.
4. Set **Match Account by** to **Salesforce.com ID**.
5. Select the CSV file that contains your import data, and click **Next**.
6. Map column headers from your CSV file to these fields.
  - Account: Salesforce ID
  - Contact: Salesforce ID
  - Contact: Last Name
7. Click **Next**.
8. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

SEE ALSO:


[Importing Campaign Members](#)

## Add Existing Leads to a Campaign with the Data Import Wizard

To add multiple leads as members of a campaign, launch the Data Import Wizard from the campaign detail page.

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Salesforce ID of the lead
- Last Name of the lead

 **Tip:** To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

1. From the campaign detail page, select **Manage Members > Add Members - Import File**. The Data Import Wizard appears.
2. Select **Leads**, then select **Update existing records**.
3. Set **Match Lead by** to **Salesforce.com ID**.
4. Select **Assign leads to campaigns**.
5. Select the CSV file that contains your import data, and click **Next**.
6. Select **Assign contacts to campaigns**.
7. Map column headers from your CSV file to these fields.
  - Salesforce ID of the lead

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To add existing leads to a campaign via the Data Import Wizard:

- **Marketing User** selected in your user information
- AND
- Edit on campaigns
- AND
- Import Leads

- Last Name of the lead

8. Click **Next**.

9. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

SEE ALSO:

[Importing Campaign Members](#)

## Add Existing Person Accounts to a Campaign with the Data Import Wizard

To add multiple person accounts as members of a campaign, launch the Data Import Wizard from the campaign detail page.

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Salesforce ID of the contact associated with the person account
- Email



**Tip:** To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

1. From the campaign detail page, select **Manage Members > Add Members - Import File**. The Data Import Wizard appears.
2. Select **Person Accounts**, then select **Update existing records**.



**Note:** Even though the **Add new and update existing records** option appears, you can't use it to add new person accounts to campaigns.

3. For Match Lead by, select **Salesforce.com ID**.
4. Select **Assign person accounts to campaigns**.
5. Select the CSV file that contains your import data, and click **Next**.
6. Map column headers from your CSV file to these fields.
  - Salesforce ID of the contact associated with the person account
  - Email
7. Click **Next**.
8. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

SEE ALSO:

[Importing Campaign Members](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To add person accounts that you own to a campaign via the Data Import Wizard:

- Create on accounts

AND

Edit on accounts

AND

Import Personal Contacts

To add person accounts owned by others to a campaign via the Data Import Wizard:

- Create on accounts

AND

Edit on accounts and contacts

AND

Modify All Data



## Create Contacts and Add Them to a Campaign with the Data Import Wizard

### USER PERMISSIONS

To create contacts that you own and add them to a campaign via the Data Import Wizard:

**Marketing User** selected in your user information

AND

Create on accounts

AND

Read on contacts

AND

Edit on accounts and campaigns

AND

Import Personal Contacts

To create contacts owned by others and add them to a campaign via the Data Import Wizard:

**Marketing User** selected in your user information

AND

Create on accounts

AND

Read on contacts

AND

Edit on accounts, contacts, and campaigns

AND

Modify All Data

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

With a single import file, you can create multiple contacts at once and make them members of a campaign.

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Account: Account Name
- Contact: Email
- Contact: Last Name
- Contact: First Name (optional but recommended)



**Tip:** To obtain values that are already in your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

1. From the campaign detail page, select **Manage Members > Add Members - Import File**.  
The Data Import Wizard appears.
2. Select **Accounts and Contacts**, then select **Add new and update existing records**.
3. Set Match Contact by to **Email**.
4. Set Match Account by to **Account Name and Account Site**.

5. Select **Assign contacts to campaigns**.
6. Select the CSV file that contains your import data, and click **Next**.
7. Map column headers from your CSV file to these fields.
  - Account: Account Name
  - Contact: Email
  - Contact: Last Name
  - Contact: First Name (optional but recommended)
8. Click **Next**.
9. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

SEE ALSO:

[Importing Campaign Members](#)

## Create Leads and Add Them to a Campaign with the Data Import Wizard

To add multiple leads as members of a campaign, launch the Data Import Wizard from the campaign detail page.

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Email
- Company
- Last Name
- First Name (optional but recommended)



**Tip:** To obtain values that are already in your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

1. From the campaign detail page, select **Manage Members > Add Members - Import File**. The Data Import Wizard appears.
2. Select **Leads**, then select **Add new and update existing records**.
3. Set **Match Lead by** to **Email**.
4. Select **Assign leads to campaigns**.
5. Select the CSV file that contains your import data, and click **Next**.
6. Map column headers from your CSV file to these fields.
  - Email
  - Company
  - Last Name
  - First Name (optional but recommended)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To create leads and add them to a campaign via the Data Import Wizard:

- **Marketing User** selected in your user information
- AND
- Edit on campaigns
- AND
- Import Leads

7. Click **Next**.

8. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

SEE ALSO:

[Importing Campaign Members](#)

## Campaign Fields

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

Field	Description
Active	Checkbox to mark whether the campaign is active or not.
Actual Cost	Amount of money spent to run the campaign.
Budgeted Cost	Amount of money budgeted for the campaign.
Campaign Currency	The default currency for currency amount fields in the campaign. Amounts display in the campaign currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.
Campaign Member Type	Record type for campaign members; determines the page layout of the members of the campaign.
Campaign Name	Identifying name for the campaign.
Campaign Owner	Assigned owner of the campaign.
Campaign Record Type	Record type for the campaign; determines the picklist values available for the campaign.
Converted Leads in Campaign	Number of leads that were converted to accounts due to the marketing efforts in the campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. For more information on converting leads, see <a href="#">Convert Qualified Leads</a> on page 211. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
Created By	User who created the campaign including creation date and time. (Read only)
Custom Links	Listing of custom links for campaigns as set up by your administrator.
Description	Description of the campaign. Up to 32KB of data are allowed in this field. Only the first 255 characters display in reports.
End Date	Ending date for the campaign. Responses received after this date are still counted.
Expected Response (%)	Percentage of responses you expect to receive for the campaign.
Expected Revenue	Amount of money you expect to generate from the campaign.
Last Modified By	User who last changed the campaign fields, including modification date and time. This does not track changes made to any of the related list items on the campaign. (Read only)
Opportunities in Campaign	Calculated field for number of opportunities associated with the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Num Sent	Number of individuals targeted by the campaign. For example, the number of emails sent.
Won Opportunities in Campaign	Calculated field for number of closed/won opportunities associated with the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Parent Campaign	The campaign above the selected campaign in the campaign hierarchy.
Start Date	Starting date for the campaign.
Status	Status of the campaign, for example, Planned, In Progress. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Total Actual Cost in Hierarchy	Calculated field for the total amount of money spent to run a campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or

Field	Description
	approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Budgeted Cost in Hierarchy	Calculated field for the total amount of money budgeted for a campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Contacts in Campaign	Number of individuals on accounts that are associated with the campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Contacts in Hierarchy	Calculated field for number of contacts associated with the campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Converted Leads in Hierarchy	Calculated field for the total number of leads associated with the campaign hierarchy that were converted into accounts, contacts, and opportunities. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Expected Revenue in Hierarchy	Calculated field for the total amount of money you expect to generate from a campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Leads in Campaign	Number of potential opportunities (leads) associated with the campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it

Field	Description
	can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Leads in Hierarchy	Calculated field for the total number of leads associated with the campaign hierarchy. This number also includes converted leads. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Num Sent in Hierarchy	Calculated field for the total number of individuals targeted by a campaign hierarchy, for example, the number of emails sent. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Opportunities in Hierarchy	Calculated field for the total number of opportunities associated with the campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Responses in Campaign	Calculated field for the total number of contacts and unconverted leads that have a <code>Member Status</code> equivalent to "Responded" for the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Responses in Hierarchy	Calculated field for number of contacts and unconverted leads that have a <code>Member Status</code> equivalent to "Responded" for the campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Value Opportunities in Campaign	Calculated field for the amount of all opportunities associated with the campaign, including closed/won opportunities. (Read only)

Field	Description
	<p>Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.</p> <p>For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency and displays in parentheses.</p> <p>For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount displays in parentheses.</p> <p>This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.</p>
Total Value Opportunities in Hierarchy	<p>Calculated field for total amount of all opportunities associated with the campaign hierarchy, including closed/won opportunities. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.</p> <p>All campaigns in a hierarchy must use the same currency.</p> <p>For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency and displays in parentheses.</p> <p>For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount displays in parentheses.</p>
Value Won Opportunities in Campaign	<p>Calculated field for amount of all closed/won opportunities associated with the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.</p> <p>For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency.</p> <p>For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match</p>

Field	Description
	<p>your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount displays in parentheses.</p> <p>This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.</p>
Total Value Won Opportunities in Hierarchy	<p>Calculated field for amount of all closed/won opportunities associated with the campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.</p> <p>All campaigns in a hierarchy must use the same currency.</p> <p>For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency.</p> <p>For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount displays in parentheses.</p> <p>This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.</p>
Total Won Opportunities in Hierarchy	<p>Calculated field for the total number of won opportunities associated with the campaign hierarchy. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.</p>
Type	<p>Type of campaign, for example, Direct Mail or Referral Program. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.</p>



## Sharing Campaigns

Your administrator defines your organization's sharing model for campaign access. However, you can extend sharing privileges for your own campaigns individually. Use campaign sharing to *increase* access to your campaigns; you cannot restrict access beyond your organization's default access levels.

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

- To show a filtered list of items, select a predefined list from the **View** drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the **View** drop-down list and click **Edit**.
- To grant access to the record for other users, groups, roles, or territories, click **Add**.
- Click **Expand List** to view all users that have access to the record.
- For manual sharing rules that you created, click **Edit** or **Del** next to an item in the list to edit or delete the access level.

## Special Considerations

- To share a campaign, you must have Public Full Access to the campaign and have the **Marketing User** checkbox selected in your personal information.
- The **Sharing** button is available depending on your organization-wide default for campaigns.
- Make sure you are sharing records with users who have the appropriate "Read" object permission for viewing the shared records.
- Sharing a campaign does not automatically grant read access to all the campaign members. Make sure that the user you are sharing a campaign with has visibility to the associated leads or contacts.
- The campaign hierarchy statistic fields provide aggregate data for a parent campaign and all the campaigns below it in the hierarchy, regardless of whether a user has sharing rights to a particular campaign within the hierarchy. Therefore, consider your organization's campaign sharing settings when enabling campaign hierarchy statistics. If you do not want users to see aggregate hierarchy data, remove any or all of the campaign hierarchy statistic fields from the [Campaign Hierarchy](#) related list. These fields will still be available for reporting purposes.

### SEE ALSO:

[View Campaign Hierarchies](#)

[Viewing Campaign Hierarchy Statistics](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view campaigns:

- Read on campaigns

To share campaigns:

- Read on campaigns

AND

**Marketing User** checked in your user information

## Add Multiple Contacts and Leads to Campaigns

Quickly add lots of contacts, leads, and person accounts as members to your campaigns at one time while in accessibility mode.

1. From a campaign, click **Manage Members**.
2. Click either **Add Members - Existing Contacts** or **Add Members - Existing Leads**.
3. In the first step of the wizard, choose a campaign member status value to assign to the new members.
4. Click **Next**.
5. Select the records you want to add as campaign members.

### SEE ALSO:

[Add Multiple Members to a Campaign from a List View](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To add multiple contacts, leads, and person accounts to campaigns:

- Marketing User in your user information
- AND
- Edit on campaigns
- AND
- Read on contacts, leads, and person accounts

## Delete Multiple Contacts and Leads from Campaigns

Save time by removing lots of campaign members from campaigns at a time while in accessibility mode.

1. From a campaign, click **Manage Members**.
2. Click either **Remove Members - Existing Contacts** or **Remove Members - Existing Leads**.
3. Choose the campaign members that you want to remove from the campaign.
4. When you are finished removing members from your campaign, click **Done** to exit the wizard.

SEE ALSO:

[Add Multiple Contacts and Leads to Campaigns](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To delete multiple existing contacts and leads from campaigns:

- Marketing User checked in your user information
- AND
- Edit on campaigns and leads
- AND
- Read on contacts

## Track the Opportunities Your Campaigns Bring In

Track how your campaigns contribute to your opportunities.

IN THIS SECTION:

[Customizable Campaign Influence](#)

Customizable Campaign Influence lets you 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.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Customizable Campaign Influence

Customizable Campaign Influence lets you 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 [Campaign Influence 1.0](#).

### IN THIS SECTION:

#### [Add Influential Campaigns to an Opportunity](#)

Manage lists of campaigns that influence your opportunities directly on opportunity detail pages.

#### [View Campaign Results by Campaign](#)

Understand the return on investment for a campaign by seeing the opportunities influenced by a campaign and the total revenue represented by those opportunities.

#### [View Campaign Results by Account](#)

Understand how marketing is impacting the pipeline within a given account. See the opportunities on an account and the campaigns that influenced them using the Campaign Influence related list.

#### [Report on Campaign Results](#)

Get a better understanding of your campaigns' return on investment by creating custom report types that combine campaign influence with Opportunities, Campaigns, Contacts, and Accounts.

### EDITIONS

This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app.


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

## Add Influential Campaigns to an Opportunity

Manage lists of campaigns that influence your opportunities directly on opportunity detail pages.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

Consider these details before adding influential campaigns to your opportunities.

- If your business uses the Primary Campaign Source influence model, you can't add influential campaigns manually to opportunities. Campaigns are automatically added to opportunities based on the rules your admin defines.
  - If your business uses another campaign influence model and your admin has allowed it, you can add influential campaigns to opportunities yourself.
1. View the detail page of an opportunity.
  2. Click **New** in the Campaign Influence related list.
  3. In the Campaign name field, enter a campaign name or click  to search for a campaign.
  4. If you are using the Primary Campaign Source influence model and you want to designate the campaign as the primary campaign, select **Primary Campaign Source**.
  5. Click **Save**.

## View Campaign Results by Campaign

Understand the return on investment for a campaign by seeing the opportunities influenced by a campaign and the total revenue represented by those opportunities.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

When you view a campaign detail page, the Influenced Opportunities (1) related list displays the opportunities generated by the campaign. The opportunities displayed are based on the default campaign influence model designated by your admin.

### EDITIONS

This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app.

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

### USER PERMISSIONS

To view the campaign influence related list:

- Read on Campaigns and Opportunities

To manually add or update influential campaigns:

- Read on Campaigns
- AND
- Read and Edit on Opportunities
- AND
- Marketing User selected in user details

### EDITIONS

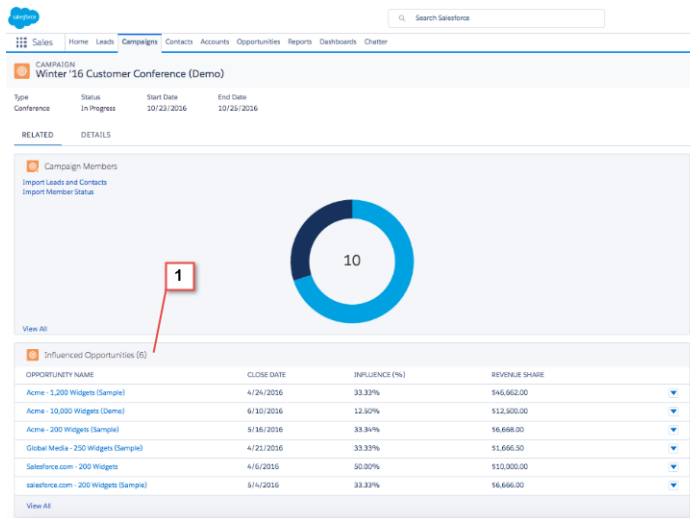
This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app.

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

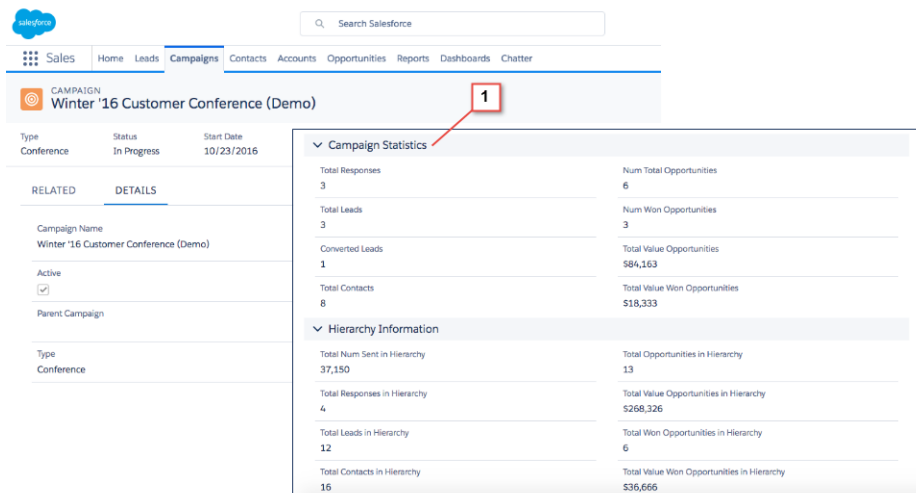
### USER PERMISSIONS

To view campaign details:

- Read on Campaigns



The Campaign Statistics section (1) of the campaign detail page displays a summary of the opportunities generated by the campaign, including the number of opportunities, the total revenue from those opportunities, and the total revenue from won opportunities.

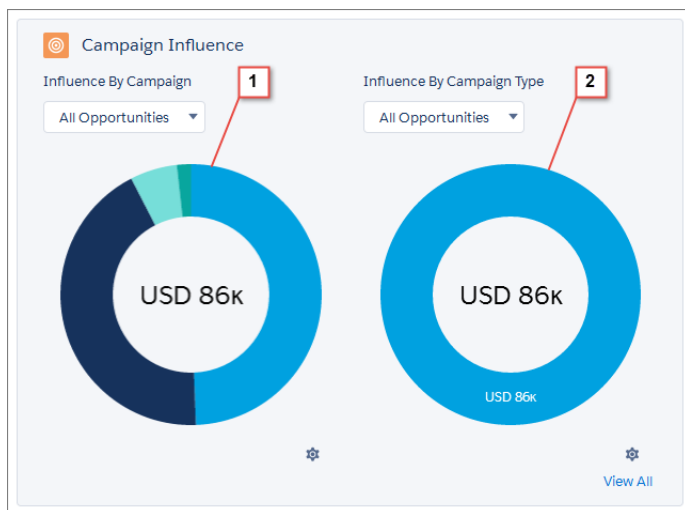


## View Campaign Results by Account

Understand how marketing is impacting the pipeline within a given account. See the opportunities on an account and the campaigns that influenced them using the Campaign Influence related list.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

When you view an account detail page, the Campaign Influence related list shows the opportunities on the account. The list also shows the share of revenue from each opportunity influenced by specific campaigns. A pair of charts shows the revenue influenced by each campaign (1), and the share influenced by each campaign type (2).



To filter the opportunities represented, use the menus above each chart. To see the full list of influenced opportunities along with the share of revenue attributed to each campaign, click **View All**.

The opportunities displayed are based on the default campaign influence model designated by your admin. The Influence by Campaign chart shows results from up to 1000 of your campaigns with the highest revenue shares. This chart combines campaign influence records from deleted campaigns into a separate amount. The Influence by Campaign Type chart shows results from up to 1000 of your campaign types with the highest revenue shares. It's important that each of your campaigns has a unique name so that these charts can be calculated correctly.

If you don't see the Campaign Influence related list, contact your admin. In Salesforce1, campaign influence records appear without the charts.

### EDITIONS

This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app.

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

### USER PERMISSIONS

To view campaign details:

- Read on Campaigns

To view Campaign Influence related list:

- Read on Opportunities

AND

Read access to the Account field on related opportunities

To view campaign influence records:

- Read access to related campaigns, opportunities, and accounts

To view Campaign Influence charts:

- Read access to Type field on campaigns

## Report on Campaign Results

Get a better understanding of your campaigns' return on investment by creating custom report types that combine campaign influence with Opportunities, Campaigns, Contacts, and Accounts.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

Here are some examples of the custom report types that you can create to see how your campaigns are doing.

- Campaigns with Influenced Opportunities—reports which campaigns drove the most opportunities and had the best return on investment.
- Opportunities with Campaign Influence—reports how much your campaigns influenced your opportunities. Create a separate report for each influence model and add them to a dashboard so you can compare the results in each model.
- Contacts or Accounts with Campaign Influence—reports which contacts or accounts were influenced by campaigns.

## 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 [Campaign Influence 1.0](#) and not to [Customizable Campaign Influence](#).

### IN THIS SECTION:

#### [Add Influential Campaigns to Opportunities](#)

Manage lists of campaigns that influence your opportunities directly on opportunity detail pages.

### EDITIONS

This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce1 mobile app.

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

### USER PERMISSIONS

To create or update custom report types:

- Manage Custom Report Types

To delete custom report types:

- Modify All Data

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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



## Add Influential Campaigns to Opportunities

Manage lists of campaigns that influence your opportunities directly on opportunity detail pages.



**Note:** This information applies only to [Campaign Influence 1.0](#) and not to [Customizable Campaign Influence](#).

Consider these details before adding influential campaigns to your opportunities.

- Though multiple campaigns can be influential, you can designate only one campaign as the primary campaign source on the opportunity.
- The campaign you designate as the primary campaign source will always appear in the Campaign Influence related list.
- The opportunities fields of the campaign statistics section on a campaign detail page will populate for only the campaign you designate as the primary campaign source. For example, you have an email campaign and a telemarketing campaign that both influence the same opportunity, and you designate the email campaign as the primary campaign source. The campaign statistics opportunities fields will populate for only the email campaign.
- When you select **Primary Campaign Source**, the **Primary Campaign Source** field on the opportunity detail page updates with the name of the primary campaign. It's possible that workflow and Apex rules on opportunities can be triggered by this change.
- When you add campaigns using **Add Campaign** in the Campaign Influence related list, campaign member details don't appear in the related list.

Let's now add influential campaigns from the Campaign Influence related list.

1. View the detail page of an opportunity.
2. Click **Add Campaign** in the Campaign Influence related list.
3. Enter a campaign name in the **Campaign name** field or click to search for a campaign.
4. If you want to designate the campaign as the primary campaign, select **Primary Campaign Source**.
5. Click **Save**.

You can also configure filter criteria that, when met, will automatically add influential campaigns to opportunities. For example, you can configure a filter to add only email and telemarketing campaigns.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view the campaign influence related list:

- Read on campaigns
- AND
- Read on opportunities

To manually add influential campaigns:

- Read on campaigns
- AND
- Read and Edit on opportunities

## Planning, Managing, and Tracking Campaigns FAQs

### Campaigns FAQ

- [Can I use mass email for my email campaigns?](#)
- [How can I track which opportunities resulted from campaigns?](#)
- [How can I calculate the ROI for my campaigns?](#)
- [How do I add contacts and leads to campaigns?](#)
- [How is Campaign influence different from ROI reports?](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

- [Who has access to campaigns?](#)

SEE ALSO:

[Campaigns](#)

## Can I use mass email for my email campaigns?

Mass email is designed for small-scale sales and support mailings, not for marketing purposes. We recommend that you use Salesforce Marketing Cloud or a third-party application in the [AppExchange](#) that allows you to centrally manage email campaigns and track responses.

SEE ALSO:

[Campaigns FAQ](#)

## How do I add contacts and leads to campaigns?

Your company's campaigns typically target existing customers (contacts) and prospective customers (leads). You can associate contacts and leads with campaigns as campaign members.

- To add an individual contact or lead to a campaign, click **Add to Campaign** on the contact or lead record, and then select a campaign.
- To add multiple contacts or leads to a campaign, use these tables to find the steps recommended for the source of contact or lead information that you're using.

Contact Source	Steps for Adding Contacts to Campaigns	Maximum Number of Records You Can Add
A report of existing contacts	<a href="#">Add Campaign Members from Standard and Custom Reports</a>	50,000 per report
A .csv file of existing contacts	<a href="#">Add Existing Contacts to a Campaign with the Data Import Wizard</a>	50,000 per import file
A .csv file of new contacts	<a href="#">Create Contacts and Add Them to a Campaign with the Data Import Wizard</a>	50,000 per import file
A list view of existing contacts	<a href="#">Add Multiple Members to a Campaign from a List View</a>	250 per list page
The Contacts related list on an Account	<a href="#">Add Members to Campaigns from Accounts</a>	200 per list page

Lead Source	Steps for Adding Leads to Campaigns	Maximum Number of Records You Can Add
A report of existing leads	<a href="#">Add Campaign Members from Standard and Custom Reports</a>	50,000 per report
A .csv file of existing leads	<a href="#">Add Existing Leads to a Campaign with the Data Import Wizard</a>	50,000 per import file
A .csv file of new leads	<a href="#">Create Leads and Add Them to a Campaign with the Data Import Wizard</a>	50,000 per import file

Lead Source	Steps for Adding Leads to Campaigns	Maximum Number of Records You Can Add
A list view of existing leads	<a href="#">Add Multiple Members to a Campaign from a List View</a>	250 per list page

SEE ALSO:

[Campaigns FAQ](#)

## How can I calculate the ROI for my campaigns?

The Campaign ROI Analysis Report is located on the Reports tab in the Campaign Reports folder. It calculates your campaigns' performance by return on investment (ROI) and average cost. For each campaign in the report:

- ROI, which is expressed as a percentage, is calculated as the net gain (Value Won Opportunities in Campaign - Actual Cost) divided by the Actual Cost.
- Value Won Opportunities in Campaign is the calculated amount of all closed or won opportunities where the campaign is the Primary Campaign Source on the opportunity.

SEE ALSO:

[Campaigns FAQ](#)

## How can I track which opportunities resulted from campaigns?

One key benefit of campaigns is the ability to track how much business has been generated from each campaign. When you create an opportunity, you can fill in the `Primary Campaign Source` field to indicate that the opportunity resulted from a specific campaign.

In addition, when you convert a lead that is linked to a campaign, that campaign is automatically inserted into the opportunity `Primary Campaign Source` field.

If a lead or contact is linked to multiple campaigns, the campaign with which he or she is most recently associated is inserted into the opportunity `Primary Campaign Source` field.

The Opportunities related list on a campaign shows every opportunity that is linked to that campaign. You can also run the Campaign Revenue Report to track which opportunities are linked to your campaigns.

SEE ALSO:

[Campaigns FAQ](#)

## How is Campaign influence different from ROI reports?

Campaign influence tracks pipeline and revenue for multiple campaigns, and ties all campaigns of a contact role to that opportunity for pipeline and ROI reporting. This is especially helpful for longer deal cycles when more than one campaign contributes to a closed deal or a converted lead.

SEE ALSO:

[Campaigns FAQ](#)

## Who has access to campaigns?

Depending on your sharing settings, users in your org can view campaigns, view the advanced campaign setup, or run campaign reports. However, only designated marketing users with the appropriate user permissions can create, edit, and delete campaigns and configure advanced campaign setup. An administrator must select the **Marketing User** option on a user's personal information to designate that user as a marketing user.

In addition, marketing users with the appropriate user permissions can use the Data Import Wizard to add contacts, leads, and person accounts as campaign members. They can also use the Data Import Wizard to update the statuses of campaign members.

SEE ALSO:

[Campaigns FAQ](#)

## Explore Your Salesforce Org's Territory Model

A territory model includes a hierarchy and a list view of parent and child territories. If you manage, administer, or belong to a sales territory, you should explore your territory model to understand how Sales efforts are organized. Drill down to get important details on individual territories, including assigned accounts.



**Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From Setup, enter *Territory Models* in the **Quick Find** box, then select **Territory Models**. The list view displays your org's active territory model. Click the model's label if you want to view its detail page. Along with other details, this page tells you the last time account assignment rules were run to realign the territory.
2. From the list view, click the model's **View Hierarchy** link.
3. Click **Tree View** to expand and explore the hierarchy tree.
4. Within the hierarchy, click a territory label to view its detail page, where you can identify its territory type, assigned users and their access levels, assignment rules, and more.
5. From the top of the page, navigate back to the model's territory hierarchy and check out its other territories.

### EDITIONS

Available in: **Salesforce Classic**

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

### USER PERMISSIONS

To view an active territory model:

- **View Setup and Configuration**

## Identify an Account's Sales Territories

Find out which Sales territory an account belongs to.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Open the account record.
2. View the account's territories on the Territory Assignments related list.

SEE ALSO:

[View a List of the Accounts in Your Territories](#)

## View a List of the Accounts in Your Territories

Create a list view that shows you which accounts are assigned to the territories you cover.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

The **My Territories** filter shows accounts that belong to the territories you're assigned to. The **My Territory Teams** filter shows accounts for territories you're assigned to *and their descendant territories* (if any).

1. Click the Accounts tab and click **Edit** next to the view menu.
2. Give the view a name, then specify *My Territories* or *My Territory Teams* in the filter criteria. Add other filters if you need them.
3. Choose other fields you want to filter on, then select *Account Name* and any other fields you want the list view to show.
4. Click **Save**.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To identify an account's sales territory:

- Read on accounts

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view territories in all of your organization's territory models:

- Manage Territories

To view territories in your organization's *Active* territory model:

- View Setup and Configuration


To view accounts:

- Read on Accounts


# Managing Accounts by Territory

## Territory Management

Territory management is an account sharing system that grants access to accounts based on the characteristics of the accounts. It enables your company to structure your Salesforce data and users the same way you structure your sales territories.


 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management. Original Territory Management is available only with [Customizable Forecasts](#) and is not supported with [Collaborative Forecasts](#). If original Territory Management is enabled, you can no longer use Collaborative Forecasts. The newer Enterprise Territory Management can't be used with [Customizable Forecasts](#). Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

Particularly if your organization has a private sharing model, you may need to grant users access to accounts based on criteria such as postal code, industry, revenue, or a custom field that is relevant to your business. You may also need to generate forecasts for these diverse categories of accounts. Territory management solves these business needs and provides a powerful solution for structuring your users, accounts, and their associated contacts, opportunities, and cases.

 **Note:** Account ownership and its effect on record sharing remains valid and unchanged when territory management is in use.

Key benefits of territory management include:

- The ability to use account criteria to expand a private sharing model.
- Support for complex and frequently changed sales organization structures.
- Support for transferring users between territories, with the option to retain opportunities.
- Multiple forecasts per user, based on territory membership.
- Territory-based sales reports.

 **Note:** Territory management only affects accounts and the standard objects that have a master-detail relationship to accounts. For example, opportunities are included in territory management but leads are not.

## What Is a Territory?

A territory is a flexible collection of accounts and users where the users have at least read access to the accounts, regardless of who owns the account. By configuring territory settings, users in a territory can be granted read, read/write, or owner-like access (that is, the ability to view, edit, transfer, and delete records) to the accounts in that territory. Both accounts and users can exist in multiple territories. You can manually add accounts to territories, or you can define account assignment rules that assign accounts to territories for you.

You can also control users' access to the opportunities and cases associated with the accounts in the territory, regardless of who owns the records.

## What Is a Territory Hierarchy?

Territories exist in a hierarchy which you can set up with as many nested levels as you wish. For example, you could create a top-level territory named "Worldwide Sales" that has the child territories "North America," "Europe/Middle East," "Latin America," "Africa," and "Asia/Australia." "North America" might have the child territories "Canada" and "United States." "United States" might have the child

### EDITIONS

Available in: Salesforce Classic

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

territories “Western,” “Central,” “Southern,” and “Eastern.” Finally, “Western” might have the child territories “California,” “Oregon,” “Washington,” “Nevada,” “Arizona,” and “Utah.”

Territory hierarchies do not have to be focused on geography; they can be defined however you like.

## How Do Territories Affect Forecasting?

When you enable territory management for your organization, the territory hierarchy also becomes the forecast hierarchy. Your forecast data is derived from the opportunities that are associated with the accounts in your territories. Users have a different forecast for each territory to which they are assigned. For example, if you are assigned to both “California” and “Arizona,” you have a separate forecast for the opportunities you have in each of these territories.” See [Viewing Customizable Forecasts](#) on page 347.

### SEE ALSO:

[Managing Territories](#)

[Territory Management FAQ](#)

## Managing Territories



**Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Managing your organization’s territories involves the following tasks:

- Organize territories into hierarchies that represent your organization’s forecasting requirements and how users work in your organization.
- Configure organization-wide settings for territory management.
- Create new territories and edit existing territories.
- Assign users to territories.
- Define account assignment rules that evaluate accounts and assign them to territories.
- Select accounts from lists and manually assign them to territories.

### SEE ALSO:

[Territory Management](#)

[Territory Management FAQ](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To manage territories:

- Manage Territories

OR

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

## Assigning Opportunities to Territories

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

An opportunity can be assigned to a territory when the opportunity is created—either manually or during lead conversion—or when account assignment rules run that affect existing opportunities. This topic includes the following sections:

- [Territory Assignment for Manually Created Opportunities](#)
- [Territory Assignment for Converted Leads](#)
- [Notes About Territory Assignment for Opportunities](#)

### Territory Assignment for Manually Created Opportunities

When an opportunity is created from the Opportunities tab or from the Quick Create area on the sidebar, Salesforce compares the territories associated with the opportunity's account to the territories that the opportunity owner is a member of:

- If there is a single territory that both the account and the opportunity owner belong to, the opportunity is assigned to that territory if "Evaluate this account against territory rules on save" is selected.
- If more than one territory is common to both the account and the opportunity owner, the opportunity is not automatically assigned to any territory. The opportunity owner must manually assign a territory to the opportunity.
- If no territory is common to both the account and the opportunity owner, the opportunity owner cannot assign the opportunity to a territory.

### Territory Assignment for Converted Leads

When a lead is converted to an opportunity, that opportunity's territory assignment depends on several factors, including:

- Whether the account associated with the opportunity is assigned to one or more territories
- Whether the lead owner is a member of the same territory as the account
- The number of users assigned to a territory
- Whether a forecast manager is assigned to the territory

If the account associated with the opportunity is assigned to only one territory, use the following table to determine how the opportunity's territory is assigned:

Lead Owner Belongs to Same Territory as Account	Number of Users Assigned to Territory	A Forecast Manager is Assigned to the Territory	Results
Yes	1	N/A	The opportunity is assigned to the same territory as the account and the lead owner becomes the opportunity owner.
No	1	N/A	The opportunity is assigned to the same territory as the account and the opportunity owner is the sole member of the territory.

#### 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 opportunities:

- **Create on Opportunities**



Lead Owner Belongs to Same Territory as Account	Number of Users Assigned to Territory	A Forecast Manager is Assigned to the Territory	Results
No	0	N/A	The opportunity is assigned to the same territory as the account and the lead owner becomes the opportunity owner. The lead owner is added as an inactive member of the territory.
Yes	>1	Yes	The opportunity is assigned to the same territory as the account and the forecast manager becomes the opportunity owner.
Yes	>1	No	The opportunity is assigned to the same territory as the account and the lead owner becomes the opportunity owner.
No	>1	Yes	The opportunity is assigned to the forecast manager of the territory.
No	>1	No	The opportunity is assigned to the same territory as the account and the lead owner becomes the opportunity owner. The lead owner is added as an inactive member of the territory.

If the account associated with the opportunity is assigned to more than one territory, use the following table to determine how the opportunity's territory is assigned:


Lead Owner's Territory Membership	Results
Lead owner has one territory in common with the account	The opportunity is not assigned to any territories and the lead owner becomes the opportunity owner. The opportunity owner can assign the opportunity to the account's territory.
Lead owner has more than one territory in common with the account	The opportunity is not assigned to any territories and the lead owner becomes the opportunity owner. The opportunity owner can assign the opportunity to any territory that he or she has in common with the account.
Lead owner has no territories in common with the account	The opportunity is not assigned to any territories and the lead owner becomes the opportunity owner. The opportunity owner cannot assign the opportunity to any territories.

## Notes About Territory Assignment for Opportunities

- The following actions do not change an opportunity's territory:
  - Manually assigning the opportunity's account to a territory

- Changing which account is associated with the opportunity
  - Changing the account's territory as a result of account assignment rules if the opportunity and its account are in different territories
  - Transferring the opportunity to a new owner
- Territory assignment rules do not update an opportunity if the opportunity's `Close Date` is before the current date and the opportunity's `Stage` is `Closed Won` or `Closed Lost`.
  - When an opportunity is not automatically assigned to a territory, we recommend that users be notified if the opportunity is not assigned to a territory manually within one day. You can set up time-based workflow to notify users about unassigned opportunities.
  - Restoring an account or opportunity from the Recycle Bin restores the territory assignment, but it does not trigger the evaluation of account assignment rules. If account assignment rules changed while the record was in the Recycle Bin, the restored record may have territories that are inconsistent with the new rules.
  - When opportunities are transferred from one user to another, whether individually or as a group, the territory assignment on the opportunities is unaffected. However, if the opportunities are assigned to a user who is not already a member of the opportunity's territory, that user is added as an inactive member of the territory.
  - When users are removed from a territory, you can specify who should receive their open opportunities. Also, when users are transferred from one territory to another, you can specify which opportunities the users should continue to own and select a recipient for any remaining opportunities. If you do not specify a recipient:
    - If the parent territory has a forecast manager, the forecast manager takes ownership of the user's open opportunities. The forecast manager is assigned to the territory and `Active in Territory` is unchecked.
    - If the parent territory does not have a forecast manager, the user remains in the territory and `Active in Territory` is unchecked.

## View Manually Assigned Accounts Lists

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

The manually assigned accounts list page displays a list of accounts assigned to the selected territory. From this page, you can view detailed account information, remove accounts from territories, and access other related information.

- To show a filtered list of items, select a predefined list from the **View** drop-down list, or click **Create New View** to define your own custom views.
- Click an account name to view the account detail.
- Click **Remove** next to an account name to remove the account from the territory.

SEE ALSO:

[Territory Management](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view manually assigned account lists:

- View Setup and Configuration

To remove accounts:

- Manage Territories

AND


Edit on accounts

OR

You are a forecast manager, Forecast managers can manage territories is selected, you are working below your position in the territory hierarchy, and you have Edit on accounts.

## Managing Accounts by Territory FAQs

### Territory Management FAQ

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

- [How does Salesforce handle territory management?](#)
- [Are opportunities transferred to different users when account assignment rules are run?](#)
- [Are the territory hierarchy and the role hierarchy different?](#)
- [How are opportunities assigned to territories?](#)
- [How do manually assigned accounts differ from those assigned by account assignment rules?](#)
- [How does opportunity confinement work?](#)
- [Must I be assigned to the same territories as the opportunities I own?](#)

### EDITIONS

Available in: Salesforce Classic

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

- [What happens when I undelete an account or opportunity that was assigned to a territory?](#)
- [What kinds of records have territories?](#)
- [When do account assignment rules evaluate accounts?](#)

SEE ALSO:

[Territory Management](#)

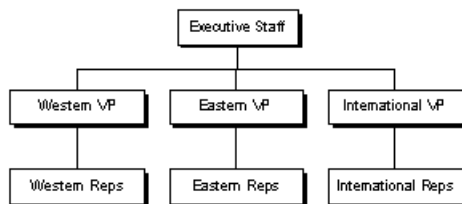
## How does Salesforce handle territory management?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.


In Developer and Performance Edition orgs, and in Enterprise and Unlimited Edition orgs with the Sales Cloud, you can enable Territory Management to organize your users into territories and provide access to accounts and their related opportunities and cases.

In Professional Edition orgs, Salesforce's role hierarchy allows you to manage the roll-up of information among your company's territories. The hierarchy structure is not based on traditional titles, but rather on a hierarchy of roles. Multiple people with different titles can be assigned to the same role. Users always have access to the data that is owned by or shared with users assigned to roles below them in the hierarchy. A user's role also determines which data is accessible to him or her in forecasts.

A typical org may have three levels of roles, for example:



- The top role may include your VPs of sales, marketing, and client services, and your CFO. These users will be able to view all information at lower levels and perform roll-ups on that information.
- The middle level may include various vice president or regional managers. These roles can access the data owned by or shared with all users below them in the hierarchy. For example, the Western VP role can view and perform roll-ups of the information owned by users in the Western Reps role.
- Since no roles are below the various Reps roles, the users in those roles cannot perform any roll-ups or view anyone's information except their own.

 **Note:** Your role hierarchy interacts with your org's sharing model to determine exactly what information a user can see, given the sharing setting is selected to use hierarchies. For forecasts, a user's role always determines which information he or she can view, regardless of the sharing model. Likewise, in a Private sharing model, a user's role determines his or her access to other users' data. However, in a Public Read/Write or Public Read Only org, users can view (and edit, for Public Read/Write) information of all other users, in addition to having access to the data of users below them in the hierarchy.

SEE ALSO:


[Territory Management FAQ](#)

[Territory Management](#)

### EDITIONS

Territory Management  
available in: **Salesforce  
Classic**

## Are opportunities transferred to different users when account assignment rules are run?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

When account assignment rules cause an opportunity to be reassigned to a territory to which you already belong, you automatically become the owner of that opportunity when you meet any of the following criteria:

- You are the only member of the territory.
- You are the only forecast manager in the territory.
- You are the only territory member enabled for forecasting.

If none of these criteria are met, the original opportunity owner is added to the territory as an inactive member.

SEE ALSO:

[Territory Management FAQ](#)

## Are the territory hierarchy and the role hierarchy different?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Yes. The territory hierarchy and the role hierarchy are independent. See the following comparison:

<b>Territory Hierarchy</b>	<b>Role Hierarchy</b>
Is available by contacting Salesforce	Is available by default
Determines forecasts	Has no impact on forecasting when territory management is enabled
Supports assigning a user to multiple territories	Supports assigning a user to only one role
Affects account and opportunity reports	Affects all other reports
Grants access to records regardless of ownership. Users receive whatever access is most permissive across both hierarchies.	Grants access to records based on ownership. Users receive whatever access is most permissive across both hierarchies.

SEE ALSO:

[Territory Management FAQ](#)

## How are opportunities assigned to territories?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Opportunities are automatically assigned to territories based on the following actions.


- Creating a new opportunity
- Running account assignment rules

When account assignment rules are run, opportunities are automatically assigned to the same territory as the account when:

- An opportunity does not have a territory and its account is added to a territory.
- An account moves from one territory to another. However, if an account assignment rule prohibits opportunities from moving outside a given part of the territory hierarchy, the opportunities do not move and no longer belong to any territories.

Opportunities are not automatically assigned to the same territory as the account when:

- An account is removed from a territory and not reassigned to a new territory in the same operation. The account's opportunities from the original territory no longer belong to any territories.
- An account is reassigned to multiple territories in one operation. The account's opportunities from the original territory no longer belong to any territories, unless the `Confine Opportunity Assignment` checkbox is checked.

 **Note:** If the opportunity owner is not part of the new territory, he or she is added as an inactive member of the territory.


The following actions do not change an opportunity's territory.

- Manually assigning the opportunity's account to a territory
- Changing which account is associated with the opportunity
- Changing the account's territory as a result of account assignment rules if the opportunity and its account are in different territories
- Transferring the opportunity to a new owner.

SEE ALSO:

[Territory Management FAQ](#)

## How do manually assigned accounts differ from those assigned by account assignment rules?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Manually assigned accounts are not evaluated when running account assignment rules. After they have been manually assigned to a territory, they remain there until they are manually removed from the territory.

SEE ALSO:

[Territory Management FAQ](#)

## How does opportunity confinement work?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

If the `Confine Opportunity Assignment` checkbox is selected for a territory, the territory's opportunities remain in the territory or its child territories when you run account assignment rules. The following exceptions apply:

- If an opportunity's account moves to only one of the territory's children, then the opportunity follows the account and is reassigned to the account's new territory. This includes when an account moves to multiple territories and only one of the new territories is a child of the original territory.
- If an opportunity's account moves to more than one of the territory's children, then the opportunity's territory field is set to blank.
- If an opportunity's account moves completely out of the territory and its children, then the opportunity's territory field is set to blank.

SEE ALSO:

[Territory Management FAQ](#)

## Must I be assigned to the same territories as the opportunities I own?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

When an open opportunity is assigned to you and you do not belong to that opportunity's territory, you are assigned to the territory with `Active in Territory` unchecked in the Assigned Users related list of the territory.

SEE ALSO:

[Territory Management FAQ](#)

## What happens when I undelete an account or opportunity that was assigned to a territory?



**Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Undeleting an account or opportunity restores the territory assignment, but does not trigger the evaluation of account assignment rules. If account assignment rules changed while the record was in the Recycle Bin, the restored record may have territories that are not consistent with the new rules.

SEE ALSO:

[Territory Management FAQ](#)

## What kinds of records have territories?



**Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Accounts, opportunities, and users have territory fields. Accounts and users can be associated with multiple territories. An opportunity can be associated with only one territory.

SEE ALSO:

[Territory Management FAQ](#)

## When do account assignment rules evaluate accounts?



**Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Active account assignment rules automatically evaluate accounts and assign them to territories when:

- An account is created using the Salesforce user interface, the Force.com API 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.

SEE ALSO:

[Territory Management FAQ](#)

## Tracking Potential Opportunities as Leads

### Leads

Track prospects apart from your contacts and opportunities with Salesforce lead records. After you've qualified your lead records, convert them to contacts and create accounts for them (if you don't already have the accounts in Salesforce). And hopefully, create opportunities to bolster your pipeline.

Regardless of whether you're working in Lightning Experience or Salesforce Classic, you work with a list of leads. From the list, you quickly create, locate, and work with the leads you're focusing on at the moment.

Associate relevant events and tasks with those leads. And convert your qualified leads to contacts that have opportunities associated to them. For any lead records that you mark Unqualified, plan to revisit them later to see whether those prospects' needs for your products and services changed.

SEE ALSO:

[Convert Qualified Leads](#)

### Guidelines for Creating Leads

Get some guidance when you manually create leads to track your prospects.

- From the Leads tab, you can automatically assign the lead using the active lead assignment rule. To do so, select `Assign using active assignment rules`. Otherwise, the lead belongs to you.

If you automatically assign the new lead, the record type of the lead can change, depending on the behavior your admin specified for assignment rules.

- If your sales team uses divisions (Salesforce Classic only), the division of a new lead is automatically set to your default division, unless you manually select a different one.
- Your admin determines the default lead status for new leads.
- The lead is marked Read and doesn't appear in the My Unread Leads list view. In Salesforce Classic, if you click **Save & New**, the lead is marked Unread.

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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




# Leads Home

Clicking on the Leads tab displays the leads home page.

- In the **Lead Views** section, select a list view from the drop-down list to go directly to that list page, or click **Create New View** to define your own custom view.

To view the leads in a queue, choose that queue list from the drop-down list. For every queue your administrator creates, Salesforce adds a corresponding queue list view.

 **Note:** The org-wide sharing model for an object determines the access users have to that object’s records in queues:

### Public Read/Write/Transfer

Users can view and take ownership of records from any queue.

### Public Read/Write or Public Read Only

Users can view any queue but only take ownership of records from queues of which they are a member or, depending on sharing settings, if they are higher in the role or territory hierarchy than a queue member.

### Private

Users can only view and accept records from queues of which they are a member or, depending on sharing settings, if they are higher in the role or territory hierarchy than a queue member.

Regardless of the sharing model, users must have the “Edit” permission to take ownership of records in queues of which they are a member. Salesforce admins, users with the “Modify All” object-level permission for Cases or Leads, and users with the “Modify All Data” permission, can view and take records from any Case or Lead queue regardless of their membership in the queue.

- In the **Recent Leads** section, select an item from the drop-down list to display a brief list of the top leads matching that criteria. From the list, you can click any lead name to go directly to the lead detail. Toggle the **Show 25 items** and **Show 10 items** links to change the number of items that display. The fields you see are determined by the “Leads Tab” search layout defined by your administrator and by your field-level security settings (available in Professional, Enterprise, Unlimited, Performance, and Developer Editions). The Recent Leads choices are:

Recent Leads Choice	Description
My Unread Leads	The last ten or twenty-five leads assigned to you which you have not yet viewed or edited. This list only includes records owned by you.
Recently Viewed	The last ten or twenty-five leads you viewed, with the most recently viewed lead listed first. This list is derived from your recent items and includes records owned by you and other users.
Recently Created	The last ten or twenty-five leads you created, with the most recently created lead listed first. This list only includes records owned by you.

- If Quick Create has been enabled by your administrator, you can add a new lead from the **Quick Create** area in the sidebar on the leads homepage. Alternatively, click **New** next to the **Recent Leads** section to create a new lead.

## EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## USER PERMISSIONS

To view Leads tab:

- Read on leads

To view leads:

- Read on leads

To create leads:

- Create on leads

- Under **Reports**, click any report name to jump to that report.
- In the **Summary** section, choose values and click **Run Report** to view a summary list of your leads.
- Select any of the links under **Tools** to manage your leads.
- If leads are shared with external contacts via Salesforce to Salesforce, choose one of the list views under **Leads from Connections** to view leads that your business partners have shared with you.

SEE ALSO:

[Leads](#)

## Reassign Leads from a Queue

Accepting leads from a queue is an easy way to reassign leads to yourself.

1. Go to a list view that shows a lead queue. If you don't see a lead queue, ask your admin to add you as queue member.
2. Select the leads you want to own.
3. Click **Accept**.

To reassign a single lead from a queue, go to the record detail page and change the record owner.

SEE ALSO:

[Change a Record's Owner](#)  
[Leads](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To change or accept ownership of leads from a queue:

- Edit on leads

## Lead Fields

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


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

Field	Description	Accepts Data.com or D&B Value
Address	Street address for the lead, for example, 475 Boardwalk Ave. Up to 255 characters are allowed in this field.	✔ (Data.com)
Annual Revenue	Amount of annual revenue at lead's company.	✔ (D&B)
Campaign	Name of the campaign responsible for generating the lead. Displays only when creating a new lead.	



### EDITIONS


Available in: Salesforce Classic and Lightning Experience

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

Field	Description	Accepts Data.com or D&B Value
	Data entered in this field is stored in the Campaign History related list on the lead.	
City	City portion of the lead's address, for example, San Francisco. Up to 40 characters are allowed in this field.	✓ (Data.com)
Clean Status	The record's clean status, as compared with Data.com. Values are Not Compared, In Sync, Reviewed, Different, Not Found, and Inactive. This field is available if you use Data.com Prospector or Data.com Clean.	✓ (Data.com)
Company	Name of company with which lead is affiliated. Up to 255 characters are allowed in this field.	✓ (D&B)
Company D-U-N-S Number	<p>Data Universal Numbering System (D-U-N-S) number is a unique, nine-digit number assigned to every business location in the D&amp;B database that has a unique, separate, and distinct operation. D-U-N-S numbers are used by industries and organizations around the world as a global standard for business identification and tracking. This field is available if you use Data.com Prospector or Data.com Clean.</p> <p> <b>Note:</b> To see the entire D-U-N-S number, either</p> <ul style="list-style-type: none"> <li>• Add the lead to Salesforce if you haven't yet, or</li> <li>• Clean the lead with Data.com if it already exists in Salesforce</li> </ul> <p>Until you add or clean the record, its first five digits will be masked with asterisks (*).</p>	✓ (D&B)
Company Name (Local)	Name of the company in the local language.	
Country	Country portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	
Created By	User who created the lead, including creation date and time. (Read only)	
D&B Company	A link to the corresponding D&B Company record, which displays Dun & Bradstreet (D&B) fields for the lead. Use the lookup if you need to associate a different D&B Company record with the lead. This field is only available to organizations that use Data.com Prospector or Data.com Clean.	✓ (D&B)
Data.com Key	The company's ID in Data.com. When Salesforce records are compared with Data.com records (via manual cleaning or automated clean jobs), if Data.com finds a match, the two records are linked by this field's numeric value.	✓ (Data.com)
Description	Description of the lead. Up to 32KB of data are allowed in this field. Only the first 255 characters appear in reports.	

Field	Description	Accepts Data.com or D&B Value
Do Not Call	Whether the contact wants to be contacted by phone. If you use Data.com, the <code>Phone</code> field value is hidden from search results and on the Contact Card, and it's blank in <code>.csv</code> files that are created when you export records.	
Email	Email address of lead. Must be a valid email address in the form: <code>jsmith@acme.com</code> . Up to 80 characters are allowed in this field.  Click the email address in this field to send an email using your personal email application. If the Gmail Buttons and Links feature is enabled, you can click the Gmail link next to the field to send an email from your Gmail account. See Gmail™ in Salesforce for more information.	✔ (Data.com)
Email Opt Out	Whether the contact wants to receive email. If you use Data.com, the <code>Email</code> field value is hidden from search results and on the Contact Card, and it's blank in <code>.csv</code> files that are created when you export records.	
Fax	Lead's fax number. Up to 40 characters are allowed in this field.	
Fax Opt Out	Lead has not requested to be included in broadcast faxes.	
First Name	First name of the lead, as displayed on the lead edit page. Up to 40 characters are allowed in this field.	✔ (Data.com)
First Name (Local)	First name of the lead translated into the local language.	
Industry	Primary business of lead's company. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	✔ (Data.com)
Last Name	Last name of the lead, as displayed on the lead edit page. Up to 80 characters are allowed in this field.	✔ (Data.com)
Last Name (Local)	Last name of the lead translated into the local language.	
Last Transfer Date	The date the lead owner was last changed.	
Lead Currency	The default currency for all currency amount fields in the lead. Amounts display in the lead currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.	
Lead Division	Division to which the lead belongs. Available only in organizations that use divisions to segment their data.	
Lead Owner	Assigned owner of the lead.	
Lead Record Type	Name of the field that determines what picklist values are available for the record. The record type may be associated with a lead process. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.	

Field	Description	Accepts Data.com or D&B Value
Lead Source	Source of lead, for example, Advertisement, Partner, or Web. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	✔ (Data.com)
Lead Status	Status of the lead, for example, Open, Contacted, Qualified. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Middle Name	Middle name of the lead, as displayed on the lead edit page. Up to 40 characters are allowed for this field.   <b>Note:</b> To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User Interface</i> in the Quick Find box, then select <b>User Interface</b> . Then select <b>Enable Name Suffixes for Person Names</b> .	
Middle Name (Local)	Middle name of the lead translated into the local language.   <b>Note:</b> To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User Interface</i> in the Quick Find box, then select <b>User Interface</b> . Then select <b>Enable Name Suffixes for Person Names</b> .	
Mobile	Cellular or mobile phone number. Up to 40 characters are allowed in this field.	
Modified By	User who last changed the lead fields, including modification date and time. This does not track changes made to any of the related list items on the lead. (Read only)	
Name	Combined first name, middle name (beta), last name, and suffix (beta) of lead, as displayed on lead detail page.	✔ (Data.com)
No. of Employees	Number of employees at the lead's company.	✔ (D&B)
Phone	Lead's primary phone number. Up to 40 characters are allowed in this field.	✔ (Data.com)
Partner Account	Read-only field that indicates the lead is owned by a partner user.	
Rating	Indicates value or prospect of the lead, for example, Hot, Warm, Cold. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Read	Flag indicating that the lead has been viewed or edited by the lead owner. Flag is not displayed on lead edit or detail pages. Leads marked as "Read" do not contain a check mark in the Unread column on leads list views.	
Salutation	Title for addressing the lead, for example, Mr., Ms., Dr., or Prof. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	

Field	Description	Accepts Data.com or D&B Value
State/Province	State or province portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	
Suffix	<p>Name suffix of the lead, as displayed on the lead edit page. Up to 40 characters are allowed for this field.</p> <p> <b>Note:</b> To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User Interface</i> in the <i>Quick Find</i> box, then select <b>User Interface</b>. Then select <i>Enable Name Suffixes for Person Names</i>.</p>	
Title	Position of lead within his or her company. Up to 80 characters are allowed in this field.	✔ (Data.com)
Unread	Flag indicating that the lead has not been viewed or edited by the lead owner. Flag is not displayed on lead edit or detail pages. Leads marked as "Unread" contain a check mark in the Unread column on leads list views.	
Custom Links	Listing of custom links for leads as set up by your administrator.	
Website	URL of company's website, for example, www.acme.com. Up to 255 characters are allowed in this field; only the first 50 are displayed.	
ZIP	ZIP code or postal code portion of the lead's address. Up to 20 characters are allowed in this field.	✔ (Data.com)

## SEE ALSO:

[Lead Conversion Mapping](#)

## Convert Qualified Leads

Keep the sales process moving when you qualify a lead and then convert it to a contact. Relate that contact to either an existing account in Salesforce, or an account that you create. And if the lead you're converting results in a deal that looks promising, create an opportunity record at the same time.

Keep in mind that you can't reverse lead conversion. When you convert leads to contacts or accounts, the process sometimes creates duplicate records. If so, we show you a warning (custom warnings set up by your administrator do not appear during lead conversion). How these duplicate records are handled depends on how your administrator has set up Apex Lead Convert and Duplicate Management. For example, your administrator can require that you resolve the duplicates before you finish converting.

Once converted, a lead record is no longer searchable, unless your admin has assigned you the "View and Edit Converted Leads" permission. The new account, contact, or opportunity record created from the converted lead is searchable. In Lightning Experience, both the converted lead record and the new record based on the converted lead are searchable. However, you can't view or edit the converted lead record from the search results page.

1. In a lead record, choose to convert the lead.
2. Select an account, or enter a name for an account that you're creating.
3. *Salesforce Classic only:* If you update a person account, select the option to overwrite the lead source in the person account with the value from the lead.
4. If you create an opportunity record, give it a name.
5. Convert the lead.

SEE ALSO:

[Considerations for Converting Leads](#)

[Lead Conversion Mapping](#)

## Considerations for Converting Leads

Learn what happens to qualified leads when you convert them to accounts, contacts, and opportunities.

When you convert qualified leads, Salesforce moves any campaign members to the new contacts. The leads become read-only records, unless your administrator gives you permission to edit them. If existing accounts and contacts share the names specified on the leads, you can choose to update the existing accounts and contacts. Salesforce adds information from the lead into empty fields; Salesforce does not overwrite existing account and contact data.

All open and closed activities from the leads are attached to the accounts, contacts, and opportunities. You can assign the owners of these new records, and schedule follow-up tasks. When you assign new owners, only the open activities are assigned to the new owner. If you have custom lead fields, that information can be inserted into custom account, contact, or opportunity fields.

Your admin can also set up your custom lead fields to populate custom account, contact, and opportunity fields automatically. You can't view converted leads, unless your admin has assigned you the "View and Edit Converted Leads" permission. However, converted leads do appear in lead reports. Salesforce updates the `Last Modified Date` and `Last Modified By` system fields on converted leads when picklist values included on converted leads are changed.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To convert leads:

- Create and Edit on leads, accounts, contacts, and opportunities

AND

Convert Leads

To avoid creating duplicate records when converting leads:

- Require Validation for Converted Leads

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Campaigns	<p>If the lead matches an existing contact and both records are linked to the same campaign, the campaign member status is determined by whichever is further along in the lifecycle of the campaign. For example, if the lead member status is “sent” and the contact member status is “responded,” the responded value is applied to the contact.</p> <p>Related campaign information is always associated with the new contact record, regardless of the user's sharing access to the campaign.</p> <p>When more than one campaign is associated with a lead, the most recently associated campaign is applied to the <code>Primary Campaign Source</code> field on the opportunity, regardless of the user's sharing access to the campaign.</p>
Chatter	<p>When you convert a lead to an existing account, you don't automatically follow that account. However, when you convert the lead to a new account, you automatically follow the new account, unless you disabled feed tracking for accounts in your Chatter settings.</p>
Data.com / D&B Company	<p>If you use Data.com Premium, when you add a lead from Data.com, a corresponding D&amp;B Company record (if one exists in Data.com) is automatically created in Salesforce and linked to the lead record via its <code>D&amp;B Company</code> field. If you later convert that lead:</p> <ul style="list-style-type: none"> <li>• And if the account is created from the conversion, the lead's <code>Company D-U-N-S Number</code> field value transfers to the account's <code>D-U-N-S Number</code> field, and the lead's <code>D&amp;B Company</code> field value transfers to the account's <code>D&amp;B Company</code> field.</li> <li>• Its <code>Data.com Key</code> field value transfers to the contact's <code>Data.com Key</code> field.</li> </ul> <p>If you use Data.com Corporate, no D&amp;B Company record is created, but the lead's <code>Data.com Key</code> field value transfers to the contact's <code>Data.com Key</code> field.</p>
Divisions	<p>The new account, contact, and opportunity are assigned to the same division as the lead. If you update an existing account during lead conversion, the account's division is not changed, and the new contact and opportunity inherit the account's division.</p>
Duplicate Management	<p>When you convert leads to contacts or accounts, the process sometimes creates duplicate records. If so, we show you a warning (custom warnings set up by your administrator do not appear during lead conversion). How these duplicate records are handled depends on how your administrator has set up Apex Lead Convert and Duplicate Management. For example, your administrator can require that you resolve the duplicates before you finish converting.</p>
Enterprise Territory Management	<p>Filter-based opportunity territory assignment is not triggered when an opportunity is created through lead conversion.</p>
New Accounts and Contacts	<p>When <i>new</i> accounts or contacts are created during lead conversion, the values of mapped lead fields <i>overwrite</i> the default values of the mapped account and contact fields.</p>
Existing Accounts and Contacts	<p>When updating <i>existing</i> accounts or contacts during lead conversion, the values of mapped lead fields <i>do not</i> overwrite the values of the mapped account and contact fields.</p>
Local Lead Names	<p><code>Company Name (Local)</code> on the lead automatically maps to <code>Account Name (Local)</code>, along with their associated standard name fields.</p>



Person Accounts	<p>With person accounts enabled, you can convert leads to either person accounts or business accounts. Leads that don't have a value in the <code>Company</code> field are converted to person accounts. Leads that do have a value in the <code>Company</code> field are converted to business account.</p> <p>We recommend that you use different lead record types and page layouts to differentiate leads that convert to person accounts from those that convert to business accounts. Specifically, remove the <code>Company</code> field from the page layouts for leads that convert to person accounts. Then, make the <code>Company</code> field required on the page layouts for leads that convert to business accounts.</p> <p>If you convert a lead and attach it to a person account that someone else owns, that person account owner becomes the contact owner.</p> <p>If you convert a lead that someone else owns and attach it to a person account that you own, the lead owner becomes the contact owner.</p>
Record Types	<p>If the lead has a record type, the default record type of the user converting the lead is assigned to records created during lead conversion.</p> <p>The default record type of the user converting the lead determines the lead source values available during conversion. If the desired lead source values are not available, add the values to the default record type of the user converting the lead.</p>
Salesforce to Salesforce	<p>When you convert a lead, Salesforce to Salesforce inactivates the shared record and updates the External Sharing related list in your connection's lead record with an Inactive (converted) status. Due to inactivation of the shared record, changes to the Lead Status during conversion aren't reflected in your connection's lead record.</p>
Search	<p>Once converted, a lead record is no longer searchable in Salesforce Classic. However, the new account, contact, or opportunity record created from the converted lead is searchable. In Lightning Experience, both the converted lead record and the new record based on the converted lead are searchable; however, you can't access the converted lead record to view or edit from the search results page.</p>
Standard and Custom Lead Fields	<p>The system automatically maps standard lead fields to standard account, contact, and opportunity fields.</p> <p>For custom lead fields, your administrator can specify how they map to custom account, contact, and opportunity fields.</p> <p>The system assigns the default picklist values for the account, contact, and opportunity when mapping standard lead picklist fields that are blank. If your organization uses record types, blank values are replaced with the default picklist values of the new record owner.</p>
Territory Management	<p>If your organization uses territory management, account assignment rules evaluate the new account and can assign it to one or more territories. If the rules assign the account to exactly one territory, then the opportunity is also assigned to that territory. If the rules assign the account to multiple territories, then the opportunity is not assigned to any territory.</p>
Apex Triggers	<p>During lead conversion, triggers fire. Universally required custom fields and validation rules are enforced.</p> <p>When updating a lead, triggers that cause the lead to convert can cause a warning. The warning tells the user that the lead is no longer accessible to them. The lead is inaccessible because it has been converted to a contact. Refer to the new contact instead.</p> <p>If the <code>Require Validation for Converted Leads</code> checkbox on the Lead Settings page is deselected, Salesforce ignores lookup filters when converting leads.</p>

**Workflow**

You can't convert a lead that's associated with an active approval process or has pending workflow actions. Converting a lead to a person account won't trigger workflow rules.

When a lead is converted by someone who isn't the lead owner, all workflow tasks associated with the lead that are assigned to that user, except email alerts, are reassigned to the lead owner. Workflow tasks assigned to users other than the lead owner and lead converter aren't changed.

If validation and triggers for lead convert are enabled, then converting a lead can trigger a workflow action on a lead. For example, if there's an active workflow rule that either updates a lead field or transfers the owner of a lead, that rule can trigger when the lead is converted, even if the lead isn't visible on the Leads tab as a result of the conversion. Allow the workflow process to finish before updating lead fields, otherwise save or lead convert fails. If a workflow rule creates a task as a result of a lead conversion, the task is assigned to the newly created contact and related to the associated account or opportunity.

When you convert a lead, files and related records attached to the lead are attached to the resulting contact, account, and opportunity records. Items from the following related lists on leads are carried over to the new or existing contact, account, and opportunity during lead conversion.

<b>Lead Related List</b>	<b>Contact</b>	<b>Account</b>	<b>Person Account</b>	<b>Opportunity</b>
Open Activities	✓✓	✓✓	✓✓	✓✓
Activity History	✓✓	✓✓	✓✓	✓✓
Campaign History	✓✓		✓✓	
HTML Email Status	✓✓		✓✓	
Notes and Attachments	✓✓		✓✓	
Files	✓✓	✓✓	✓✓	✓✓
Notes (new)	✓✓	✓✓	✓✓	
Content Deliveries	✓✓			
Social Posts	✓✓		✓✓	
Social Personas	✓✓		✓✓	
Marketing Actions	✓✓		✓✓	

SEE ALSO:

[Convert Qualified Leads](#)

## Lead Conversion Mapping

Learn how lead fields convert to contact, account, person account, and opportunity fields when you convert a lead.

When you convert lead records, standard lead fields map to contact, account, person account, and opportunity fields. If you use custom fields, your admin specifies the fields that they map to in your newly created records.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Lead Field	Maps to
Address	Account: Billing Address Person Account: Mailing Address and Billing Address Contact: Mailing Address
Annual Revenue	Account: Annual Revenue Person Account: Annual Revenue
Campaign	Opportunity: Primary Campaign Source  This field shows the campaign associated with a lead before conversion. The campaign provides 100% of the amount revenue credit to the specified campaign. For leads associated with multiple campaigns, Salesforce adds the most recently associated campaign to the opportunity, even if the sales rep can't access that campaign.
City	Account: Billing City Person Account: Mailing City and Billing City
Company	Account: Account Name Contact: Account Opportunity: Opportunity Name and Account Name
Company Name (Local)	Account: Account Name (Local)
Country	Account: Billing Country Person Account: Mailing Country and Billing Country
Country Code	Account: Billing Country Code Person Account: Mailing Country Code and Billing Country Code
Description	Contact: Description
Do Not Call	Contact: Do Not Call  This field is not updated for leads converted to existing contacts. Person Account: Do Not Call

Lead Field	Maps to
Email	Contact: Email Person Account: Email
Email Opt Out	Contact: Email Opt Out This field is not updated for leads converted to existing contacts. Person Account: Email Opt Out
Fax	Account: Fax Person Account: Fax Contact: Fax
Fax Opt Out	Contact: Fax Opt Out Person Account: Fax Opt Out
First Name	Contact: First Name Person Account: First Name
First Name (Local)	Contact: First Name (Local) Person Account: First Name (Local)
Industry	Account: Industry Person Account: Industry
Informal Name	Person Account: Informal Name
Last Name	Contact: Last Name Person Account: Last Name
Last Name (Local)	Contact: Last Name (Local) Person Account: Last Name (Local)
Latitude	Account: Billing Latitude Person Account: Mailing Latitude and Billing Latitude
Lead Owner	Account: Owner Contact: Owner Opportunity: Owner
Lead Source	Contact: Lead Source Opportunity: Lead Source Person Account: Lead Source

Lead Field	Maps to
Longitude	Account: Billing Longitude Person Account: Mailing Longitude and Billing Longitude
Middle Name	Person Account: Middle Name
Mobile	Contact: Mobile Person Account: Mobile
No. of Employees	Account: Employees Person Account: Employees
Partner Account	Opportunity: Partner Account This field is not updated for leads converted to existing opportunities.
Phone	Account: Phone Person Account: Phone Contact: Phone
Postal Code	Account: Billing Postal Code Person Account: Mailing Postal Code and Billing Postal Code
Rating	Account: Rating Person Account: Rating
Salutation	Person Account: Salutation
State	Account: Billing State Person Account: Mailing State and Billing State
State Code	Account: Billing State Code Person Account: Mailing State Code and Billing State Code
Street	Account: Billing Street Person Account: Mailing Street
Suffix	Person Account: Suffix
Title	Contact: Title Person Account: Title
Website	Account: Website Person Account: Website

## Opportunity Close Dates

During the lead conversion process, Salesforce automatically assigns close dates for the opportunities you create depending on the fiscal year settings in Salesforce.

If the fiscal year in Salesforce is	Salesforce assigns close dates for opportunities to
Standard	The last day of the current fiscal quarter.
Custom	The last day of the current fiscal period. If a fiscal year has not been defined for the current date, the close date is the end of the current calendar quarter.

### SEE ALSO:

[Convert Qualified Leads](#)

[Considerations for Converting Leads](#)

## Lead Sharing in Salesforce Classic

Extend sharing privileges beyond the basic sharing model for your own data on a lead-by-lead basis.

Your administrator defines the sharing model for your company. And if that sharing model for leads is Private or Public Read Only, you can use lead sharing to increase access to your leads. You cannot, however, restrict access beyond your company's default access levels.

You can see sharing details when you click **Sharing** on the lead detail page.

### SEE ALSO:

[Leads](#)

### EDITIONS

Available in: Salesforce Classic

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

## Merge Duplicate Leads

Identify key field differences across multiple records and merge the best information from the top three records.

### IN THIS SECTION:

[Considerations for Merging Duplicate Leads](#)

Keep these considerations in mind when you merge duplicate lead records.

[Merge Duplicate Leads in Lightning Experience](#)

Work only the prospects that matter by merging duplicate records.

[Merge Duplicate Leads in Salesforce Classic](#)

Work only the prospects that matter by merging duplicate records.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Considerations for Merging Duplicate Leads

Keep these considerations in mind when you merge duplicate lead records.

- When duplicate leads that are members of different campaigns are merged, Salesforce retains the campaign `Member Status Updated` date for each campaign the merged lead is a member of.
- When duplicate records are related to items such as campaigns or activities, Salesforce relates the items to the merged record, with some exceptions. Chatter feeds are retained from the master record only. Attachments in Chatter feeds are retained in Salesforce but aren't associated with the merged record. To associate the dropped files with the merged record, find them in Files home (in Lightning Experience) or the Files tab (in Salesforce Classic). Then add them to the Files related list on the merged record.
- Salesforce retains any data in hidden or read-only fields, such as sharing settings, from the master record. Hidden fields aren't shown while you merge. A merged record retains the `Created By` user and `Created Date` from the oldest record merged, regardless of which record is the master. The record shows the merge date as the `Last Modified By` date.
- In all requested meetings, the master record replaces the duplicate records. Also, all meeting messages written by the duplicate records are automatically associated with the master. (Meeting messages appear on the requested meeting's Web page and are visible to all invitees.)
- In all scheduled meetings, the master record replaces the duplicate records. However, you must add the new master record to the meeting invitee list in the scheduled meeting.

SEE ALSO:

[Merge Duplicate Leads in Salesforce Classic](#)

## Merge Duplicate Leads in Lightning Experience

Work only the prospects that matter by merging duplicate records.

1. Choose a lead record. If duplicates exist, they're listed in a Potential Duplicates related list. Or click the **View Duplicates** link that appears on the lead.
2. Choose up to three lead records to merge. Click **Continue**.
3. Choose one lead record as the master.
4. Choose the field values that you want to keep.
5. Confirm that you want to merge the records by clicking **Next**, and then click **Merge Leads**.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### EDITIONS

Available in: Lightning Experience

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

### USER PERMISSIONS

To view leads:

- Read on leads

To merge leads:

- Delete on leads

## Merge Duplicate Leads in Salesforce Classic

Work only the prospects that matter by merging duplicate records.

1. Select a lead record.
2. Click **Find Duplicates**.
3. Select up to three leads in the matching leads list that you want to merge.

If you want, enter a new lead name or company and click **Search** to find another lead to merge. Salesforce performs a phrase search for matches in the `Name` and `Company` fields. It also considers an implied wildcard after any entry. Search results include matches for any fields you enter. For example, you enter *Bob Jones* who works at *Acme*. Search results include anyone named *Bob Jones* at any company and any lead with *Acme* as a company.

4. Click **Merge Leads**.
5. Select one lead as the “Master Record.” Salesforce retains any data from hidden or read-only fields in the Master Record. If you have the “Edit Read Only Fields” permission, you can select which read-only fields to retain. Hidden fields don’t appear during the merge process.
6. Select the fields that you want to retain from each record.
7. Click **Merge**.
8. Click **OK**.

### SEE ALSO:

[Considerations for Merging Duplicate Leads](#)  
[Merge Duplicate Contacts](#)  
[Merge Duplicate Accounts](#)

## Searching for Leads

1. Enter your search terms in the sidebar or header search box.
2. Click **Search**.  
If you're using local lead names, search finds matches for standard or local lead names.
3. From the search results, click an item to open it or click **Edit**, if available.

You can also create a lead list view to find leads that match specific criteria.

### SEE ALSO:

[Leads Home](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view leads:

- Read on leads

To merge leads:

- Delete on leads

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view leads:

- Read on leads



## Considerations for Deleting Leads

Know what happens to the records associated with the leads you delete.

When you delete a lead, the lead record moves to the Recycle Bin. Associated notes, attachments, and activities are deleted along with the lead. If you restore the lead, any associated notes, attachments, and activities are also restored.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

## Tracking Potential Opportunities as Leads FAQs

### Leads FAQ

- [What is a Lead?](#)
- [What are the advantages of using leads?](#)
- [Can I convert existing accounts or contacts into leads?](#)
- [How many leads can we capture from our website?](#)
- [What if my company reaches the limit for web-generated leads?](#)
- [Can I capture leads from multiple web pages?](#)
- [Can I automatically email leads that come from my website?](#)
- [How can our webmaster test the Web-to-Lead page?](#)
- [Who owns new web-generated leads?](#)
- [What status is assigned to web-generated leads?](#)
- [How can I be sure that leads won't be lost?](#)
- [How can I tell which of my leads are new?](#)
- [What happens when I convert leads?](#)
- [How are lead fields mapped to other fields during conversion?](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### What is a Lead?

Leads are people who are interested in your product and service. Converting leads to loyal customers will provide success within a business. By managing your leads in a systematic and structured way, you can increase both the numbers of leads you generate and how many leads you convert.

SEE ALSO:

[Leads FAQ](#)

### What are the advantages of using leads?

Using leads allows your company to maintain two separate lists - one for prospective customers and one for existing customers. You can store your prospects as leads, and then once a lead becomes qualified, you can convert it to an account, contact, and, optionally, an opportunity.

Leads are especially useful if your company has two separate teams - one that handles lead generation and mass marketing and one that handles sales. The lead generation team can concentrate their work on the Leads tab, and the opportunity team can use the Account, Contact, and Opportunity tabs.

SEE ALSO:

[Leads FAQ](#)

## Can I convert existing accounts or contacts into leads?

No. As an alternative, create an opportunity for the account or contact. If you prefer to use a lead, create a report containing the accounts or contacts you want to convert into leads, export them, and then import them as leads.

SEE ALSO:

[Leads FAQ](#)

## How many leads can we capture from our website?

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, you can capture up to 500 leads in a 24-hour period. If your organization exceeds its daily Web-to-Lead limit, the Default Lead Creator (specified in the Web-to-Lead setup page) receives an email containing the additional lead information. If your company regularly exceeds the Web-to-Lead limit, click **Help & Training** at the top of any page and select the My Cases tab to submit a request for a higher limit directly to Salesforce.

When your organization reaches the 24-hour limit, Salesforce stores additional requests in a pending request queue that contains both Web-to-Case and Web-to-Lead requests. The requests are submitted when the limit refreshes. The pending request queue has a limit of 50,000 combined requests. If your organization reaches the pending request limit, additional requests are rejected and not queued. Your administrator receives email notifications for the first five rejected submissions. Contact Salesforce Customer Support to change your organization's pending request limit.

SEE ALSO:

[Leads FAQ](#)

## What if my company reaches the limit for web-generated leads?

The daily limit for Web-to-Lead requests is 500. If your company generates more leads than the maximum allowed, the Default Lead Creator (specified in the Web-to-Lead setup page) will receive an email containing the captured information. Contact Customer Support if your company would like to generate over 500 Web-to-Lead requests per day.

SEE ALSO:

[Leads FAQ](#)

## Can I capture leads from multiple web pages?

Yes. Insert the generated HTML code into the web pages from which you want to capture leads. Whenever someone submits information on any of those web pages, a lead will be created.

SEE ALSO:

[Leads FAQ](#)

## How can our webmaster test the Web-to-Lead page?

Add the following line to your Web-to-Lead page code if you want to see a debugging page when you submit the form. Don't forget to remove this line before releasing the Web-to-Lead page on your website.

```
<input type="hidden" name="debug" value="1">
```

SEE ALSO:

[Leads FAQ](#)

## Who owns new web-generated leads?

Your administrator can create a lead assignment rule to determine how web leads will be automatically assigned to different users or queues. In addition, your administrator must customize the Lead Settings to specify a Default Lead Owner to whom all web leads will be assigned if the assignment rule fails to locate an owner. If you do not use assignment rules, all web leads will be assigned to the Default Lead Creator (specified in the Web-to-Lead setup).

SEE ALSO:

[Leads FAQ](#)

## What status is assigned to web-generated leads?

All new web leads are marked with a status equal to the “default status” that your administrator selects when editing the `Lead Status` picklist values. In addition, web-generated leads are marked with the “Unread” flag; they have a check mark in the Unread column on the lead list views. When a user views or edits a new web lead, the lead is automatically set to “Read.” This way you can easily locate all new leads using the My Unread Leads list view.

SEE ALSO:

[Leads FAQ](#)

## How can I be sure that leads won't be lost?

The daily limit for Web-to-Lead requests is 500. If your organization exceeds its daily Web-to-Lead limit, the Default Lead Creator (specified in the Web-to-Lead setup page) receives an email containing the additional lead information.

If a new lead cannot be generated due to errors in your Web-to-Lead setup, Customer Support is notified so that we can assist you in correcting it.

Salesforce ensures that your leads won't be lost if they are submitted during a scheduled Salesforce downtime.

SEE ALSO:

[Leads FAQ](#)

## How can I tell which of my leads are new?

When a lead is assigned to you, either manually transferred, imported, or generated from the web, the lead is marked as “Unread,” that is, it has a check mark in the Unread column on leads list views. To view your new leads, select the My Unread Leads list view on the Leads tab. When you view or edit an “Unread” lead, it is automatically marked as “Read.”

SEE ALSO:

[Leads FAQ](#)

## What happens when I convert leads?

When you convert leads, Salesforce creates accounts, contacts, and, opportunities using information from the leads you’re converting. Salesforce moves any campaign members to the new contacts, and the leads become read-only records. If existing accounts and contacts share the names specified on the leads, you can choose to update the existing accounts and contacts. Salesforce adds information from the lead into empty fields; Salesforce does not overwrite existing account and contact data.

All open and closed activities from the leads are attached to the accounts, contacts, and opportunities. You can assign the owners of these new records, and schedule follow-up tasks. When you assign new owners, only the open activities are assigned to the new owner. If you have custom lead fields, that information can be inserted into custom account, contact, or opportunity fields. Your admin can also set up your custom lead fields to populate custom account, contact, and opportunity fields automatically. You can’t view converted leads, unless your admin has assigned you the “View and Edit Converted Leads” permission. However, converted leads do appear in lead reports. Salesforce updates the `Last Modified Date` and `Last Modified By` system fields on converted leads when picklist values included on converted leads are changed.

Once converted, a lead record is no longer searchable, unless your admin has assigned you the “View and Edit Converted Leads” permission. The new account, contact, or opportunity record created from the converted lead is searchable.

SEE ALSO:

[Leads FAQ](#)

## How are lead fields mapped to other fields during conversion?

When you convert a lead, data in standard lead fields is transferred into standard account, contact, and opportunity fields. For custom lead fields, the data is mapped to custom account, contact, and opportunity fields as specified by your admin.

Any standard lead picklist fields that are blank inherit the default picklist value for accounts, contacts, and opportunities. If you use record types, all records created during lead conversion adopt the default record type for the owner of the newly created account, contact, and opportunity.

SEE ALSO:

[Lead Conversion Mapping](#)

[Leads FAQ](#)

## Can I automatically email leads that come from my website?

Yes. You can create auto-response rules to email these prospects using templates that vary based on criteria that you set up.

SEE ALSO:

[Leads FAQ](#)

## Why can't I see the **Sharing** button on a record in Salesforce Classic?

The **Sharing** button lets users grant other users access to a record beyond the organization-wide defaults or sharing rules. You can easily remove this access after it's no longer needed.

You have access to the **Sharing** button when your sharing model is either Private or Public Read Only for a type of record or related record. For example, the **Sharing** button may appear on an account even though your organization-wide default for accounts is Public Read/Write, if your organization-wide default for related opportunities is Public Read Only.

When the button is available on the page layout, administrators see the button on all records. Non-administrators see this button on records that only they own.

## Managing Activities, Opportunities, and Products

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### Track Your Products, Prices, and Payment Schedules

#### Products

Products in Salesforce represent the products and services that your company offers to customers.

##### [Products Concepts](#)

Before you use products in Salesforce, make sure that you understand the basics.

##### [Guidelines for Creating Products](#)

If you're an admin or sales operations manager, you'll create products in Salesforce to track the products and services that your company sells. After you create a product, your sales reps can add it to their quotes, opportunities, and orders. Before you get started, review a few key guidelines.

#### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Products Concepts

Before you use products in Salesforce, make sure that you understand the basics.

*Products* are the items and services that you sell to customers. Each product can exist in multiple price books with different prices.

When you view the detail page of an opportunity, quote, order, or service contract, the Products related list or the Quote Line Items related list shows the associated products for that record. Use these related lists to choose a price book for the record, add or edit products, and, for opportunities, establish or edit product schedules. For example, on a quote detail page, click **Add Line Item** on the Quote Line Items related list to select a product to list on the quote.

If products are shared with external contacts via Salesforce to Salesforce, choose one of the list views under Products from Connections to view products that your business partners have shared with you.

SEE ALSO:

- [Products](#)
- [Guidelines for Creating Products](#)

EDITIONS	
Products, price books, and quotes available in: both Salesforce Classic and Lightning Experience	Orders available in Salesforce Classic
Products, price books, and orders available in: <b>Professional, Enterprise, Performance, Unlimited,</b> and <b>Developer</b> Editions	Quotes available in: <b>Performance</b> and <b>Developer</b> Editions and in <b>Professional, Enterprise,</b> and <b>Unlimited</b> Editions with the Sales Cloud

## Guidelines for Creating Products

If you're an admin or sales operations manager, you'll create products in Salesforce to track the products and services that your company sells. After you create a product, your sales reps can add it to their quotes, opportunities, and orders. Before you get started, review a few key guidelines.

- To view and create products, you need the "Read" and "Create" permissions on products.
- To get started creating products, click **New** on the Products home page.
- You can create a product by cloning an existing product. See [Considerations for Cloning Products](#).
- To ensure fast system performance with price books, keep the number of products below 2,000,000.
- Products need a [standard active price](#) before you can add them to a price book.
- To define a payment and delivery cycle via a [product schedule](#), click **Edit** above the product detail.
- For descriptions of product fields, see [Product, Price Book, Price Book Entry, and Product Schedule Fields](#).

EDITIONS	
Products, price books, and quotes available in: both Salesforce Classic and Lightning Experience	Orders available in Salesforce Classic
Products, price books, and orders available in: <b>Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions	Quotes available in: <b>Performance and Developer</b> Editions and in <b>Professional, Enterprise, and Unlimited</b> Editions with the Sales Cloud

## Prices and Price Books

Price books track the prices of products and services that your company offers to customers.

### Price Books Concepts

Learn about price books and price book entries.

### Set and Edit Product Prices

Set and edit prices for each of your company's products and services.

### Create Custom Price Books

Create custom price books for each market segment that your sales reps sell to. Then add products to each price book with the prices that you offer each market segment. For example, if you sell to domestic and international customers at different prices, you can create two custom price books: a domestic one and an international one.

### Guidelines for Sharing Price Books

Extend access to price books to more of your sales team members through sharing in Salesforce Classic.

### Considerations for Removing Price Books

To remove price books from related lists, you can archive, deactivate, or delete the price books. Each removal option has a different result. Before you remove a price book from your related lists, determine which option best fits your business needs.

EDITIONS	
Available in: both Salesforce Classic and Lightning Experience	
Available in: <b>Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions	

[Considerations for Removing a Product from a Price Book](#)

Before you remove a product from a price book, consider a few key points.

[Considerations for Removing Products and Price Books](#)

Review a few key points before you remove a product or a price book.

## Price Books Concepts

Learn about price books and price book entries.

A *price book* is a list of products and their prices.

- The *standard price book* is the master list of all your products and their default *standard prices*. Salesforce creates the standard price book when you start creating product records. It includes all your products and their standard prices regardless of any custom price books that include those products.
- A *custom price book* is a separate list of products with custom prices, called *list prices*. Custom price books are ideal for offering products at different prices to different market segments, regions, or other subsets of your customers. Create a separate price book for each set of customers that you want to address. For example, if you have one set of prices for domestic customers and another for international customers, create a domestic price book and an international one.

A *price book entry* is a product with its price as listed in a price book. Each price book entry specifies a currency for the price.

- *Standard price book entries* are the default (standard) prices for the products and services in the standard price book. When you create a product record, Salesforce creates a standard price book entry. You can mark the standard price book entry as active or inactive, depending, for example, on whether you intend to start selling the product right away.
- *Custom price book entries* are the custom (list) prices for the products and services in your custom price books. Custom price book entries can be created only for products with active standard price book entries.
- In Lightning Experience, Product detail pages display the Standard Price related list and the Price Books related list as a single Price Books related list.
- If you customize the Price Book Entry detail page layout, no field dependencies exist for price book entry fields in the user interface. If the `Use Standard Price` checkbox is removed from the page layout, and this checkbox is selected for a price book entry, you can't edit the list price. The `List Price` field is disabled and can't be enabled on this page.

### SEE ALSO:

[Prices and Price Books](#)

[Set and Edit Product Prices](#)

#### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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



Set and Edit Product Prices

Set and edit prices for each of your company’s products and services.

[Set Product Prices in Lightning Experience](#)

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

[Set and Edit Product Prices in Salesforce Classic](#)

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

SEE ALSO:

- [Considerations for Setting Prices](#)
- [Add and Edit Products on Opportunities](#)
- [Price Books Concepts](#)

EDITIONS

Products, price books, and quotes available in: both Salesforce Classic and Lightning Experience

Orders available in: Salesforce Classic

Products, price books, and orders available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Quotes available in: **Performance and Developer** Editions and in **Professional, Enterprise, and Unlimited** Editions with the Sales Cloud

### Set Product Prices in Lightning Experience

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

#### Set Standard Prices in the Standard Price Book

1. Select a product.
2. From the product page, click **Add Standard Price** from the Price Books related list. If you've already added a standard price, click **Edit** from the Show More menu to change it.
3. Enter the new standard price in the `List Price` field.
4. To make this price available to products on opportunities, quotes, or other custom price books, select **Active**.
5. Save your changes.

The standard price is automatically associated with the product in your standard price book.

#### Set List Prices in Custom Price Books

1. Select a product.
2. On the product page, click **Add to Price Book** from the Price Books related list.
3. Choose the price book and currency for the new list price, and then click **Next**.
4. Enter the list price. Alternatively, if you want the price in the chosen price book to match the standard price, select **Use Standard Price**.
5. To make this price available to be used when adding the product to opportunities or quotes, select **Active**.
6. Save your changes.

#### Edit a Price Book Entry

Click **Edit** next to a price book record in any of these locations.

- The price book detail page, in the Products related list
- The product detail page, in the Price Books related list

For information about fields, see [Product, Price Book, Price Book Entry, and Product Schedule Fields](#).

#### EDITIONS

Products, price books, and quotes available in: both Salesforce Classic and Lightning Experience	Orders available in Salesforce Classic
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Products, price books, and orders available in: <b>Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions	Quotes available in: <b>Performance and Developer</b> Editions and <b>Professional, Enterprise, and Unlimited</b> Editions with the Sales Cloud
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#### USER PERMISSIONS

- To set prices on products:
- Edit on products
- AND
- Read on Price Books

### Set and Edit Product Prices in Salesforce Classic

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

#### Set Standard Prices

1. Select a product.

2. On the product detail page, click **Add** from the Standard Price related list.

If you’ve already added a standard price, click **Edit** to change it or **Edit All** to edit all standard prices in other currencies.

3. Enter the standard price.

4. Select **Active** to make this price available to products on opportunities, quotes, or other custom price books.

5. Save your changes.

The standard price is automatically associated with the product in your standard price book.

#### Set List Prices

1. Select a product.

2. On the product detail page, click **Edit** from the Price Books related list next to the custom price book that will contain the list price.

If you haven’t already added the product to a custom price book, click **Add to Price Book** from the Price Books related list.

3. Enter the list price. Alternatively, if both prices are the same, select **Use Standard Price**.

4. Select **Active** to make this price available to products on opportunities or quotes.

5. Save your changes.

#### Edit a Price

Click **Edit** next to a price book entry record in any of these locations.

- The price book detail page, in the Products related list
- The product detail page, in the Standard Price related list
- The product detail page, in the Price Books related list
- The price book list view

For information about fields, see [Product](#), [Price Book](#), [Price Book Entry](#), and [Product Schedule Fields](#).

EDITIONS	
Products, price books, and quotes available in: both Salesforce Classic and Lightning Experience	Orders available in Salesforce Classic
Products, price books, and orders available in: <b>Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions	Quotes available in: <b>Performance and Developer</b> Editions and <b>Professional, Enterprise, and Unlimited</b> Editions with the Sales Cloud

#### USER PERMISSIONS

- To set prices on products:
- Edit on products
- AND
- Read on Price Books

Create Custom Price Books

Create custom price books for each market segment that your sales reps sell to. Then add products to each price book with the prices that you offer each market segment. For example, if you sell to domestic and international customers at different prices, you can create two custom price books: a domestic one and an international one.

- 1. Review [considerations](#).
- 2. On the Price Books page, click **New**.
- 3. Enter a name for your price book.
- 4. If your Salesforce org uses descriptions, enter one for your price book.
- 5. Select **Active** to allow sales reps to begin adding the price book or its entries to opportunities or quotes.
- 6. If you created the custom price book from scratch, leave it empty, populate it with price book entries from another price book, or add new entries.

For information about price book fields, see [Product](#), [Price Book](#), [Price Book Entry](#), and [Product Schedule Fields](#).

SEE ALSO:  
[Price Books Concepts](#)

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience	Quotes available in: Salesforce Classic
Products and price books available in: Professional, Enterprise, Performance, Unlimited, and Developer Editions	Quotes available in: Performance and Developer Editions and Professional, Enterprise, and Unlimited Editions with the Sales Cloud

USER PERMISSIONS

- To create or clone price books:
- Create on price books
- To view price books:
- Read on products
- AND
- Read in price books

### Guidelines for Sharing Price Books

Extend access to price books to more of your sales team members through sharing in Salesforce Classic.

If you're an admin or a user with the "Edit" permission on price books, you can extend sharing of a price book to more users. However, you can't change the sharing model to make it more restrictive than the default.

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

- To show a filtered list of items, select a predefined list from the **View** drop-down list, or click **Create New View** to define your own custom views.
- To edit or delete any view that you created, select it from the **View** drop-down list, and then click **Edit**.
- To grant access to the record for other users, groups, roles, or territories, click **Add**.
- 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.

Does your sales team want to see prices on the product detail page? If your organization-wide default for price books is "No Access," you can give your entire organization "View Only" access to your standard price book.

### Considerations for Removing Price Books

To remove price books from related lists, you can archive, deactivate, or delete the price books. Each removal option has a different result. Before you remove a price book from your related lists, determine which option best fits your business needs.

- Deleting, deactivating, or archiving a custom price book doesn't affect other price books or your product lists. However, these actions can affect your opportunities and quotes. Changing associations with opportunities or quotes is sometimes required before you can remove an associated price book.
- You can deactivate the standard price book, but you can't delete or archive it.

### Considerations for Deleting Price Books

- You can't delete a price book while it's in use on opportunities or quotes. If you try to, the system creates a list of the opportunities or quotes that the price book is used on.
- When you delete a price book, you delete all entries in the price book. The deleted price book and its entries are moved to the Recycle Bin. You can restore them for up to 15 days.

### Considerations for Deactivating Price Books

- You can activate, deactivate, or reactivate price books at any time by changing the price book's properties.
- You can deactivate a price book even if it's used on an opportunity or quote.
- You can continue to manage entries in your price book while it's deactivated.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To share price books:

- Edit on price books

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience	Quotes available in: Salesforce Classic
Products and price books available in: <b>Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions	Quotes available in: <b>Performance and Developer</b> Editions and <b>Professional, Enterprise, and Unlimited</b> Editions with the Sales Cloud

Considerations for Archiving Price Books

- You can archive a price book even if it’s in use on an opportunity or quote.
- An archived price book is visible, but not accessible, in all associated records.
- Entries in archived price books don’t appear in search results.
- You can’t recover or delete an archived price book.

SEE ALSO:

[Price Books Concepts](#)  
[Products Concepts](#)

Considerations for Removing a Product from a Price Book

Before you remove a product from a price book, consider a few key points.

- If you remove a product from a price book, all related price book entries are removed.
- If you restore the product from the Recycle Bin, any related price book entries are restored with it.
- If opportunities, quotes, service contracts, or contract line items are associated with a product, you can’t remove the product.
- You can’t remove a product that’s used on an opportunity or quote. If you try to remove it, Salesforce displays a list of the opportunities and quotes. That way, you can remove the product from those opportunities and quotes and try again. If you don’t want to remove the product from all opportunities and quotes, you can deactivate (recommended) or archive the product. See [Considerations for Removing Products and Price Books](#).

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience	Quotes available in: Salesforce Classic
Products and price books available in: Professional, Enterprise, Performance, Unlimited, and Developer Editions	Quotes available in: Performance and Developer Editions and in Professional, Enterprise, and Unlimited Editions with the Sales Cloud

## Considerations for Removing Products and Price Books

Review a few key points before you remove a product or a price book.

- When you remove a product or price book, all related price book entries are removed. However, if several price books contain the same product, removing the product from one price book doesn't affect the other price books. Similarly, if you remove a price book, the products that it contained aren't removed from any other price book.
- To remove a product completely, remove it from the standard price book.
- If opportunities, quotes, service contracts, or contract line items are associated with a product, you can't remove the product.
- You can't remove a product or price book that's associated with an approval process or has a pending workflow action.
- If your product or price book is used on an opportunity, quote, or order, you have three options.
  - Deactivate it by editing it and then deselecting the `Active` field. We recommend deactivating a product or price book that's on an opportunity or quote because it will no longer be available to users. You can reactivate it later. Deactivation doesn't affect the history of an opportunity line item.
  - Remove the related product or price book from all opportunities and quotes. When you try to remove a product or price book that's used on an opportunity or quote, Salesforce displays a list of the opportunities or quotes that use it.
    - If you remove a price book, remove it from each opportunity and quote that's listed.
    - If you remove a product, remove it from each opportunity and quote that uses it.Then remove the price book or product.
  - Archive the product or price book and each related price book entry. Use this option with caution. Archived products and price books can't be recovered because they're not stored in the Recycle Bin. Archived products and price books still appear on any opportunities or quotes that contained them before they were archived.

If you archive a price book, it's still visible in the associated records but not accessible or retrievable.

### EDITIONS

Products, price books, and quotes available in: both Salesforce Classic and Lightning Experience

Products, price books, and orders available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Quotes available in: **Performance and Developer** Editions and in **Professional, Enterprise, and Unlimited** Editions with the Sales Cloud

## Product Schedules

If you're using Salesforce Classic, you can use *product schedules* to determine the payment and delivery cycles for products that are paid for or delivered over time. (If you're using Lightning Experience, you can still take advantage of product schedules by switching temporarily to Salesforce Classic.)

### Product Schedules Concepts

If you're an admin or sales operations manager, you can create default schedules for products and schedules for individual product line items on opportunities. Start by learning the basics.

### Considerations for Using Product Schedules

Consider key points and review examples before you add product schedules or establish schedules on opportunity products.

### Add and Edit Product Schedules

Add product schedules to define the payment and delivery cycles of your products.

### EDITIONS

Schedules can be established in: Salesforce Classic

Scheduled products can be added and viewed in: Salesforce Classic and Lightning Experience

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

### Establish Schedules for Products on Opportunities

After you add product schedules, use them to set up payments for product sales and realized revenue on opportunities.

## Product Schedules Concepts

If you're an admin or sales operations manager, you can create default schedules for products and schedules for individual product line items on opportunities. Start by learning the basics.

- A *quantity schedule* determines when a product is delivered.
- A *revenue schedule* determines when a product is paid for.
- A *default schedule* is associated with a specific product in a specific price book. Every time the product is added to an opportunity, the default schedule is used. You can override the default schedules on any opportunity.

You determine which types of schedules your Salesforce org can use and which types of schedules can be established for each individual product.

- A quantity schedule is suitable if your customers pay once but receive the product in increments, for example, as with an annual magazine subscription for a monthly magazine. A quantity schedule defines the dates, number of units, and number of installments for payments, shipping, or other use as determined by your company.
- A revenue schedule is suitable if your customers make regular payments but receive the product once, for example, if you sell customized products that are charged in installments but delivered once. A revenue schedule defines the dates, revenue amounts, and number of installments for payments, recognizing revenue, or other use.
- A revenue and quantity schedule is suitable if your customers receive their orders on a delivery schedule and pay for the products using a payment schedule, for example, a monthly product subscription that's paid for monthly.
- A default schedule is suitable if all your customers make product payments on the same timetable or you deliver products on a regular schedule. If you typically customize schedules, there's no advantage to creating default schedules.

### SEE ALSO:

[Product Schedules](#)

## Considerations for Using Product Schedules

Consider key points and review examples before you add product schedules or establish schedules on opportunity products.

### Considerations for Using Default Product Schedules

- If you add or change a product schedule, opportunities with that product aren't updated. If a product has a default quantity schedule and a default revenue schedule, the quantity schedule is calculated first to determine the total product revenue. Then the revenue schedule is applied to that amount.
- If you have a quote line item with a discount, and the corresponding product record has a default schedule, you can't edit the `Discount` field.
- If a product has default schedules established on the product record, the schedules are automatically created when you add the product to the opportunity. The dates of the installments begin with the date that you specified when adding the product. If you didn't specify a product date, the installment dates begin with the opportunity `Close Date`.

#### EDITIONS

Schedules can be established in: Salesforce Classic

Scheduled products can be added to opportunities and viewed in: Salesforce Classic and Lightning Experience

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

#### EDITIONS

Schedules can be established in: Salesforce Classic

Scheduled products can be added to opportunities and viewed in: Salesforce Classic and Lightning Experience

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



## Examples of Using Default Product Schedules

- **Default Revenue Schedule Only:** Your ASP company sells yearly contracts of product licenses at \$1,200 per license. When a customer buys licenses, the licenses are all “delivered” at one time, but you recognize the revenue monthly. In this case, set a revenue schedule of Schedule Type=Divide, Installment Period=Monthly, and Number of Installments=12.

With this default revenue schedule, a salesperson sells 200 licenses at a unit price of \$1,200 per license per year on an opportunity on March 15. The 200 licenses are all “delivered” on March 15. The total revenue for this product is the quantity of 200 multiplied by the unit price of \$1,200 per year, for a total yearly revenue of \$240,000. The revenue schedule divides the total revenue into monthly installments of \$20,000 on the 15th of every month for the next year.

- **Default Quantity Schedule Only:** Your medical supplies company sells a box of tongue depressors for \$10 per box. You normally have yearly contracts with hospitals to deliver boxes monthly. In this case, set a quantity schedule of Schedule Type=Repeat, Installment Period=Monthly, and Number of Installments=12.

With this default quantity schedule, a salesperson sells 1,000 boxes on an opportunity on January 1. The quantity schedule creates 12 monthly installments of 1,000 boxes each, for a total quantity of 12,000 boxes. The total revenue from this opportunity is calculated using the unit price and the total quantity, so \$120,000 is booked on January 1.

- **Default Quantity and Revenue Schedules:** Your manufacturing company sells widgets for \$10 each. You normally have yearly contracts to deliver widgets weekly, but your customers pay quarterly. In this case, set a quantity schedule of Schedule Type=Repeat, Installment Period=Weekly, and Number of Installments=52. Set a revenue schedule of Schedule Type=Divide, Installment Period=Quarterly, and Number of Installments=4.

With these default schedules, a salesperson sells 2,000 widgets on an opportunity on January 1. The quantity schedule is applied first, and it schedules 2,000 widgets to be delivered every week for a year, for a total quantity of 104,000. The total revenue is calculated using the unit price and the total quantity. The total revenue of \$1,040,000 is then divided into quarterly installments of \$260,000.

SEE ALSO:

[Add and Edit Product Schedules](#)

## Add and Edit Product Schedules

Add product schedules to define the payment and delivery cycles of your products.

1. Review [considerations and examples](#).
2. Enable the appropriate schedule types.
3. Select a product from the Products home page.
4. Click **Edit**.
5. Select the type of schedule to create: quantity, revenue, or both. Your choices are limited by your Salesforce org’s schedule settings and the schedule types that are enabled for the product.
6. Set the schedule details. See [Schedule Fields](#) for descriptions.
7. Save your changes.
8. To establish a schedule on an opportunity product, see [Establish Schedules for Products on Opportunities](#).

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To add or edit product schedules:

- Edit on products

- To edit a product schedule, click **Edit** on the product detail page.

## SEE ALSO:

[Establish Schedules for Products on Opportunities](#)

[Set and Edit Product Prices](#)

## Establish Schedules for Products on Opportunities

After you add product schedules, use them to set up payments for product sales and realized revenue on opportunities.

- Review [considerations and examples](#).
- Make sure that [product schedules have been added](#).
- Click a product name in the Products related list of an opportunity.
- Click **Establish** to create a schedule, or click **Re-Establish** to delete the old schedule and create a new one.
- Select the type of schedule to create: quantity, revenue, or both. Your choices are limited by your Salesforce org's schedule settings and the schedule types that your admin enabled for the product.
- Set the schedule details. See [Schedule Fields](#) for a description of scheduling fields.
- Save your changes.  
Salesforce displays the schedule installments.
- To edit the installments, click **Edit**.

## SEE ALSO:

[Product Schedules Concepts](#)

## EDITIONS

Available in: Salesforce Classic

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

## USER PERMISSIONS

To add or edit product schedules:

- Edit on opportunities

## Guidelines for Adding Entitlement Templates to Products

If you're an admin or sales operations manager, follow key guidelines for using the Entitlement Templates related list.

Entitlement templates are predefined terms of customer support that you can quickly add to products. For example, you can create entitlement templates for Web or phone support so that users can easily add entitlements to products offered to customers.

The Entitlement Templates related list displays a product's applicable entitlement templates. Administrators determine an Entitlement Template related list's availability and content.

- To search for entitlement templates, enter a name, or part of a name, in the text entry field, and then click **Go!**.
- To add entitlement templates to a product, click **Add Entitlement Template**, select the checkboxes next to the templates that you want to add, click **Insert Selected**, and then click **Done**.
- The actions that you can perform on the entitlement template are listed under Action. For example, click **Remove** to remove an entitlement template from the product.
- The name of the template is listed under Entitlement Template. Click to view the template's details.

## EDITIONS

Available in: Salesforce Classic

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

- The user who created the entitlement template is listed under Created By.

## Product, Price Book, Price Book Entry, and Product Schedule Fields

Products, price books, and product schedules have the following fields, listed in alphabetical order. Availability of fields depends on how Salesforce is set up.

### Product Fields

Field	Description
Active	Whether the product is ready for use in a price book, opportunity, or quote, and whether you can find the product in searches and see the product in views.
Created By	The name of the user who created the product record, including the date and time of creation.
Custom Links	A list of custom links for products from Salesforce.
Last Modified By	The name of the user who last saved the record, including the date and time of the most recent save to the record.
Product Code	The internal code or product number that you use to identify the product.
Product Currency	In multicurrency organizations, the currency that you use for the product. If the product currency differs from the user currency, currency-related fields for opportunities, 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.
Product Description	The text that distinguishes this product from other products.
Product Family	The category that you specify for the product.
Product Name	The product's name.
Quantity Scheduling Enabled	Whether the product can have a quantity schedule.
Revenue Scheduling Enabled	Whether the product can have a revenue schedule.

### EDITIONS

Products, price books, and quotes available in: both Salesforce Classic and Lightning Experience

Orders available in: Salesforce Classic

Products, price books, and orders available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Quotes available in: **Performance and Developer** Editions and in **Professional, Enterprise, and Unlimited** Editions with the Sales Cloud

## Price Book Fields

Field	Description
Active	Whether you can add the price book to an opportunity or quote.
Created By	The name of the user who created the price book, including the date and time of creation.
Description	The text that distinguishes this price book from others.
Is Standard Price Book	Whether the price book is the standard price book. A read-only checkbox.
Last Modified By	The name of the user who last saved the record, including the date and time of the most recent save to the record.
Price Book Name	The price book's title.

## Price Book Entry Fields

Field	Description
Active	Whether the price book entry (product and list price) is active and can be added to an opportunity or quote.
Created By	The name of the user who created the price book entry, including the date and time of creation.
Currency	This field is available only for Salesforce orgs with multiple currencies enabled and represents the currency to use for the price book entry (product and list price).
Last Modified By	The name of the user who last saved the price book entry record.
List Price	The price of the product within the price book, including currency.
Price Book	The price book that contains the price for this entry.
Product	The product's name.
Product Code	The internal code or product number that's used to identify the product.
Standard Price	The standard price for the product. This field is derived and doesn't exist on the underlying PricebookEntry standard object.
Use Standard Price	Whether the price book entry inherits its price from the standard price book.

## Schedule Fields

Field	Description
Schedule Type	Whether the product revenue or quantity is divided into multiple installments or repeated for each installment.
Installment Period	The interval for installments; for example, Weekly or Monthly.
Number of Installments	The number of installments in the schedule.

## Considerations for Cloning Products

If you're an admin or a sales operations manager, you can clone a product to quickly create another product with the same information and price book entries. Consider key points before you clone a product.

When you clone a product:

- Price book entries in price books that you don't have sharing access to aren't created.
- If you have read-only access to a field, the value of that field isn't carried over to the cloned record.

### EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

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

## Considerations for Creating and Maintaining Price Books

Before you create a price book, consider a few key points.

- To create a custom price book by cloning an existing price book, click **Clone** on the price book detail page.
- You can delete products from custom price books without affecting the original product listing or its entries in other price books. When you delete a product from the standard price book, the product is still available and active, but its standard price is deleted and removed from all custom price books. If you delete the product from the standard price book, and it's still associated with any custom price books, click **OK** to remove it from all custom price books.
- You can add products, quote line items, or order products from a single price book only.
- To include a product on an opportunity, quote, or order, choose a price book that contains the product. The last price book that you used on an opportunity or quote is selected by default. To select a different price book, click **Choose Price Book** in the Products related list on an opportunity or the Quote Line Items related list on a quote. Choose Price Book appears when you have access to more than one price book. If you have access to more than one price book and the option isn't visible, ask your administrator to add it to your page layout.
- If you change the price book for an opportunity that has products, all products are deleted from the Products related list, but the value in the opportunity's Amount field remains.

SEE ALSO:

[Create Custom Price Books](#)

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience	Quotes and orders available in Salesforce Classic
Products, price books, and orders available in: <b>Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions	Quotes available in: <b>Performance and Developer</b> Editions and in <b>Professional, Enterprise, and Unlimited</b> Editions with the Sales Cloud


## Considerations for Setting Prices

If you're an admin or a sales operations manager, consider key points before you set prices for your products in Salesforce.

- The following price types are available.
  - A *standard price* is the default price that you associate with a product. It's automatically included in your standard price book.
  - A *list price* is the custom price that you associate with a product in a custom price book. For example, you can maintain one set of prices for domestic orders and another for international orders.
  - *Sales prices* are the actual prices that sales reps specify for the products that they add to opportunities and quotes. Sales prices can be the same as the list prices from the price book that's used for the opportunity or quote, or they can include discounts or other modifications.
- Before you can add a new product to an opportunity, quote, or custom price book, add a standard price to the product, and mark it as active. This pricing is the default pricing of the product.
- Before you can assign list prices for products, create custom price books. List prices are available to use when you add products to an opportunity or quote from a custom price book.
- To represent the price, for example, \$100.00, enter *100* or *100.00*, with or without the \$ symbol.
- You can expand the format of your price fields to up to eight decimal places. To change your decimal place settings, contact Salesforce.

## Considerations When Using the Salesforce Classic User Interface

- You can add standard or list prices only through the multiline add pages (the Add Standard Price page and the Add List Price page). These pages don't support custom fields. To add standard or list prices and populate custom fields, add the price book entry via the multiline add pages, navigate to the Price Book Entry Edit page for the added record, and then update the custom fields.

 **Note:** This consideration doesn't affect price book entries that were created or edited by using Data Loader or the API.
- If the price book entry contains required custom fields, you can't create price book entries in the user interface. You can create these price book entries only by using Data Loader or the API.
- You can edit prices in either of the following locations.
  - The multiline edit pages (the Edit Standard Price page and the Edit List Price page)
  - The Price Book Entry Edit page

### EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience	Quotes available in: Salesforce Classic
Products and price books available in: <b>Professional, Enterprise, Performance, Unlimited, and Developer</b> Editions	Quotes available in: <b>Performance and Developer</b> Editions and in <b>Professional, Enterprise, and Unlimited</b> Editions with the Sales Cloud

# Building Your Pipeline with Opportunities

## Opportunities

Track and manage your potential deals with Salesforce opportunities.

Opportunities are deals in progress. Opportunity records track details about deals, including which accounts they're for, who the players are, and the amount of potential sales. If your organization uses leads, an opportunity is created when a lead is converted. Opportunities can also be created directly for accounts you're working. As your deals progress toward the Proposal stage:

- Add products and attach files, such as contracts or data sheets.
- Log the calls you make.
- Use Notes to jot down things during customer meetings.
- Create tasks for key activities and calendar events for client meetings.
- Send email to the opportunity contact or other key decision-makers.

During negotiation, share sales strategies with colleagues or to ask your manager for targeted guidance using Chatter. As you drive your deal from one stage to the next, update the opportunity record with the current stage. You'll be closing deals in no time.



**Tip:** To learn more about using opportunities and leads, complete the [Leads & Opportunities](#) Trailhead module.

### SEE ALSO:

[Work With Opportunities](#)

[Understand How Opportunities Work](#)

[Opportunity Fields](#)

## Work With Opportunities

Use opportunities to track and manage your pipeline so you can close deals faster. Move deals to the next stage, add products, and more.

### IN THIS SECTION:

[Move an Opportunity to the Next Stage](#)

Update your deal as it moves closer to closing. Accurate stage information is important for forecasting, reporting, and ultimately meeting your quota.

[Add and Edit Products on Opportunities](#)

Track what's selling and in what quantity by adding products to opportunities. Then make sure that you maintain accurate records by updating the quantities and prices of the products.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09



### [Schedule Reminders to Update Opportunities](#)

To ensure your team is keeping their opportunities up to date, create an automated email that contains a report of your team's open opportunities and send it to your direct reports.

SEE ALSO:

[Opportunities](#)

## Move an Opportunity to the Next Stage

Update your deal as it moves closer to closing. Accurate stage information is important for forecasting, reporting, and ultimately meeting your quota.

IN THIS SECTION:

### [Move an Opportunity to the Next Stage in Salesforce Lightning Experience](#)



Update your opportunity stage directly from its record or from the Opportunity Kanban view.

### [Move an Opportunity to the Next Stage in Salesforce Classic](#)

Track opportunity progress as you get closer to closing your deal.

## Move an Opportunity to the Next Stage in Salesforce Lightning Experience

Update your opportunity stage directly from its record or from the Opportunity Kanban view.

 **Note:** These steps work in Lightning Experience. If you see 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.

- From an open opportunity, select the new stage on the Sales Path and then click **Mark as Current**.
- From an open opportunity, click **Mark Stage as Complete**.
- From the Opportunity Kanban view, find the opportunity whose stage you want to update and drag its card to the next stage column.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

### EDITIONS

Available in: Lightning Experience

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

### USER PERMISSIONS

To create opportunities:


- Create on Opportunities

To view opportunities:

- View on Opportunities

## Move an Opportunity to the Next Stage in Salesforce Classic

Track opportunity progress as you get closer to closing your deal.

 **Note:** These steps work in Salesforce Classic. If you see 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. Edit the opportunity record you want to update.
2. Select the new stage.
3. Save the record.

## Add and Edit Products on Opportunities

Track what's selling and in what quantity by adding products to opportunities. Then make sure that you maintain accurate records by updating the quantities and prices of the products.

1. Navigate to the opportunity that you want to edit.
2. From the Products related list, either select **Edit** next to the product you want to modify or select **Add Product** to add a new product. If you're adding the first product, choose a price book for the opportunity.
3. When adding a new product, select one or more products from the list, or search for a product.
4. Enter the attributes for each product. Admins can customize this page to include fields that are specific to your business.
5. Enter the **Sales Price** for the product. The sales price defaults to the list price that's specified in the price book that's assigned to the opportunity. Depending on your user permissions, you can override this value.
6. If the product has a discount, type the discount as a number with or without the percent sign (%) in the **Discount** field. If the **Discount** field isn't available, check with your administrator.
7. Enter the number of products at this price in the **Quantity** box.

### EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

### USER PERMISSIONS

To create opportunities:

- Create on Opportunities

To view opportunities:

- View on Opportunities

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To add or edit opportunity products:

- Edit on opportunities

AND

Read on products and price books

- 8. Save your changes.

SEE ALSO:

[Considerations for Adding Products to Opportunities](#)  
[Opportunity Product Fields](#)  
[Products](#)

Schedule Reminders to Update Opportunities

To ensure your team is keeping their opportunities up to date, create an automated email that contains a report of your team’s open opportunities and send it to your direct reports.

For example, you can schedule a weekly report of all the opportunities for the current fiscal quarter owned by anyone on the team and have the report distributed to everyone on the team.

- 1. Make sure that opportunity update reminders are enabled.
- 2. From your personal settings, enter *Reminder* in the *Quick Find* box, then select **My Update Reminder**.
- 3. Check *Active* if you want reminders to start after you save the settings.
- 4. Enter a name and address for the sender of the reminders.
- 5. Choose a recipients option.
- 6. Enter any other recipients in the *CC* field. Separate email addresses with commas, semi-colons, spaces, or new lines.
- 7. Enter a subject and message to be included in the email reminders.
- 8. Select a schedule frequency.
- 9. Select *Include Past Due Opportunities* to include all open opportunities that have a closing date within 90 days before the specified *Close Date*.

For example, suppose that your organization uses a normal fiscal year and the current quarter started on 4/1/2012. You configure update reminders for opportunities closing in the current quarter and then select *Include Past Due Opportunities*. When the update reminder is sent on 6/15, it includes all opportunities from 4/1 to 6/15. It also includes open opportunities with a closing date between 1/2 and 4/1 (there are 91 days in Q1).

- 10. Choose a *Close Date* to include opportunities with dates within that range.
- 11. Select the fields to include in the email reminders.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
Last Login Date	Most recent login date of the opportunity owner
# of Open Opportunities	Total number of opportunities in the report
# Not Updated in Last 30 Days	Total number of opportunities that have not been updated in 30 days
Open Opportunity Amount	Total of all opportunity amounts in report
Total Closed Amount	Total closed amount for all opportunities in report. If your organization uses multiple currencies, this amount is converted to the user's currency. If your organization uses

Field	Description
	advanced currency management, the conversion is done using dated exchange rates.
Last Update Date	Most recent date the opportunity owner submitted a forecast.  If your organization uses multiple currencies, this amount is converted to the user's currency. If your organization uses advanced currency management, the conversion is done using dated exchange rates.

## 12. Click **Save**.

When there are no records in an opportunity update reminder, Salesforce doesn't send an email. If no email is sent for three consecutive opportunity update reminders, the scheduled reminder is deactivated.

## Understand How Opportunities Work

Understand these key concepts so you can use opportunities more effectively throughout Salesforce.

### IN THIS SECTION:

#### [Opportunity Field History](#)

Field History lets you track the changes made to an opportunity, including changes to the stage, so you can quickly see who changed the opportunity and when.

#### [Guidelines and Considerations for Using Opportunities](#)

To take full advantage of Opportunities, you should understand these guidelines and considerations.

### SEE ALSO:

[Opportunities](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

## Opportunity Field History

Field History lets you track the changes made to an opportunity, including changes to the stage, so you can quickly see who changed the opportunity and when.

There are two related lists that track changes to the fields on an opportunity record.

### Opportunity Field History

Any time a user modifies any of the standard or custom opportunity fields that are set to be tracked, a new entry is added to the Opportunity Field History related list. All entries include details of the change and who made it. Your administrator can choose which fields to track.

### Stage History

Any time a user changes the `Amount`, `Probability`, `Stage`, or `Close Date` fields, a new entry is added to the Stage History related list. All entries include details of the change and who made it. Your administrator can't choose which fields to track.

Changes to the `Amount` and `Quantity` fields are tracked even when the field is updated as the result of a change to an opportunity's products or schedules.

#### SEE ALSO:

[Understand How Opportunities Work](#)

## Guidelines and Considerations for Using Opportunities

To take full advantage of Opportunities, you should understand these guidelines and considerations.

#### IN THIS SECTION:

##### [Guidelines for Creating Opportunities](#)

Review these key guidelines when creating opportunities.

##### [Considerations for Deleting Opportunities](#)

Before you delete Salesforce opportunities, make sure you're familiar with these considerations.

##### [Considerations for Cloning Opportunities](#)

Cloning an opportunity quickly creates an opportunity with the same information as the existing one. Before you clone Salesforce opportunities, make sure you're familiar with these considerations.

##### [Considerations for Sharing Opportunities](#)

By sharing your opportunities with other user you give visibility into your pipeline so others can provide you with important information to help you close your deals. Before you share your opportunities, make sure you're aware of these considerations.

##### [Guidelines for Finding Similar Opportunities](#)

Close your deals faster by taking advantage of the rich information contained in successfully closed deals that are similar to yours. Here are some guidelines to help you find the opportunities that will help you close your deals.

##### [Considerations for Adding Products to Opportunities](#)

If you're an admin or sales operations manager, consider key concepts before you add products to opportunities.

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

#### USER PERMISSIONS

To view opportunities:

- Read on opportunities

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

## Guidelines for Creating Opportunities

Review these key guidelines when creating opportunities.

### Contacts and Contact Roles

- To associate an opportunity with an account or contact, you must have at least read access to the account or contact.
- In Salesforce Classic, when you create an opportunity from a contact record, that contact is automatically listed as the primary contact in the Contact Roles related list of the opportunity. In Lightning Experience, when you create an opportunity from a contact record, you're prompted to assign a contact role to that contact.

### Divisions

If your organization uses Divisions, the division of a new opportunity is automatically set to the division of the related account.

### Forecasts

- In Professional, Enterprise, Unlimited, Performance, and Developer Editions, opportunities you create are automatically given the forecast category that corresponds to the opportunity stage you assign. Your administrator correlates opportunity stages and forecast categories when editing the `Stage` picklist values.
- If the opportunity is set to close in a given month, as determined by the `Close Date`, the opportunity is automatically added to the forecast for that particular month, unless the forecast category on the opportunity is set to *Omitted*.

### Multicurrency

If your organization uses multiple currencies, your opportunity amounts are initially shown in your personal currency. Change the `Opportunity Currency` picklist to track the sales revenue in another currency.

### Opportunity Splits

When team selling and splits that total 100% are enabled, you're automatically added to the opportunity team and initially assigned 100% of the split.

### Territory Management

If your organization uses [territory management](#), opportunities that you create are automatically assigned a territory when both of the following conditions are met.

- You belong to or have edit privileges on the same territory as the account on the opportunity.
- You have no other territories in common with that account. (Note that if you have the "Manage Territories" permission, you have access to all territories, including the parent territories of the account. In this case, you *do* have other territories in common with the account, unless the account is only assigned to a single top-level territory. No territory is assigned to the opportunity.) For example, if you are in the territories Berkeley and San Francisco and the account is in the territories Portland, San Francisco, and Seattle, the opportunity is assigned to the San Francisco territory.

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Opportunity Splits available in: Salesforce Classic

Available in: **All** Editions for orgs activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions for orgs activated after Summer '09

Opportunity Splits and territory management available in: **Performance and Developer** Editions and in **Enterprise and Unlimited** Editions with the Sales Cloud

## Considerations for Deleting Opportunities


Before you delete Salesforce opportunities, make sure you're familiar with these considerations.

- You can delete an opportunity if you're an administrator, the opportunity owner, or a user above the opportunity owner in the organization role hierarchy, and you have the "Delete" permission on opportunities.
- When you delete an opportunity, all related notes, attachments, quotes, quote line items, quote PDF files, events and tasks, partner relationships, competitor strengths/weaknesses, contact roles, and stage history are deleted.
- The deleted opportunity is moved to the Recycle Bin and can be restored. If you restore the opportunity, any related items are also restored.
- Associated contacts and accounts are not deleted with the opportunity.

## Considerations for Cloning Opportunities

Cloning an opportunity quickly creates an opportunity with the same information as the existing one. Before you clone Salesforce opportunities, make sure you're familiar with these considerations.

- If you have read-only access to a field, the value of that field isn't included in the cloned opportunity.
- If the opportunity has an associated opportunity team, the team isn't included in the cloned opportunity..
- If the opportunity has any associated products that contain unique custom fields, delete the values in the custom fields before cloning the opportunity.
- If the clone button isn't visible, you might not have permission to create opportunities, or your Salesforce admin might have removed it from the page layout. Ask your Salesforce admin for help.

 **Note:** If you have read-only access to a field, the value of that field is not carried over to the cloned record.

SEE ALSO:

[Opportunity Fields](#)

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

## Considerations for Sharing Opportunities

By sharing your opportunities with other user you give visibility into your pipeline so others can provide you with important information to help you close your deals. Before you share your opportunities, make sure you're aware of these considerations.

- Your administrator determines your organization's sharing model, including the default opportunity access levels for territories.
- While you can increase access to your opportunities, you can't restrict it below your organization's default access levels.
- To share an opportunity with another user, that user must have the "Read" permission on opportunities.
- The sharing detail page lists the users, groups, roles, and territories that have sharing access to the opportunity.

## Guidelines for Finding Similar Opportunities

Close your deals faster by taking advantage of the rich information contained in successfully closed deals that are similar to yours. Here are some guidelines to help you find the opportunities that will help you close your deals.

- Use the Similar Opportunities related list on the opportunity's detail page to find Closed/Won opportunities with common information.
- The criteria used to find similar opportunities is determined by your administrator. The search finds a maximum of 10,000 opportunities with close dates in a three-month period and displays up to 300 of the records that best match the search criteria. The results are ranked by the number of matching fields.
- Results can be filtered by Close date or by matching fields.
- To see how a record in the search results is similar to your current deal, hover over the opportunity name. The matching fields are highlighted in the Match Criteria sidebar.

## Considerations for Adding Products to Opportunities

If you're an admin or sales operations manager, consider key concepts before you add products to opportunities.

- The opportunity **Amount** is the sum of the products that you add to the opportunity. You can't edit the **Amount** unless you delete the products from the opportunity.
- The total price is the quantity multiplied by the sales price.
- You can add products with schedules in Lightning Experience or Salesforce1, but must switch back to Salesforce Classic to enable product schedules, or to establish or modify schedules for products.
- For multicurrency orgs, the opportunity **Currency** is tied to the currency of the associated price book entry. You can't edit the **Currency** unless you delete the products from the opportunity.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

### 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

### EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

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



## Opportunity Fields

The fields for opportunities contain a wide variety of information to help you track your pending and potential sales. Depending on your page layout and field-level security settings, some fields may not be visible or editable.


Field	Description
Account Name	<p>Name of account that opportunity is linked to. You can enter the account name, or select the account using the lookup icon.</p> <p>If you change the account for an opportunity that has partners, all partners are deleted from the Partners related list.</p>
Amount	<p>Estimated total sale amount. For organizations using multiple currencies, the amount is shown in your personal currency by default. Change the <code>Opportunity Currency</code> picklist to track the amount in another currency.</p> <p>For opportunities with products, the amount is the sum of the related products. You cannot directly edit the amount unless the opportunity has no products. To change the amount for an opportunity that contains products, edit the sales price or quantity of the related products.</p> <p>If you change the price book for an opportunity that has products, all products are deleted from the Products related list, but the value in the opportunity's Amount field remains.</p>
Close Date	<p>Date when you plan to close the opportunity. You can enter a date, or choose a date from the calendar that displays when you put your cursor in the field.</p> <p>Opportunities with a <code>Close Date</code> in a given month will tally in the forecast for that month, unless you assign them to the Omitted category while editing the forecast.</p> <p>When you set an open opportunity's <code>Stage</code> to a type of "Closed/Won," the <code>Close Date</code> is set to the current date in Coordinated Universal Time (UTC) if the original date was in the future. At certain times of day, UTC will differ by one day from your time zone. If the close date was in the past when the opportunity is closed, the date does not change.</p>
Contract	Contract that the opportunity is linked to.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
Created By	User who created the opportunity including creation date and time. (Read only)
Custom Links	Listing of custom links for opportunities as set up by your administrator. Available only in Salesforce Classic.
Description	Description of the opportunity. Up to 32KB of data are allowed. Only the first 255 characters display in reports.
Expected Revenue	Calculated revenue based on the Amount and Probability fields.
Forecast Category	Forecast category name that is displayed in reports, opportunity detail and edit pages, opportunity searches, and opportunity list views. The setting for an opportunity is tied to its Stage. For more information on forecast categories, see <a href="#">Working with Forecast Categories</a> on page 345.
Last Modified By	User who last changed the opportunity fields, including modification date and time. This does not track changes that are made to any of the related list items on the opportunity. (Read only)
Lead Source	Source of the opportunity, for example, Advertisement, Partner, or Web. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Next Step	Description of next task in closing opportunity. Up to 255 characters are allowed in this field.
Opportunity Currency	<p>The default currency for all currency amount fields in the opportunity. Amounts are displayed in the opportunity currency, and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.</p> <p>For opportunities with products, the currency is tied to the currency of the associated price book. You cannot directly edit this field unless you first delete the products.</p>
Opportunity Division	<p>Division to which the opportunity belongs. This value is automatically inherited from the related account.</p> <p>Available only in organizations that use divisions to segment their data.</p>
Opportunity Name	Name of the opportunity, for example, Acme.com - Office Equipment Order. Up to 120 characters are allowed in this field.
Opportunity Owner	Assigned owner of opportunity. Not available in Personal Edition.
Opportunity Record Type	Name of the field that determines what picklist values are available for the record. The record type may be associated with a sales

Field	Description
	process. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.
Partner Account	Read-only field that indicates the opportunity is owned by a partner user.
Primary Campaign Source	<p>Name of the campaign responsible for generating the opportunity.</p> <p>For opportunities created during lead conversion, this field is automatically filled in with the campaign name from the lead. If the lead has multiple associated campaigns, the campaign with the most recently updated member status is inserted into the opportunity.</p> <p>For opportunities with multiple influential campaigns, click <b>Edit</b> next the primary campaign in the Campaign Influence related list on the opportunity detail page and select the <code>Primary Campaign Source</code> checkbox. The campaign will display in the <code>Primary Campaign Source</code> field on the opportunity.</p>
Private	<p>Indicates that the opportunity is private. Only the record owner, users above that role in the hierarchy, and administrators can view, edit, and report on private opportunities. Not available in Group or Personal Editions. Private opportunities do not trigger Big Deal Alerts or workflow rules. Private opportunities count towards your forecasts only if you have Customizable Forecasting or Collaborative Forecasts enabled. Users with the "View All Forecasts" permission can see private opportunities within the Forecasts tab.</p> <p> <b>Note:</b> When you mark opportunities <code>Private</code>, any opportunity teams, opportunity splits, and sharing are removed. (The owner of a private opportunity receives 100% of split types that total that amount.)</p>
Probability	<p>Likelihood that opportunity will close, stated as a percentage.</p> <p>The <code>Probability</code> value is always updated by a change in the <code>Stage</code> value, even if <code>Probability</code> is marked as read only on your page layout. Users with access to edit this field can override the value.</p>
Quantity	Total of all <code>Quantity</code> field values for all products in the Products related list if the opportunity has products. General use field if the opportunity does not have products.
Stage	Current stage of opportunity based on selections you make from a predefined list, for example, Prospect or Proposal. Entry is selected from a picklist of up to 100 available values, which are set by an administrator. Each picklist value can have up to 40 characters.

Field	Description
	<p>Your administrator correlates the values in this picklist with Forecast Category values that determine how the opportunity contributes to your forecast.</p> <p>When you set an open opportunity's <code>Stage</code> to a type of "Closed/Won," the <code>Close Date</code> is set to the current date in Coordinated Universal Time (UTC) if the original date was in the future. At certain times of day, UTC will differ by one day from your time zone. If the close date was in the past when the opportunity is closed, the date does not change.</p>
Synced Quote	Quote that's synced to the opportunity. Only one quote can sync to the opportunity at a time.
Territory	Territory with which the opportunity is associated. Only available if your organization has territory management.
Type	Type of opportunity, for example, Existing Business or New Business. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.

## SEE ALSO:

[Opportunity Product Fields](#)
[Opportunities](#)

## Opportunity Product Fields

The fields for opportunity products contain information to help you track what's selling. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

Field	Description
Active	Whether the price book entry (product and list price) is active and can be added to an opportunity or quote.
Created By	Name of the user who created the product.
Date	Close date of a particular opportunity product.
Discount	Discount for the product as a percentage.
Last Modified By	User who last changed the opportunity product fields. (Read only)
Line Description	Text to distinguish this opportunity product from another.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
List Price	The price of the product within the price book, including currency.
Opportunity	Name of the opportunity for this opportunity product.
Product	Item listed in the Products related list on an opportunity.
Product	The product's name.
Quantity	Number of units for the opportunity product.
Sales Price	Price for the products in the opportunity product.
Subtotal	Difference between standard and discounted pricing. Converted currency amounts when the opportunity's currency is different from the user's currency.
Total Price	Sum of all the product amounts for this opportunity product.

SEE ALSO:

[Opportunity Fields](#)

[Opportunities](#)

## Teaming Up for Sales Opportunities

### Opportunity Teams

An opportunity team is a group of Salesforce users who work together on a sales opportunity.

Opportunity teams shows who's working on the opportunity and what each team member's role is. You can grant your opportunity team members special access to the opportunity and its related records, making it easier for everyone to work together.

Using opportunity teams makes it easier for you to track the work of a team, too. In opportunity reports, filter opportunities by the opportunity teams that you're a member of. When creating or editing a custom list view for opportunities in Salesforce Classic, select the My Opportunity Teams filter.

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

IN THIS SECTION:

[Guidelines for Using Opportunity Teams](#)

An opportunity team is a group of Salesforce users who work together on a sales opportunity. If you're using opportunity teams, refer to these guidelines.

[Guidelines for Editing Members of an Opportunity Team](#)

Keep the details about your opportunity team members up-to-date by changing their access level, team role, and more. If you're editing team members, refer to these guidelines for information.

[Considerations for Deleting Members from an Opportunity Team](#)

Keep your opportunity teams up-to-date by deleting members who are no longer part of a team. If Opportunity Splits is enabled, consider the following before you delete a team member.

### [Guidelines for Setting Up and Adding a Default Opportunity Team](#)

Save time by setting up a default opportunity team—a group of coworkers who you typically work with on opportunities. Then add the team to opportunities that you own. If you're working with a default opportunity team, refer to these guidelines for additional information.

### [Opportunity Team Fields](#)


Opportunity Team data is stored in these standard fields.

SEE ALSO:

[Opportunity Splits](#)

## Guidelines for Using Opportunity Teams

An opportunity team is a group of Salesforce users who work together on a sales opportunity. If you're using opportunity teams, refer to these guidelines.

-  **Note:** Opportunity teams aren't the same as account teams, although they share a set of available team member roles.
- Set up opportunity teams for opportunities that are owned by you or someone below you in the role hierarchy.
- Set up a default opportunity team to include the users who you normally work with on opportunities. You can choose to add your default opportunity team to all your opportunities automatically.
- When you set up an opportunity team, you:
  - Add team members.
  - Specify each member's role on the opportunity, such as Executive Sponsor.
  - Specify each team member's level of access to the opportunity: read/write access or read-only access.
- Changes that you make to the opportunity team on an opportunity don't affect your default opportunity team or the opportunity teams on your other opportunities.
- If your Salesforce admin has enabled Opportunity Splits, you can split credit for an opportunity among members of an opportunity team.
- Adding, editing, or deleting opportunity team members requires read/write access on the opportunity.
- You can't use opportunity teams for private opportunities.

SEE ALSO:

[Guidelines for Setting Up and Adding a Default Opportunity Team](#)

[Opportunity Team Fields](#)

### 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

## Guidelines for Editing Members of an Opportunity Team

Keep the details about your opportunity team members up-to-date by changing their access level, team role, and more. If you're editing team members, refer to these guidelines for information.

- If the team member that you need to update doesn't appear in the Opportunity Team related list, view the full list.
- You edit opportunity team members on the detail page of the opportunity team member that you need to update.
- When editing inactive users with assigned split percentages, you can edit only the split-related fields.
- If your Salesforce admin defined custom fields, you'll see them when you edit a team member, even if your admin didn't add them to the Add Opportunity Team Members page.
- The member's opportunity access level can't be less than your Salesforce org's default opportunity sharing access.

### SEE ALSO:

[Guidelines for Using Opportunity Teams](#)

[Considerations for Deleting Members from an Opportunity Team](#)

### 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

## Considerations for Deleting Members from an Opportunity Team

Keep your opportunity teams up-to-date by deleting members who are no longer part of a team. If Opportunity Splits is enabled, consider the following before you delete a team member.

- If the team member that you want to delete is assigned a split percentage greater than zero, reassign the split before you delete the member.
- You can't delete the opportunity owner from the opportunity team. To remove this member from splits calculations, assign the member a split percentage of zero, or transfer ownership of the opportunity.

### SEE ALSO:

[Guidelines for Editing Members of an Opportunity Team](#)

[Guidelines for Using Opportunity Teams](#)

## Guidelines for Setting Up and Adding a Default Opportunity Team

Save time by setting up a default opportunity team—a group of coworkers who you typically work with on opportunities. Then add the team to opportunities that you own. If you're working with a default opportunity team, refer to these guidelines for additional information.

- To set up a default opportunity team, access Advanced User Details in your personal settings.
- While you're defining your default opportunity team, you can choose to automatically add it to all your open opportunities. If you don't choose this option, you add the default team from the Opportunity Team related list of your opportunities.

### 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

### USER PERMISSIONS

To remove team members:

- Read on users
- AND
- Edit on opportunities
- AND
- Owner of the opportunity, or above the owner in your organization's role hierarchy

To view an opportunity for which you're a team member:

- Read on the opportunity

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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



- Clicking **Add Default Team** adds the default team of the opportunity owner, not of the user who clicks the button.
- Salesforce admins and users above you in the role hierarchy can add your default opportunity team to opportunities that you own.

SEE ALSO:

[Opportunity Teams](#)

## Opportunity Team Fields

Opportunity Team data is stored in these standard fields.

Field	Description
Opportunity Access	The level of access that a team member has to the opportunity. The access level can be read/write or read only, but it can't be less than your Salesforce org's default opportunity sharing access.
Team Role	The role that the team member plays for the opportunity, such as Account Manager.
User	The user who's listed as part of the team.

SEE ALSO:

[Opportunity Teams](#)

## Opportunity Splits

Opportunity splitting lets you share revenue from an opportunity with your team members. Team members working on an opportunity can roll their individual sales credits into quota and pipeline reports for the entire team.


 [Watch a Demo \(Salesforce Classic\)](#) (1:44 minutes)

If your Salesforce admin has enabled Opportunity Splits, and you're the opportunity owner or above the owner in the organization hierarchy, you can add and adjust splits for the opportunity.

- To credit team members who are directly responsible for opportunity revenue, use *revenue* splits, which always total 100% of the opportunity amount.
- To credit supporting team members, use *overlay* splits, which can total any percentage of the opportunity amount, including percentages over 100%.

Your Salesforce org's `Split on Opportunity - Amount` field comes with one revenue split and one overlay split. If custom split types are enabled for your org, your Salesforce admin can create three more split types. Your admin decides which types of splits always total 100%. To have custom split types enabled for your org, ask your admin to contact Salesforce.

Your admin can also create custom fields for opportunity splits, allowing you to better track and store information about splits that you create for team members.

 **Note:** Splits can't be rolled up to sales territories. For information about including splits in your forecasts, see [Change Between Forecast Types](#).

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### EDITIONS

Available in: Salesforce Classic

Available in: **Performance** and **Developer** Editions

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

## IN THIS SECTION:

[Considerations for Creating Opportunity Splits](#)

If you're creating opportunity splits to share opportunity revenue with coworkers, review these guidelines for information.

[Create Opportunity Splits](#)

Add and adjust splits to share revenue from opportunities with your team members.

## SEE ALSO:

[Create Opportunity Splits](#)

## Considerations for Creating Opportunity Splits

If you're creating opportunity splits to share opportunity revenue with coworkers, review these guidelines for information.

- The opportunity owner is automatically included in the opportunity team and initially assigned 100% of the split types that always total 100%.
- If you can't add a team member when you're editing the opportunity split, add the member in the Opportunity Team related list on the main opportunity page. (To add members while editing splits, contact your Salesforce admin.)
- If you don't see splits on a field, ask your Salesforce admin to check your field-level security limits.
- To determine whether a split type always totals 100%, look for "must total 100%" in the description of the split.
- Split percentages are limited to two decimal places. If you enter a monetary amount that requires a split percentage with more than two, the amount is automatically rounded.

### EDITIONS

Available in: Salesforce Classic

Available in: **Performance** and **Developer** Editions


Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

## SEE ALSO:

[Create Opportunity Splits](#)

## Create Opportunity Splits

Add and adjust splits to share revenue from opportunities with your team members.

1. In the Opportunity Splits related list of an opportunity, click **Edit Opportunity Splits**.
2. Complete the fields as needed.
3. To remove a team member from the split, click  or **Del** next to the team member's name.
4. Save your changes.

SEE ALSO:

[Considerations for Creating Opportunity Splits](#)  
[Opportunity Splits](#)

### EDITIONS

Available in: Salesforce Classic

Available in: **Performance** and **Developer** Editions

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

### USER PERMISSIONS

To add splits for opportunity team members:

- Edit on opportunities
- AND
- Owner of opportunity record or above owner in organization hierarchy

## Knowing Your Competitors

### Competitors Overview

You can track competitors in a pending sale by listing the competitors' names in the opportunity. You can enter the names of new competitors, or choose from a list of competitors defined by your administrator. To access this information, go to the Competitors related list of the opportunity.

SEE ALSO:

[Defining Competitors](#)

### 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

## Defining Competitors

Create a picklist of competitors that your users can attach to opportunities. To add competitors to the picklist:

1. From Setup, enter *Competitors* in the **Quick Find** box, then select **Competitors**.
2. Click **New** to add competitor names to the list.
3. Enter the name of the competitor.
4. Optionally, check the default option to select this value on any new record when another value is not selected.
5. Click **Save**.

### SEE ALSO:

[Competitors Overview](#)

[Viewing and Editing Competitors](#)

## Viewing and Editing Competitors

The Competitors related list of an opportunity shows the competitors for that deal.

- To view information for a competitor, click the competitor's name.
- Click **Edit** next to a competitor's name to edit the strengths and weaknesses of the competitor for the opportunity.
- To add a competitor, click **New**. Enter the competitor's name, or click the lookup icon to select from a list of competitors defined by your administrator. It does not need to be an existing account or contact. Then specify the strengths and weaknesses of the competitor, which may be different for each opportunity.



**Note:** To add or create a competitor on an opportunity, you must also have access to edit that opportunity.

### SEE ALSO:

[Competitor Fields](#)

### 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 define competitors:

- Customize Application

### EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

### USER PERMISSIONS

To view competitors:

- Read on opportunities

To edit competitors:

- Edit on opportunities

## Competitor Fields

A competitor has the following fields, listed in alphabetical order.

Field	Description
Competitor Name	Name of competitor. You can enter any name, or select from the list of all competitors defined by your administrator.
Strengths	Description of competitor's key selling points and advantages.
Weaknesses	Description of competitor's key disadvantages.

SEE ALSO:

[Defining Competitors](#)

[Viewing and Editing Competitors](#)

## Deleting Competitors

You can delete a competitor from the opportunities page by clicking the **Del** link next to a competitor's name in the Competitors related list.



**Note:** To delete a competitor from an opportunity, you must also have access to edit that opportunity.

SEE ALSO:

[Competitors Overview](#)

### 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

### 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 delete competitors:

- Edit on opportunities

## Improve Your Performance with Work.com

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### Feedback Overview

#### EDITIONS

Available in: Salesforce Classic

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

Feedback requires a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

Work.com Feedback allows you to request and offer unsolicited feedback on a person or topic, and also respond to feedback related to performance summaries.

Feedback offers, feedback requests, and feedback related to performance summaries are all managed from the Feedback tab. The Feedback tab displays the recent feedback you've viewed by default, and you can filter to see different types of feedback records. For example, select **New Feedback Requests** to see feedback records that require their input. You can also create custom list views with different filter options.

The default feedback filters include:

- All Feedback—All feedback, including one-time feedback and performance summary feedback
- Declined Feedback Requests—All the feedback you've requested that others have declined
- Feedback About Me—All the completed feedback about you
- Feedback About My Team—All the completed feedback about your team
- Feedback About Others—Completed feedback about others
- Feedback About Topics—Completed feedback about topics
- New Feedback Replies—New replies to the feedback you've requested
- New Feedback Requests—New feedback requests for one-time feedback and performance summaries

## USER PERMISSIONS

To view feedback:

- Read on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests
- AND
- Read on Performance Cycles

To create feedback:

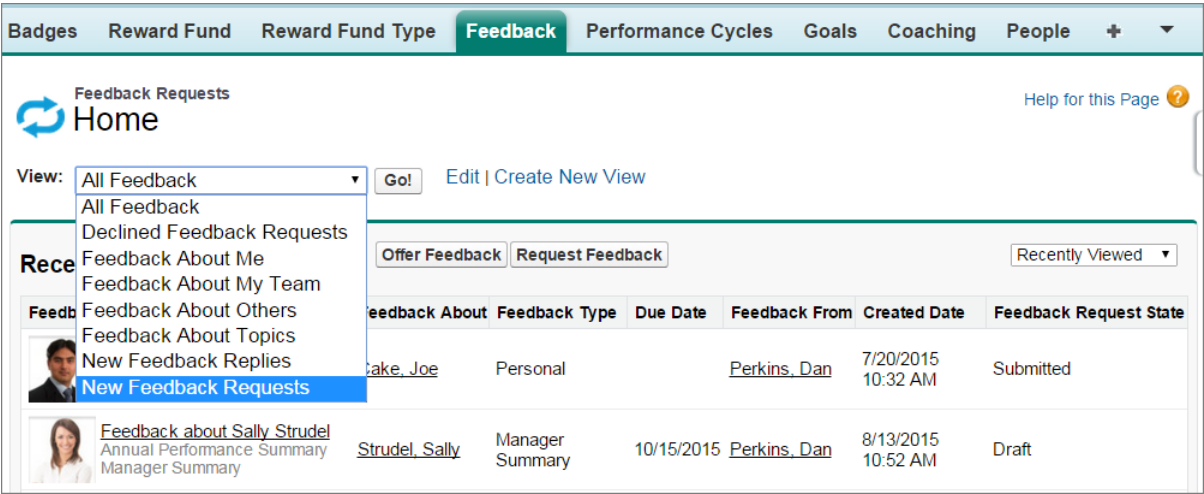
- Create on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests
- AND
- Read on Performance Cycles

To edit or submit feedback:

- Edit on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests
- AND
- Read on Performance Cycles

To delete feedback (only for admin users with MAD/VAD permissions):

- Delete on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests
- AND
- Read on Performance Cycles



On the feedback page, you can:

- View and filter your feedback list for new requests, replies, and other feedback
- Click a feedback record to view and edit details about the feedback
- Offer or request feedback

SEE ALSO:

- [Feedback Visibility](#)
- [Performance Summary Overview](#)

## Feedback Visibility

Visibility options are based on the type of feedback you choose.

### Feedback Requested

Only people to whom you sent the feedback request and an administrator with “Modify All Data” or “View All Data” access can view your request.

Feedback Requested About	Person Receiving the Request	Person’s Manager	Administrator with MAD/VAD Access
Topic	✓		✓
Myself	✓		✓
Another User	✓		✓

### Feedback Offered

You can only view feedback that is shared with you. For example, you won’t be able to view feedback about yourself that was shared only with your manager.





#### EDITIONS

Available in: Salesforce Classic

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

Feedback requires a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.



Feedback Offered	Person	Person's Manager	Administrator with MAD/VAD Access
Person Only			
Person and Manager			
Manager Only			

SEE ALSO:

[Feedback Overview](#)

## Performance Summary Overview

Work.com performance summaries gather feedback about people in your company via a custom questionnaire.

Use the Feedback tab to view the performance summaries you need to complete. Use the drop-down menu to filter your performance summaries and other feedback. Select **New Feedback Requests** to see one-time feedback and performance summaries that require your input.

### SEE ALSO:

[Add Peers to a Performance Summary](#)

[Complete a Summary](#)

[Decline a Performance Summary Request](#)

### EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

### USER PERMISSIONS

To view the Performance tab:

- Read on Performance Cycles

To view performance summaries:

- Read on Performance Cycles

To create performance summaries:

- Create on Performance Cycles

To answer and submit performance summaries:

- Create, Read, and Edit on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests

AND

Read on Performance Cycles

## Complete a Summary

- 1. On the Feedback tab, select **New Feedback Requests** from the feedback drop-down list.
- 2. Click **Go!**.
- 3. Select a performance summary.
- 4. Answer the questions in the summary. If available, click **Invite Peer** or **Invite Skip Level** to request reviews from others.  
To see recent work, such as thanks, goals, metrics, and feedback, click **Customize Related Lists** on a performance summary's detail page. You can't quote recent work directly in your responses, but you can manually add this information.

### EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

### USER PERMISSIONS

- To edit performance summaries:
- Create, Read, and Edit on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests
- AND
- Read on Performance Cycles

Feedback Request Detail

Save Draft

Submit

Reassign

Invite Peer

Invite Skip Level

Customize Related Lists

▼ Information

Feedback From	<a href="#">Dan Perkins</a>	Feedback Request State	Draft
Feedback About	<a href="#">Sally Strudel</a>	Feedback Type	Manager Summary
Initiated By	<a href="#">Dan Perkins</a> , 9/1/2015 2:47 PM	Performance Cycle	<a href="#">Annual Performance Summary</a>
		Last Submitted Date	
		Last Shared Date	

Save Draft

Submit

Reassign

Invite Peer

Invite Skip Level

Customize Related Lists

- 5. When you're finished writing the summary, click **Submit** or click **Save Draft** to make changes at a later time.

You can view submitted summaries using filters on the Feedback tab, including summaries about you or your team.

SEE ALSO:

[Performance Summary Overview](#)

[Add Peers to a Performance Summary](#)

[Decline a Performance Summary Request](#)

## Add Peers to a Performance Summary

Invite peers to review your performance summary.

1. On the Feedback tab, select **New Feedback Requests** from the feedback drop-down list.
2. Click **Go!**.
3. Select a performance summary.
4. If peer or skip reviews are included, at the top of the page, click **Invite Peer** or **Invite Skip Level**.
5. Type the name of the person you would like to invite and click **Save**.  
The person's name appears in the list of invited people and they receive an email that asks them to complete a peer or skip level summary.

SEE ALSO:

[Performance Summary Overview](#)

[Complete a Summary](#)

[Decline a Performance Summary Request](#)

### EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

### USER PERMISSIONS

To view performance summaries:

- Read on Performance Cycles

To add peers to performance summaries:

- Create, Read, and Edit on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests

AND

Read on Performance Cycles

## Decline a Performance Summary Request

Decline a performance summary request when feedback on that person or team is no longer required.

1. On the Feedback tab, select **New Feedback Requests** from the feedback drop-down list.
2. Click **Go!**.
3. Select a performance summary.
4. Click **Decline**.
5. Click **OK** on the confirmation message.
  - You can only decline self, peer, and skip-level summaries.
  - Saved answers are preserved and remain in the declined summary.
  - Declined summaries can be found on the Feedback page with the All Feedback filter.
  - Click **Reopen** from a declined summary's detail page to reopen the summary. Reopened summaries appear in the New Feedback Requests list.
  - After a performance cycle "Finishes," declined summaries can't be reopened.

### SEE ALSO:

[Performance Summary Overview](#)  
[Add Peers to a Performance Summary](#)  
[Complete a Summary](#)

### EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

### USER PERMISSIONS

To view the Performance tab:

- Read on Performance Cycles

To edit Performance Summaries:

- Create, Read, and Edit on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests

AND

Read on Performance Cycles

## Goals Overview

Work.com Goals allow you to define, track, and measure your work. Access goals via the Goals tab or Chatter profile pages.

The Goals tab on a user's profile displays the goals for that person. The top-level Goals tab is a general list view that can be configured to display different lists of goals (such as My Goals, My Team's Goals, or Key Company Goals). The tabs and list views that appear may vary depending on how your administrator configured Work.com.

### EDITIONS

Available in: Salesforce Classic

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

Goals requires a **Work.com** license, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

### USER PERMISSIONS

To view goals:

- Read on Goals and Goal Links

To create goals:

- Create on Goals and Goal Links

To edit goals:

- Edit on Goals and Goal Links

To delete goals:

- Delete on Goals and Goal Links

Goal Name	Owner Name
Meet Q2 Sales Quota	Gwen Brooks
Get Sales Certification	Gwen Brooks

Click a goal in your list view to access the detail page.

Goals support Chatter feeds on goal records, so different users can collaborate in the feed and keep up-to-date on a goal's progress.

**Goal**  
**Get Sales Certification**

[Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Show Feed](#)

[« Back to List: Users](#)

[Open Metrics \[0\]](#) | [Closed Metrics \[2\]](#) | [Parent Goals \[1\]](#) | [Subgoals \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#)

**Goal Detail**

[Edit](#) [Delete](#) [Clone](#) [Sharing](#) [Adjust Weights](#)

Goal Name	Get Sales Certification	Owner Name	Gwen Brooks <a href="#">[Change]</a>
Image URL		Start Date	
Key Company Goal	<input type="checkbox"/>	Due Date	
Description			
Status	Completed	Progress	100%

**▼ System Information**

Created By	Gwen Brooks, 2/31/2015 5:32 PM	Last Modified By	Gwen Brooks, 3/31/2015 5:42 PM
Completion Date	3/31/2015 5:32 PM		

The goal detail page lists the metrics, tasks, events, notes, attachments, and other information related to a particular goal. Align goals with others by linking your goals with parent goals or subgoals.

Modify sharing settings to better control who can see and update your goals. For example, if goals in your organization are set to private by default, goal owners and administrators can share goals with select users or groups to increase collaboration and visibility. Choose between read-only and read/write access for more granular control over goal access.

On the Open Activities related list, click **New Task** or **New Event** to create a task or event tied to a specific goal. You can also create tasks or events for individual metrics, if desired.

**Open Metrics** [New Metric](#) [Open Metrics Help](#)

Action	Metric Name	Progress	Status	Due Date	Current Value	Initial Value	Target Value	Owner Name	Comment	Weight
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Get 5000 in Sales</a>	66	On Track	9/1/2015	3,300.00	0.00	5,000.00	<a href="#">Dan Perkins</a>		60.00
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Get Sales Certification</a>	0	Postponed	9/1/2015				<a href="#">Dan Perkins</a>		10.00

**Closed Metrics** [Closed Metrics Help](#)

Action	Metric Name	Progress	Status	Due Date	Current Value	Initial Value	Target Value	Owner Name	Comment	Weight
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Finish Sales Training</a>	100	Completed	8/1/2015				<a href="#">Dan Perkins</a>		30.00

Add metrics to your goals to calculate your progress. You can also link metrics to data in your favorite reports to keep track of your work in Salesforce. Assign weights to different metrics to precisely track the completion of the goal.


#### SEE ALSO:

- [Create a Goal](#)
- [Metrics](#)
- [Coaching Overview](#)
- [Metrics](#)

## Create a Goal

Define, track, and measure your work with Work.com Goals.

### 1. Click the top-level Goals tab.

If the Goals tab isn't displayed, select Work.com from the Force.com app drop-down menu at the top-right or click  to the right of your current tabs and select it from the All Tabs page.

### 2. Click **New**.

### 3. Enter a name for the goal, and specify additional details.

You can adjust a goal's sharing settings after it's created. Note that all goal images are externally available.



**Tip:** To create a key company goal, select the **Key Company Goal** field. After the goal is created, click **Sharing** on the goal's detail page and share it with the All Internal Users group. Set the Access Level to Read Only to share it with the rest of your organization, or set it to Read/Write to allow everyone to collaborate on the goal.

### 4. Set the goal's status:

- **Draft**—The goal details are in draft state and haven't been finalized yet.
- **Published**—The goal details have been finalized and the goal is in progress.
- **Completed**—The goal is completed.
- **Canceled**—The goal is canceled and no longer applies.
- **Not Completed**—The goal is not completed.

### 5. Click **Save**.

You can reassign goals to other users by clicking **Change** next to Owner Name on a goal's detail page. Metrics can be owned by different users, so be sure to reassign metrics to the appropriate owner as well.

#### SEE ALSO:

- [Goals Overview](#)
- [Metrics](#)

#### EDITIONS

Available in: Salesforce Classic

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

Goals requires a **Work.com** license, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

#### USER PERMISSIONS

To view goals:

- Read on Goals and Goal Links

To create goals:

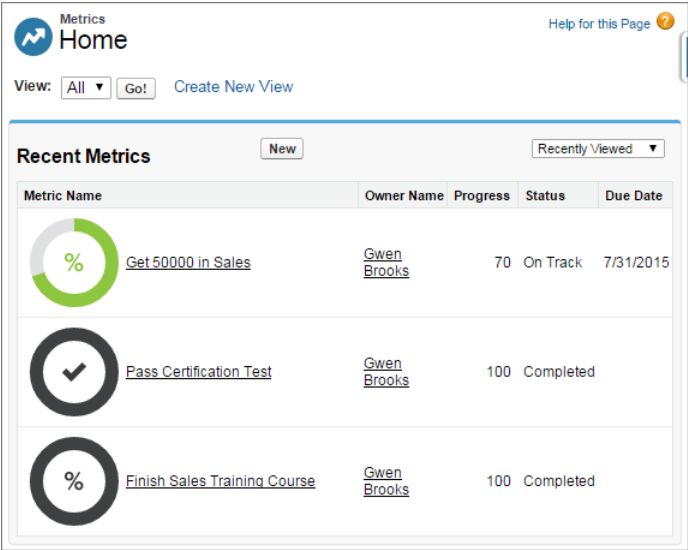
- Create on Goals and Goal Links



# Metrics

Use metrics to track and surface your data.

Create new metrics from the Metrics tab or from a goal detail page. Users can create standalone metrics or tie them to specific goals.



## EDITIONS

Available in: Salesforce Classic

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

Metrics requires a **Work.com** license, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

Use Progress or Completion metrics to track the status of different goals that you set for yourself or others. Anyone with read/write access can refresh metric values, and metrics can also appear in relevant coaching spaces and performance summaries.

Anyone with read/write access can refresh metric values, and metrics can also appear in relevant coaching spaces and performance summaries.

### IN THIS SECTION:

[Create a Metric](#)

Track and surface your work with Work.com Metrics.

### SEE ALSO:

[Create a Metric](#)

[Goals Overview](#)

[Create a Goal](#)

## Create a Metric

Track and surface your work with Work.com Metrics.

1. Click the Metrics tab.

Alternatively, you can click **New Metric** on a goal's detail page.

2. Click **New**.

3. Select a Progress or Completion record type and click **Continue**.

- Progress metrics measure achievement based on how much is finished compared to a targeted value. They're ideal for tracking hard numbers and percentages. For example, create progress metrics to *Convert 50 Leads* or *Achieve 100% Customer Satisfaction*.
- Completion metrics measure whether the metric was completed or not. They're ideal for tracking milestones or when you don't have metrics based on hard numbers. For example, create a completion metric to *Become Salesforce Certified*.

4. Enter a name for the metric and specify additional details.

5. For Progress metrics, enter a target value.

You can update the current value manually or link it to a Salesforce report. To link a metric value to a report:

- a. In the Current Value field, click **From a Salesforce report**.
- b. Select the Report Name.
- c. Select the Summary Field.

6. Set the metric's status.

7. Click **Save**.

SEE ALSO:

[Metrics](#)

[Goals Overview](#)

### EDITIONS

Available in: Salesforce Classic

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

Metrics requires a **Work.com** license, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

### USER PERMISSIONS

To view metrics:

- Read on Metrics

To create metrics:

- Create on Metrics


To link metrics to reports:

- Create on Metric Data Links

## Recognition Overview

Recognize and thank your coworkers by posting custom messages, badges, and rewards to their Chatter feed.

Work.com Recognition includes Thanks with unlimited custom badges and the ability to tie badges to tangible rewards such as gift cards. Managers can create reports and dashboards to view data on Recognition leaders. In addition to the required user permissions, your administrator must enable Thanks and Rewards for your organization. Depending on how your administrator configured Work.com, the Recognition tab and Badges tab may appear as top-level tabs. Additionally, the Recognition tab may appear as a subtab on your Chatter profile.

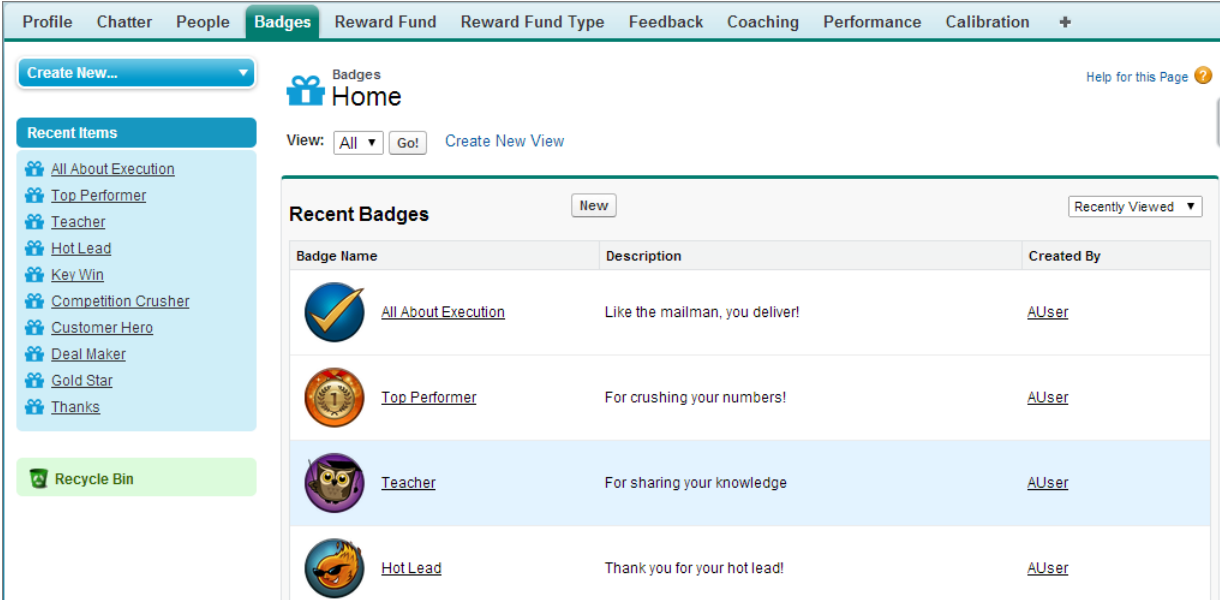
 **Note:** Users can create, edit, share, and give thanks badges without a Work.com license. However, users will still need a Work.com license to use badges tied to rewards. For more information about obtaining Work.com, contact Salesforce.





### EDITIONS

Available in: Salesforce Classic

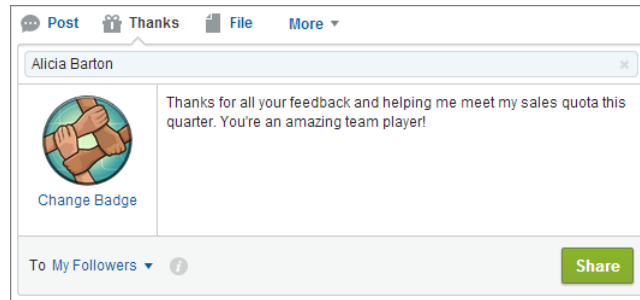
Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Rewards features require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.



Badge Name	Description	Created By
 <a href="#">All About Execution</a>	Like the mailman, you deliver!	<a href="#">AUser</a>
 <a href="#">Top Performer</a>	For crushing your numbers!	<a href="#">AUser</a>
 <a href="#">Teacher</a>	For sharing your knowledge	<a href="#">AUser</a>
 <a href="#">Hot Lead</a>	Thank you for your hot lead!	<a href="#">AUser</a>

Access the library of available badges from the Badges tab. Click **New** to create a badge, or click a badge to see or edit badge details. You can only view the badges you have permission to give, and your ability to create or edit badges may be limited depending on how your feature is configured.



Give thanks badges from the Chatter publisher. Users are currently limited to giving badges to one user at a time. For more information, see [Give Thanks to Your Coworkers](#).

View the badges a user has received on the Recognition tab of their Chatter profile.

SEE ALSO:

[Create a Badge](#)


[Configure Access to Thanks Badges](#)

[Reward Funds](#)

[Create Reward Funds](#)

# Create a Badge

Create custom badges to uniquely recognize and thank your coworkers.

- 1. Click the Badges tab.  
If the Badges tab isn't displayed, click  to the right of your current tabs and select it from the All Tabs page.
- 2. Click **New**.
- 3. Enter a name and description for the badge, add a badge image, and optionally assign rewards and badge limits.



**Note:**

- Only users with Rewards enabled can create a Rewards badge.
- Badges can't be transferred from a sandbox organization to a production organization.
- You can limit access to badge records with the Access related list, but badge images are externally available.

Badge Field	Description
Badge Name	The name of the badge.
Active	Indicates that the badge is active and available to give. This setting is enabled by default.
Reward Fund	Select a reward fund for this badge, if applicable.
Owner Name	The name of the badge owner.
Company Badge	Select to make this badge a company badge. Only users with the Chatter moderator permission can create and edit company badges. Company badges enable all users to give the badge.
Description	A description that explains the significance of the badge.
Image URL	A visual representation of the badge. Click the image field to select a picture from a directory on your computer. Badge images are stored at 128 x 128 pixels and are externally available.
Limit Number	The number of badges that are available. This can be per user or across all users. The default value is unlimited badges.
Limit Start Date	Indicates when the system begins to count the number of badges used. The default value is the date the badge is created.

## EDITIONS

Available in: Salesforce Classic

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

Rewards features require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

## USER PERMISSIONS

To view the Badges tab:

- No additional user permission needed

To build a badge:

- Create on Documents
- The Restrict Custom Badge Creator setting is disabled by default. If the setting is enabled, users need the Create Custom Badge Definitions permission.

Badge Field	Description
Limit Type	Select Per User to have Limit Number apply to each user. Select Per Company to have Limit Number apply to the entire organization.

4. Click **Save**.


Access for custom badges is set to all internal users by default. To change the access to a custom badge, go to the badge detail page and click **Edit List** on the Access related list.

SEE ALSO:

- [Recognition Overview](#)
- [Configure Access to Thanks Badges](#)
- [Reward Funds](#)

## Configure Access to Thanks Badges

Configure access to a thanks badge using its Access related list.

1. From the **Badges** tab, click the badge you’d like to modify.  
If you don’t see the Badges tab, click  to the right of your current tabs and select it from the All Tabs page.
2. Under the Access related list, click **Edit List**.
3. Enter the public groups or users you want to grant access to.  
You can only grant access to users with supported licenses.
4. Click **Save**.

SEE ALSO:

- [Recognition Overview](#)
- [Create a Badge](#)
- [Reward Funds](#)

EDITIONS

Available in: Salesforce Classic

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

Rewards features require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

## Reward Funds

Work.com Rewards allow you to tie tangible rewards to your badges. You can attach badges to tangible rewards from most digital gift codes globally.

Your administrator must enable Thanks and Rewards in your organization.

Work.com Rewards supports your choice of rewards programs or brands in addition to the default Amazon.com™ reward fund type. Reward information is stored in two objects, Reward Fund Type and Reward Fund. Here's a quick introduction to the differences between the two.

### Reward Fund Type

This object holds the fixed information about a reward such as the currency type, redemption information, and CSV file upload details. Examples include Amazon.com™, iTunes™, or Starbucks™.

### Reward Fund

This object holds the gifts codes and can only be tied to a single reward fund type. Each reward fund has a set value that you determine by purchasing gift codes for the specific denomination.

For example, a reward fund called Q1 US Rewards may contain codes linked to Amazon.com gift cards worth \$100 each. Another reward fund called Q1 Customer Service Rewards may contain codes linked to Amazon.com gift cards worth \$20 each. These reward funds would be related to the same reward fund type. However, a reward fund linked to Starbucks gift cards would be related to a different reward fund type.

You can create reward badges in three steps.

1. Create a reward fund type or use the default Amazon.com reward fund type.
2. Create a reward fund and upload reward codes.
3. Tie a thanks badge to a reward fund.

### SEE ALSO:

[Recognition Overview](#)  
[Create Reward Fund Types](#)  
[Create Reward Funds](#)  
[Create a Badge](#)

### EDITIONS

Available in: Salesforce Classic

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

Rewards features require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

### USER PERMISSIONS

To view Reward Funds:

- Read on Reward Funds

To create Reward Funds:

- Create on Rewards  
Create on Reward Funds

## Create Reward Fund Types

Use reward fund types to specify general reward information, such as currency codes, redemption information, and CSV file upload details.

1. Click the Reward Fund Type tab.

If the Reward Fund Type tab isn't available, click  to the right of your current tabs and select it from the All Tabs page.

2. Click **New**.
3. Enter the Reward Fund Type details.

### Information

Field	Description
Reward Fund Type Name	The name of the reward fund type. Try to pick something descriptive, like Amazon.CA (Canada) or Starbucks (US).
Credit System	Select Gift Codes to tie your rewards to a cash reward. Select Points if the reward is not tied to cash. Reward Fund Types that use Points ignore the Currency Code field.
Active	Whether the reward fund type is active or not.
Owner Name	The owner of the reward fund type.
Currency Code	The type of currency.
Predefined	Read-only setting that indicates if a reward fund type is predefined, like the default Amazon.com type. You can't change the name, credit system, or currency code on predefined reward fund types. Predefined fund types are system-generated and can't be edited.

### Redemption

Field	Description
Redemption Url	The URL where the reward is redeemed. This field is optional based on the type of reward code. For reward codes that are links, do not enter a redemption URL.
Redemption Information	The instructions for redeeming the reward, including any extra steps the user may need to take to redeem the reward.
Terms and Disclaimer	Extra legal information about the reward fund type.

### Upload Configuration

Field	Description
Reward Code Column	The column in a CSV file that specifies the reward codes. The upload uses the second column by default. Enter a number to specify a different column.

### EDITIONS

Available in: Salesforce Classic

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

Rewards features require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

### USER PERMISSIONS

To view Reward Fund Types:

- Read on Reward Fund Types

To create Reward Fund Types:

- Create on Reward Fund Types

Read and Create on Reward Funds

Read and Create on Rewards



Upload Configuration

Field	Description
Reward Value Column	The column in a CSV file that specifies the reward values. The upload uses the third column by default. Enter a number to specify a different column.

4. Click **Save**.


SEE ALSO:

- [Reward Funds](#)
- [Create Reward Funds](#)
- [Create a Badge](#)
- [Recognition Overview](#)

Create Reward Funds

Use reward funds to hold the gift codes related to a reward fund type.

Users can build reward badges from the reward funds they created. Reward funds can include Amazon.com™ gift cards purchased from one of our third-party vendors, such as TangoCard™, or different rewards programs beyond Amazon.com.

- Click the Reward Fund tab.  
If the Reward Fund tab isn't available, click  to the right of your current tabs and select it from the All Tabs page.
- Click **New**.
- Name your fund, select the Reward Fund Type, and enter the reward value.
- Click **Save**.
- Upload or enter your gift codes.
  - To upload gift codes through a CSV file, select **Upload CSV**, then select **Choose File**. Select a CSV file and click **Upload**.

By default, the upload uses the second column for reward codes and the third column for reward values. However, you can set these to different values on the related reward fund type. Here's an example of how you might format your CSV file:

	A	B	C
1	Sequence Number	Reward Code	Reward Value
2	1	1111-222222-3333	10
3	2	1111-222222-4444	10
4	3	1111-222222-5555	10
5	4	1111-222222-6666	10
6	5	1111-222222-7777	10

EDITIONS

Available in: Salesforce Classic

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

Rewards features require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

- To view Reward Funds:
- Read on Reward Funds
- To create Reward Funds:
- Create on Reward Funds
- Create on Rewards

 **Note:** Make sure the reward code data begins on the second row of the CSV file. The first row is seen as the header row and is not uploaded.

- To manually enter gift codes, select **New Reward**. Enter the gift code and click **Save**.

#### SEE ALSO:

[Recognition Overview](#)  
[Reward Funds](#)  
[Create Reward Fund Types](#)  
[Create a Badge](#)  
[Recognition Overview](#)

## Skills Overview

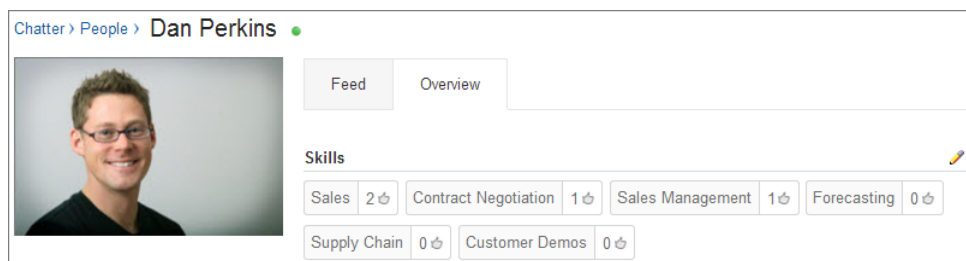
Skills allow users to share information about their professional expertise. With skills, users can discover, collaborate with, and endorse others based on their knowledge.

The Skills feature makes it easier to identify experts in different areas. Users can add or remove skills on their Chatter profile page or on record detail pages, and other users can endorse those skills. Use the global search bar to search for experts with specific skills.

#### EDITIONS

Available in: **Salesforce Classic**

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



#### IN THIS SECTION:

[Add a Skill Via Record Detail Pages](#)

Add skills to share your professional expertise.

[Remove a Skill Via Record Detail Pages](#)

Remove a skill if it no longer applies.

[Endorse a Skill Via Record Detail Pages](#)

Endorse a user's skill to promote their expertise in a specific area.

#### SEE ALSO:

[Add a Skill Via Record Detail Pages](#)

## Add a Skill Via Record Detail Pages

Add skills to share your professional expertise.

If the skill already exists, use the global search bar to find the skill, and click **Add to My Profile** on the skill record.

1. From your personal settings, enter *Advanced User Details* in the *Quick Find* box, then select **Advanced User Details**. No results? Enter *Personal Information* in the *Quick Find* box, then select **Personal Information**.
2. In the User Skills related list, click **New Skill**.
3. Enter the name of your skill and an optional description.
4. Click **Save**.  
The skill is created.
5. Click **Add To My Profile**.
6. Click **Save**.  
The skill is associated with you.

You can also add skills on Chatter profile pages.

SEE ALSO:

[Skills Overview](#)

[Remove a Skill Via Record Detail Pages](#)

[Endorse a Skill Via Record Detail Pages](#)

## Remove a Skill Via Record Detail Pages

Remove a skill if it no longer applies.

1. From your personal settings, enter *Advanced User Details* in the *Quick Find* box, then select **Advanced User Details**. No results? Enter *Personal Information* in the *Quick Find* box, then select **Personal Information**.
2. In the User Skills section, click **Del** next to the skill you want to remove.
3. Click **OK**.

The skill is no longer associated with you, but it's not deleted. Only skill owners with the proper permissions and users with "Modify All Data" can delete skills.

You can also remove skills on Chatter profile pages.

SEE ALSO:

[Skills Overview](#)

[Add a Skill Via Record Detail Pages](#)

[Endorse a Skill Via Record Detail Pages](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To add skills:

- Create on Skills and Skill Users

### EDITIONS

Available in: Salesforce Classic

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


### USER PERMISSIONS

To remove skills:

- Read on Skills  
AND  
Delete on Skill Users

## Endorse a Skill Via Record Detail Pages

Endorse a user's skill to promote their expertise in a specific area.

1. Go to the profile page of the user you'd like to endorse.
2. Click  in the upper right corner and select **User Detail**.
3. In the User Skills section, click the Skill User Name or Endorsements link next to the skill you'd like to endorse.
4. Click **Add Endorsement**.
5. Click **Save**.

You can also endorse skills on Chatter profile pages.

SEE ALSO:

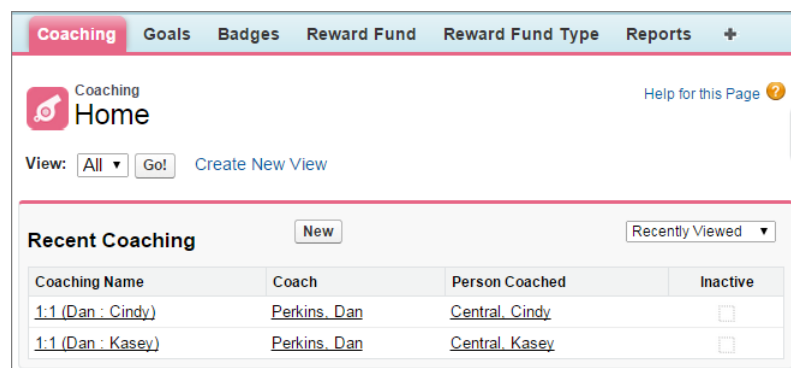
[Skills Overview](#)

[Add a Skill Via Record Detail Pages](#)

[Remove a Skill Via Record Detail Pages](#)

## Coaching Overview

With Work.com Coaching, you can privately coach or be coached by anyone in your company. You can also share coaching spaces to include additional observers and participants. Access Coaching via the Coaching tab or your profile page.



On the coaching page you can:

- View a list of your coaching spaces.  
You should create your own filters (such as My Coaches, People I Coach, and Inactive Relationships) that are suitable for your organization.
- Click **New** to create a coaching space. You can have as many coaching spaces as you want.

Click a coaching space in your list view to access the detail page.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To add endorsements to skills:

- Create on Endorsements  
AND  
Read on Skills and Skill Users

### EDITIONS

Available in: Salesforce Classic

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

Coaching requires a **Work.com** license, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

### USER PERMISSIONS

To view coaching spaces:

- Read on Coaching

To create coaching spaces:

- Create on Coaching



From this page you can:

- Click **Show Feed** to see the feed related to a coaching space.  
Your administrator must enable Chatter feed tracking to display the feed.
- Access the goals, metrics, activities, notes, and attachments related to a particular coaching space.
- Set coaching spaces to inactive when they're no longer useful. This retains the record history, and the coaching space can also be reactivated anytime.
- Delete coaching spaces if you have the right access level.

SEE ALSO:

[Goals Overview](#)

## Configure Work.com Email Settings

Enable Work.com email to receive notifications related to your Work.com feedback and rewards.

1. From your personal settings, enter *work.com* in the **Quick Find** box, then select **Email Settings** under Work.com.
2. In the General section, select **Receive emails**.  
You can deselect this option at any time, if you no longer want to receive any Work.com emails.
3. In the Personal section, select which type of emails you want to receive.

Email Setting	Description
Someone gives me a reward	Select this option, if you want to receive an email when someone gives you a reward.
I am asked for a feedback, or receive feedback to a question I've asked	Select this option, if you want to receive an email when someone asks for your feedback or someone answers a question you asked.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To configure email settings:

- No additional permissions required

4. Click **Save**.

## Creating Quotes and Documenting Contracts

### Quotes

Quotes in Salesforce represent the proposed prices of your company's products and services. You create a quote from an opportunity and its products. Each opportunity can have multiple associated quotes, and any one of them can be synced with the opportunity. When a quote and an opportunity are synced, any change to line items in the quote syncs with products on the opportunity, and vice versa. Get an overview of all your quotes on the Quotes tab. And if you're using Lightning Experience, track sales activity in Path and stages in Kanban.

#### IN THIS SECTION:

##### [Create and Manage Quotes](#)

Create quotes to show your customers the prices of the products and services that you offer. Create a set of quotes to show different combinations of products, discounts, and quantities so customers can compare prices. Then add products as needed to keep your quotes up to date.

##### [Sync Quotes and Opportunities](#)

Link a quote to the opportunity that it was created from. That way, updates to one record are always reflected in the other.

##### [Create and Email Quote PDFs](#)

Provide quotes to your customers the easy way: via PDF. Create quote PDFs from a standard template or from your company's design. Email quotes to your customers. Then delete quotes that you no longer need.

##### [Considerations for Deleting Quotes](#)

Before you delete a quote, it's a good idea to understand how deleting a quote affects quote-related PDFs and syncing with opportunities.

#### SEE ALSO:

[Opportunities](#)

#### 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 view quotes:

- Read on Quotes

To create quotes:

- Create on Quotes

To add quote line items:

- Edit on Quotes

AND

Read on Products and Price Books

## Create and Manage Quotes

Create quotes to show your customers the prices of the products and services that you offer. Create a set of quotes to show different combinations of products, discounts, and quantities so customers can compare prices. Then add products as needed to keep your quotes up to date.

1. Click **New Quote** on the Quotes related list on an opportunity. The `Subtotal`, `Discount`, `Total Price`, and `Grand Total` fields show values from the opportunity.
2. Complete the fields.
3. Save your changes.
  - A unique quote number is added.
  - Products on the opportunity are copied to the quote as line items.
  - The grand total is recalculated based on the taxes and shipping information that you entered.

To add a line item to a quote:

1. Click **Add Products** (Lightning Experience) or **Add Line Item** (Salesforce Classic) in the Quote Line Items related list.
2. If no price book was selected on the opportunity, select a price book for the quote. Otherwise, the quote uses the opportunity's price book.
3. Enter search criteria in the lookup to locate a line item.
4. Select the products that you want to add, and then click **Next** (Lightning Experience) or **Select** (Salesforce Classic).
5. Complete the fields. The sales price defaults to the product's list price as recorded in the price book. Depending on your permissions, you can edit the sales price.
6. Save your changes.

The line items are added to the Quote Line Items related list. The grand total in the detail section is the sum of the related line items. The discount is the average discount for the line items.

### SEE ALSO:

[Considerations for Creating and Managing Quotes and Quote Line Items](#)  
[Create and Email Quote PDFs](#)

### 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 view quotes:

- Read on Quotes

To create quotes:

- Create on Quotes

To add quote line items:

- Edit on Quotes

AND

Read on Products and Price Books

## Sync Quotes and Opportunities

Link a quote to the opportunity that it was created from. That way, updates to one record are always reflected in the other.

1. Open the quote that you want to sync, and then click **Start Sync**.
2. Follow the prompts until the quote and opportunity are synced.  
The opportunity's `Synced Quote` field and quotes related list identify the quote that's synced.
3. To stop syncing between a quote and an opportunity, open the synced quote, and then click **Stop Sync**.  
Updates are no longer synced between the records.
4. To sync a different quote with an opportunity, follow the steps for syncing a quote.  
The previously synced quote stops syncing, and the new quote starts.

### SEE ALSO:

[How Quote Syncing Works](#)

[Troubleshooting Quote Syncing](#)

## Create and Email Quote PDFs

Provide quotes to your customers the easy way: via PDF. Create quote PDFs from a standard template or from your company's design. Email quotes to your customers. Then delete quotes that you no longer need.

### IN THIS SECTION:

[Create a Quote PDF from the Standard Template](#)

Quickly create quote PDFs from the standard templates.

[Create a Quote PDF by Selecting a Template](#)

Select from the available templates to create a PDF.

[Email Quote PDFs](#)

Email quotes to your customers.

### SEE ALSO:

[Considerations for Creating Quote PDFs](#)

### 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 sync quotes:

- Create on quotes

### 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 or email quote PDFs:

- Edit on quotes



## Create a Quote PDF from the Standard Template

Quickly create quote PDFs from the standard templates.

If you haven't created custom templates or generated PDFs, start from the standard template.

1. On the quote detail page, generate a preview by clicking **Create PDF**.
2. Save the PDF to the Quote PDFs related list by clicking **Save to Quote**. The PDF name is the quote name plus a version number, such as *AcmeQuote\_V1*.

### 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

## Create a Quote PDF by Selecting a Template

Select from the available templates to create a PDF.

1. Do one of the following.
  - If you're using Lightning Experience, click **Create PDF**, and then choose a template from the dropdown list.
  - If you're using Salesforce Classic, click the **Create PDF** dropdown list, and then select a template from the Recent Templates list, or click *Choose Template* and search for the template that you want to use.
2. Generate a preview by clicking **Create PDF**.
3. Save the PDF to the Quote PDFs related list by clicking **Save to Quote**. The PDF name is the quote name plus a version number, such as *AcmeQuote\_V1*.

### 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

## Email Quote PDFs

Email quotes to your customers.

### IN THIS SECTION:

[Email Quote PDFs and Other Documents in Lightning Experience](#)

Make it easy for your customers to compare. Email one or more quote PDFs and other documents at the same time in Lightning Experience.

[Email a Quote PDF in Salesforce Classic](#)

Email a quote for your customer's approval in Salesforce Classic.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

## Email Quote PDFs and Other Documents in Lightning Experience

Make it easy for your customers to compare. Email one or more quote PDFs and other documents at the same time in Lightning Experience.

1. Click **Send Email** on a quote's activity timeline, or click **Email PDF** next to a quote in the Quote PDFs list view. An email task opens.
2. Enter the customer's email address, a subject, and body text.
3. Click **Attach file**, add quotes and other documents one at a time, and then send.

### EDITIONS

Available in: Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

## Email a Quote PDF in Salesforce Classic

Email a quote for your customer's approval in Salesforce Classic.

1. Click the email option on the PDF preview, on the quote detail page, or next to the PDF in the Quote PDFs related list. An email task opens with the current quote PDF attached.
2. Enter the customer's email address, a subject, and body text, and then send.

### EDITIONS

Available in: Salesforce Classic

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

## Considerations for Deleting Quotes

Before you delete a quote, it's a good idea to understand how deleting a quote affects quote-related PDFs and syncing with opportunities.

- If you have the appropriate permissions, and you're an admin, the quote owner, or someone above the quote owner in the organization role hierarchy, you can delete quotes.
- When you delete a quote, here's what happens. All related PDFs, notes, and attachments are deleted. If the quote is synced with an opportunity, the record is removed from the opportunity's Quotes related list. The deleted quote is moved to the Recycle Bin (Salesforce Classic only).
- If you undelete a previously synced quote, it's no longer synced with the opportunity.

### 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

## Considerations for Creating and Managing Quotes and Quote Line Items

Before you create a quote or work with quote line items, review a few key points.

-  **Note:** Your user permissions determine which tasks you can perform. See your Salesforce admin for help with any tasks that you can't perform on your own.
- Relevant price books, products, and [list prices](#) must be active in an opportunity before you can create a quote for the opportunity.
  - Professional, Enterprise, Performance, Unlimited, and Developer Edition orgs can activate record types and ask you to choose a `Record Type` when creating a quote. Record types determine the picklist values and business processes that are available when you create or edit a record.
  - If you use divisions (Salesforce Classic only), the division of a new quote is automatically set to the division of the related opportunity.
  - If a quote is synced with an opportunity, and you add a line item to the quote, the new line item is copied to the opportunity as a product in the Products related list.
  - If an opportunity is syncing with a quote, deleting the quote line item deletes the corresponding product from the opportunity's Products related list.
  - Custom field syncing isn't supported. When a quote is created from the API, the quote line items aren't created based on the opportunity line items. New opportunity line items are created based on the quote line items.
  - If a product has default schedules, the schedules aren't created when you add a line item to a quote. If the line item is copied from the opportunity, you can view the schedule from the opportunity. To change the schedule, edit the product record directly.
  - If you have a quote line item with a discount, and the product has a default schedule on the product record or an individual schedule on the opportunity product record, you can't edit the `Discount` field of the line item.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

## Considerations for Creating Quote PDFs

Before you create quote PDFs, consider a few key points.

- Quote PDFs don't support right-to-left languages. The text aligns to the left side of the page instead of the right.
- Text fields in a related list in a quote PDF are truncated to fewer than 256 characters. This limit occurs on rich text area fields, other types of text fields, standard fields, and custom fields.
- Your Salesforce admin determines which status is the default for new quotes and which statuses allow you to email a quote PDF. For example, your admin can prevent you from emailing a quote whose status is *In Review*.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

## How Quote Syncing Works

Quote syncing lets you link a quote to the opportunity that it was created from and synchronize all updates between the two records. An opportunity can have multiple quotes, but it can sync with only one quote at a time.

While a quote and an opportunity are synced, any addition or change to the list of products in one record syncs with the list of products in the other one. Adding or removing a line item from a quote updates the synced opportunity's Products related list. Adding or removing a product from the opportunity updates the synced quote's Quote Line Items related list. Product sorting also syncs between the two records. The quote and opportunity continue to sync each way until you stop syncing or delete one of the records.

You can sync quotes and opportunities that don't have any products. When you add a product to either record, it's automatically added to the record that it's synced to.

If an opportunity and a quote are synced, the opportunity identifies the synced quote in the following places.

- The Synced Quote field on the Opportunity detail page
- The Syncing checkbox in the Quotes related list

You can't edit the opportunity's Amount field, even if you stop syncing.

If you replace the synced quote with another synced quote, the existing opportunity line items are replaced by the newly synced quote records.

If you stop the sync between a quote and an opportunity, the link is broken and the records are no longer automatically updated with each other's changes.

### SEE ALSO:

[Sync Quotes and Opportunities](#)

[Troubleshooting Quote Syncing](#)

### 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

## Troubleshooting Quote Syncing

Errors can occur when you try to sync quotes under certain conditions. Review common error messages, and learn how to resolve them. If you don't have the appropriate permissions, contact your Salesforce admin.

### This quote can't be synced because it has inactive or archived products.

- If the product isn't active, edit the product and select the `Active` checkbox.
- If the product has been archived and the opportunity isn't closed, delete the product.

### This quote can't be synced because it has an inactive or archived price book.

- If the price book isn't active, edit the price book and select the `Active` checkbox.
- If the price book has been archived and the opportunity isn't closed, delete the price book.

### This quote can't be synced because it has inactive or archived list prices.

- If the list price isn't active, edit the list price and select the `Active` checkbox for the list price.
- If the list price has been archived and the opportunity isn't closed, delete the list price.

### 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

**This quote can't be synced because it has an inactive currency.**

Activate the currency from Setup by entering *Manage Currencies* in the *Quick Find* box, then selecting **Manage Currencies**.

**This quote can't be synced because one or more of the schedules for the opportunity products have changed since the quote was created.**

Create a different quote and sync it, or open the product, delete the schedule, and then re-create the schedule.

**This quote can't be synced because another quote that's being synced for this opportunity is locked due to a workflow approval process. Opportunities can only sync with one quote at a time.**

To unlock the other quote, finish the approval process or recall the request for approval.

**The SyncedQuote field is read only within a trigger.**

Determine whether your Salesforce org is using an Apex trigger that's attempting to modify the `SyncedQuote` field. The `SyncedQuote` field is read only and can't be modified with a trigger. An admin can modify the trigger.

## Contracts

A contract is a written agreement between parties. Many companies use contracts to define the terms for doing business with other companies. Use Salesforce to establish and document the contracts that you have with your accounts and opportunities. Track the contract through your approval process. And use workflow alerts to remind yourself of contract renewals.

### IN THIS SECTION:

#### [Guidelines for Creating Contracts](#)

When you create a contract, consider the type of information that's needed to maximize the quality of your data.

#### [Contract Fields](#)

Your page layout and field-level security settings determine which fields are visible and editable.

#### [Activate Contracts](#)

Activate a contract to indicate that it's in effect. An activated contract is read-only.

#### [Contract History](#)

Curious about the changes made to a contract during its lifecycle? View the Contract History related list on a contract's detail page.

#### [Delete Contracts](#)

To keep your data up-to-date, delete contracts that are no longer valid.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

## Guidelines for Creating Contracts

When you create a contract, consider the type of information that's needed to maximize the quality of your data.

- The start date (required)
- How long the contract will be in effect: the term in months (required)
- The end date

Some admins configure Salesforce to calculate the contract end date based on the contract start date and contract term. If the contract end date is calculated, it doesn't appear on the contract's edit page.

If you use divisions (Salesforce Classic only), the division of a new contract is set to the division of the related account.

SEE ALSO:

[Contract Fields](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

## Contract Fields

Your page layout and field-level security settings determine which fields are visible and editable.

A contract has the following fields, listed in alphabetical order.

Field	Description
Account Name	Name of the account associated with the contract.
Activated By	Name of the person who activated the contract.
Activated Date	Activation date of the contract.
Billing City	City portion of billing address. Up to 40 characters are allowed.
Billing Country	Country portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing State/Province	State or province portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing Street	Street address used for billing. Up to 255 characters are allowed in this field.
Billing Zip/Postal Code	Zip or postal code portion of billing address. Up to 20 characters are allowed.
Company Signed By	User at your company who authorized the contract.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

Field	Description
Company Signed Date	Date when the contract was authorized.
Contract Division	Division to which the contract belongs (Salesforce Classic only). This value is inherited from the related account. Available only in orgs that use divisions to segment data.
Contract End Date	Last day when the contract is in effect. Your admin can configure Salesforce to calculate the contract end date based on the contract start date and contract term. If this field is auto-calculated, it doesn't appear on the contract edit page.
Contract Name	Title for the contract that distinguishes it from other contracts.
Contract Number	Unique number assigned to the contract. Numbering for contracts starts at 100. (Read only.) Admins can modify the format and numbering for this auto-number field.
Contract Owner	User who owns the contract record.
Contract Start Date	First day when the contract is in effect.
Contract Term (months)	Number of months that the contract is in effect.
Created By	User who created the contract record.
Customer Signed By	Contact on the account that authorized the contract.
Customer Signed Date	Date when the contact signed the contract.
Customer Signed Title	Title of the contact who signed the contract.
Description	Statement describing the contract.
Last Modified By	User who most recently changed the contract record.
Owner Expiration Notice	Number of days before the contract end date when you want to send the notification, if the contract owner and account owner wants to be notified of an upcoming contract expiration.
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed.
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping State/Province	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed.
Shipping Zip/Postal Code	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed.

Field	Description
Special Terms	Any terms that you've agreed to and want to track in the contract.
Status	Stage that the contract has reached in the contract business process. Your admin can add values to this picklist within three system-defined contract status categories: Draft, In Approval Process, and Activated. You can use these status categories to track contracts within your business process using reports and views.
Custom Links	List of custom links for contracts set up by your admin.

## SEE ALSO:

[Guidelines for Creating Contracts](#)

## Activate Contracts

Activate a contract to indicate that it's in effect. An activated contract is read-only.

Open a contract, and then click **Activate**.

### USER PERMISSIONS

To activate contracts:

- Activate Contracts
- AND
- Read and Edit on contracts

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud



## Contract History

Curious about the changes made to a contract during its lifecycle? View the Contract History related list on a contract's detail page.

Here's how it works. When someone modifies a standard or custom field whose history is tracked on a contract, an entry is added to the Contract History related list. Entries show the date, time, nature of the change, and who made the change. (Changes to the contract's related lists aren't tracked here.)

The default is to track changes for contracts with a status of In Approval Process or Activated. To track changes for contracts with any status, ask your Salesforce admin to Customize Contracts.

To report on activated contracts whose fields are tracked, choose **Contract History** under Contracts and Orders in the Reports area.

If you're using Lightning Experience, switch to Salesforce Classic to see Contract History.

## Delete Contracts

To keep your data up-to-date, delete contracts that are no longer valid.

You delete a contract on the contracts list view or a contract's detail page.

When you delete a contract:

- It's moved to the Recycle Bin (Salesforce Classic only).
- All related orders, notes, attachments, events, tasks, history, and approval requests are deleted. (Associated accounts aren't deleted.) If you undelete the contract (Salesforce Classic only), the related items are restored.

### EDITIONS

Available in: Salesforce Classic

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

### USER PERMISSIONS

To delete inactivated contracts:

- Delete on contracts
- AND
- Read on accounts

To delete activated contracts:

- Delete Activated Contracts
- AND
- Read on accounts

# Managing and Tracking Customer Orders

## Orders

Use orders to track your customers' requests for products and services.

An *order* is an agreement between a company and a customer to provision services or deliver products with a known quantity, price, and date. Your Salesforce admin determines whether you add orders to contracts or accounts.

For example, an Internet service provider probably requires customers to commit to a year of service. That company requires contracts as a reference for every order. But a company that sells clothing probably sells products in a single transaction. That company associates each order with an account.

### IN THIS SECTION:

#### [Guidelines for Creating Orders](#)

When you're creating orders, make sure that you follow key guidelines.

#### [Editing and Deletion Limitations for Orders and Reduction Orders](#)

Some fields aren't editable after an order is created. Others aren't editable after an order has been reduced.

#### [Considerations for Activation Limitations](#)

Protect the integrity of your order data with activation limitations for orders and reduction orders.

#### [Share Orders](#)

Your Salesforce admin defines your company's default sharing model. You can change this model to extend sharing to more users than the default allows. You can't change the sharing model to make it more restrictive than the default.

#### [Order History](#)

Track changes to an order, such as when the status is modified, on its detail page by using the Order History related list.

#### [Order Fields](#)

Your page layout and field-level security settings determine which fields are visible and editable.

### SEE ALSO:

#### [Reduction Orders](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To view the Orders tab:

- Read on orders

To view orders:

- Read on orders

## Guidelines for Creating Orders

When you're creating orders, make sure that you follow key guidelines.

- Associate each order with an account and optionally with a contract, depending on your Salesforce admin's settings.
- You can create an order from the Orders tab and then manually add the associated account and contract. But if you create an order directly on an account or contract via its Orders related list, no extra step is required. The order is associated with that record.
- To create an order with the same details as another order, you can clone it. (If you're using Lightning Experience, when you clone an order with products, the products aren't cloned. Clone the order, and then add products as needed to the new order.)
- If you clone an order with products, you can't change the new order's currency or price book.

SEE ALSO:

[Add Products to an Order](#)  
[Orders](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To create an order from the Orders tab:

- Create on orders

To create an order on a contract:


- Create on orders AND Read on contracts

To create an order on an account:

- Create on orders AND Read on accounts

## Editing and Deletion Limitations for Orders and Reduction Orders

Some fields aren't editable after an order is created. Others aren't editable after an order has been reduced.

- In Salesforce Classic, you can't edit the status category of an order or reduction order from Draft to Activated or vice versa. The status field is updated based on other processes. For example, when you click **Activate**, the status category is changed from Draft to Activated. The status picklist values sometimes differ depending on your Salesforce admin's settings.
  - In Lightning Experience, Status picklist values aren't filtered based on an order's status, so all status values appear in the picklist.
  - After an order is created, you can change its `Account` field only when the following conditions are true.
    - The order is in Draft status.
    - If the order has an associated contract, that contract is associated with the new account.
  - After an order is created, you can change its `Contract` field only when the following conditions are true.
    - The order is in Draft status.
    - The account associated with the order is the same as the account associated with the new contract.
    - The currency associated with the order is the same as the currency associated with the new contract.
    - If the order has an associated price book, that price book is associated with the new contract.
  - After a price book is assigned to an order, you can't change or remove the price book assignment.
  - If an order has an associated reduction order, you can't edit the order's end date.
  - Before you delete an activated order or reduction order, deactivate it. And before you deactivate the order, deactivate and delete any associated reduction orders.
  - Only the order owners, account owners, contract owners, and Salesforce admins can delete related orders.
-  **Note:** When you delete a contract, all related orders, notes, attachments, events, tasks, history, and approval requests are deleted. Associated accounts aren't deleted with the contract. The deleted contract is moved to the Recycle Bin (Salesforce Classic only). If you undelete the contract, its related items are also restored.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To edit an order or reduction order:

- Edit on orders

To edit an activated order or reduction order:

- Edit Activated Orders

To delete an order or reduction order:

- Delete on orders

### SEE ALSO:

[Reduction Orders](#)

[Guidelines for Creating Orders](#)

[Orders](#)

## Considerations for Activation Limitations

Protect the integrity of your order data with activation limitations for orders and reduction orders.

- You can activate orders for active contracts but not for inactive contracts.
- You can activate orders only if they include order products.
- You can activate reduction orders for order products only if they result in positive quantities.
- After you activate an order or reduction order, you can modify order products. You can't add or remove them.
- Before you can deactivate an order that has reduction orders, you must deactivate and delete its reduction orders.

### SEE ALSO:

[Orders](#)

[Reduction Orders](#)

## Share Orders

Your Salesforce admin defines your company's default sharing model. You can change this model to extend sharing to more users than the default allows. You can't change the sharing model to make it more restrictive than the default.

1. To view and manage sharing details, click **Sharing** on the order detail page.

The Sharing Detail page lists the users, groups, roles, and territories that have sharing access to the order. The Sharing button isn't available when the organization-wide default for orders is controlled by the parent.

2. To grant access to the record for other users, groups, roles, or territories, click **Add**.



**Note:** You can share orders only with people who have "Read" permission on orders.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To activate orders:

- Activate Orders

To deactivate orders and reduction orders:

- Edit Activated Orders

### EDITIONS

Available in: Salesforce Classic

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

## Order History

Track changes to an order, such as when the status is modified, on its detail page by using the Order History related list.

When someone modifies a standard or custom field, an entry is added to the Order History related list (available in Salesforce Classic only), regardless of the order's status. All entries include the date, the time, the nature of the change, and who made the change. Modifications to the related lists on the order aren't tracked in the order history.

SEE ALSO:

- [Orders](#)
- [Reduction Orders](#)

## Order Fields

Your page layout and field-level security settings determine which fields are visible and editable. Orders and reduction orders have the following fields.

Field	Description
Account Name	Name of the account associated with the order. (Read-only for reduction orders.)
Account Number	Unique number automatically assigned to the account associated with the order. (Read-only for reduction orders.)
Activated By	Name of the user who activated the order. (Read-only.)
Activated Date	Date when the order was activated.
Billing City	City portion of billing address. Up to 40 characters are allowed.
Billing Country	Country portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing State/Province	State or province portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing Street	Street address used for billing. Up to 255 characters are allowed.
Billing Zip/Postal Code	Zip or postal code portion of billing address. Up to 20 characters are allowed.
Bill To Contact	Contact to whom the order is billed.

### EDITIONS

Available in: Salesforce Classic

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

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Field	Description
Company Authorized By	User at your company who authorized the order.
Company Authorized Date	Date when the order was authorized.
Contract End Date	Last day when the contract is in effect. (Read-only.)
Contract Name	Title for the parent contract that distinguishes it from other contracts. (Read-only.)
Contract Number	Unique number automatically assigned to the contract. Numbering for contracts starts at 100. (Read-only for reduction orders.)
Created By	User who created the order record. (Read-only.)
Currency	Default currency for all currency amount fields in the order. (Read-only for reduction orders.)
Customer Authorized By	Contact on the order's account who authorized the order.
Customer Authorized Date	Date when the contact authorized the order.
Description	Description of the order.
Last Modified By	User who most recently changed the order record.
Opportunity	Opportunity that's associated with the order.
Order Amount	Total amount of the order.
Order End Date	Date when the order ends.
Order Name	Title for the order that distinguishes it from other orders.
Order Number	Unique number automatically assigned to the order. Numbering for orders starts at 100. (Read-only.)
Order Record Type	Record type assigned to this order.
Order Reference Number	Reference number assigned to this order.
Order Start Date	Date when the order becomes effective.
Order Type	Type of order. Entry is selected from a picklist of available values, which a Salesforce admin sets. Each picklist value can have up to 40 characters.
Original Order	For reduction orders only. Prepopulated with the ID of the parent order when you create a reduction order by clicking <b>Reduce Order</b> .
Owner	Owner of the order. Can be a user or queue. Order owners have full access to their orders regardless of their account access.
PO Date	Date when a purchase order was entered.
PO Number	Number of the purchase order.

Field	Description
Quote	Quote that's associated with the order.
Reduction Order	If selected, the order record represents a reduction order. Automatically selected when you create a reduction order by clicking <b>Reduce Order</b> . (Read-only.)
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed.
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping State/Province	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed.
Shipping Zip/Postal Code	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed.
Ship To Contact	Contact to whom the order is shipped.
Status	<p>Indication of the stage that the order has reached in the order business process.</p> <p>You can add values to this picklist within two system-defined order status categories: Draft and Activated. You can use these status categories to track orders within your business process using reports and views. Some user permissions apply specifically to draft statuses. Others apply specifically to activated statuses.</p>

## SEE ALSO:

[Orders](#)[Reduction Orders](#)[Order Product Fields](#)



## Order Products

An *order product* is a product or service that's provided to a customer according to an associated order.

All order products in an order are associated with a price book. The Order Products related list on an order indicates in parentheses which price book the order is associated with. For example, if the Government price book is associated with your order products, the related list is titled Order Products (Government).

A *reduction order product* is a product or service to be returned, reduced, deprovisioned, or disabled according to an associated reduction order. Each reduction order product is directly associated with an order product.

### IN THIS SECTION:

[Add Products to an Order](#)

Track what you're selling by adding products to your customers' order records.

[Editing and Deletion Limitations for Order Products](#)

Depending on whether the parent order has been activated or reduced, limitations for when you can edit or delete order products can apply.

[Order Product Fields](#)

Your page layout and field-level security settings determine which fields are visible and editable.

### SEE ALSO:

[Add Products to a Reduction Order](#)

[Orders](#)

[Reduction Orders](#)

## Add Products to an Order

Track what you're selling by adding products to your customers' order records.



### Note:

- You can use only one price book per order.
- You can add order products to draft orders only.

1. Open the order that you want to add products to.
2. In the Order Products related list, click the button for adding products.
3. If a price book isn't selected for this order, select the price book that you want to use, and then save your changes.
4. Select the products to add to your order.
5. Enter a quantity and unit price for each order product.
6. Add line descriptions if needed.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To add products to an order:

- Edit on orders

7. Save your changes.

**SEE ALSO:**[Editing and Deletion Limitations for Orders and Reduction Orders](#)[Considerations for Activation Limitations](#)[Order Products](#)[Orders](#)

## Editing and Deletion Limitations for Order Products

Depending on whether the parent order has been activated or reduced, limitations for when you can edit or delete order products can apply.

- If an order or reduction order has been activated, you can't delete its order products. But you can still edit an order product's fields.
- After an order product has been reduced, you can no longer edit or delete the order product in that order.

**SEE ALSO:**[Add Products to an Order](#)[Add Products to a Reduction Order](#)[Order Products](#)[Reduction Orders](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To edit an order product on a draft order or reduction order:

- Edit on order products

To delete an order product on a draft order or reduction order:

- Delete on order products

To edit order products on an activated order or reduction order:

- Edit Activated Orders

## Order Product Fields

Your page layout and field-level security settings determine which fields are visible and editable. Order products and reduction order products have the following fields.

Field	Description
Available Quantity	Number of units available to be reduced. When a reduction order is activated, an order product's available quantity is updated to reflect the quantity of relevant reduction order products.  Value must be greater than or equal to 0. (Read-only.)
Created By	User who created the order product record. (Read-only.)
End Date	End date for the order product.
Last Modified By	User who most recently changed the order record.
Line Description	Description for this order product record.
List Price	Default price set by the price book on the parent order. (Read-only.)
Order	Parent order for this order product.
Order Product Number	Automatically generated number that identifies the order product record. (Read-only.)
Original Order Product	Number that identifies the order product being reduced. Required if the order product is reducing another order product. (Read-only.)
Product	Name of the product used in this order product record. (Read-only.)
Product Code	Internal code or product number used to identify the product. (Read-only.)
Quantity	Quantity of units of the product.
Quote Line Item	Quote line item that's associated with the order product. The quote line item's quote must match the quote that's associated with the order product's parent order.
Start Date	Start date for the order product.
Total Price	Quantity of the order product multiplied by the unit price.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduction orders available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

Field	Description
Unit Price	Unit price for the order product.

## SEE ALSO:

[Order Products](#)[Order Fields](#)

## Reduction Orders

Use reduction orders to track requests to reduce, return, deactivate, or disable a customer's products or services.

A *reduction order* is an agreement between a company and a customer to process product returns, dep provision services, or reduce services that have been provisioned. For example, if a customer has purchased 30 items through an order and then requests to cancel that order, you can create a reduction order to track the request.

You can create multiple reduction orders for a single order, but you can't create a single reduction order for multiple orders. For example, to reduce order products that were purchased through three activated orders, you create three reduction orders—one for each original order—even if all those orders are for the same account.

## IN THIS SECTION:

[Reduce Orders](#)

If your company accepts returns or reductions on activated orders, you can reduce the relevant orders to reflect those exchanges of goods and services.

[Add Products to a Reduction Order](#)

After creating a reduction order, indicate which products need to be reduced and the quantities to reduce those products.

## SEE ALSO:

[Considerations for Activation Limitations](#)[Editing and Deletion Limitations for Orders and Reduction Orders](#)[Order Fields](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in:  
**Professional, Enterprise, Performance, Unlimited,**  
and **Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited,**  
and **Developer** Editions

## Reduce Orders

If your company accepts returns or reductions on activated orders, you can reduce the relevant orders to reflect those exchanges of goods and services.

### Note:

- If you're using Lightning Experience, you can't create reduction orders. Switch to Salesforce Classic.
- You can reduce activated orders only.
- You can apply a reduction order toward one order only. To reduce order products across multiple orders, create a reduction order for each original order.

1. Go to the detail page of the order that you're reducing.
2. Click **Reduce Order**.
3. Enter the details for the reduction order, and then save your changes.
4. Add products to indicate which order products on the original order need to be reduced.

### SEE ALSO:

[Add Products to a Reduction Order](#)  
[Considerations for Activation Limitations](#)  
[Order Fields](#)  
[Order Product Fields](#)

## Add Products to a Reduction Order

After creating a reduction order, indicate which products need to be reduced and the quantities to reduce those products.

### Note:

- If you're using Lightning Experience, you can't create reduction orders. Switch to Salesforce Classic.
- An order product is reducible only if its Available Quantity is greater than zero. You can partially reduce a product, but you can't reduce it to less than zero.
- You can reduce up to 200 order products in one reduction order.

1. Open the reduction order that you want to add products to, or [reduce an existing order](#) to create a reduction order.
2. In the Order Products related list, click **Select Products to Reduce**.
3. In the Quantity to Reduce column, enter the number of units to reduce each order product's quantity.
  - To fully reduce an order product, enter the same number in Quantity to Reduce as appears in Available Quantity.
  - If you don't want to reduce an item, leave the Quantity to Reduce blank.

For example, if the original order included 3,000 coffee sleeves, and your customer needs only 2,000, enter *1000* in the Quantity to Reduce column.

### EDITIONS

Available in: Salesforce Classic

Orders are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To reduce an order:

- Create Reduction Orders

### EDITIONS

Available in: Salesforce Classic

Orders are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To add order products to a reduction order:

- Edit on orders

4. Save your changes.

SEE ALSO:

[Reduction Orders](#)

[Order Products](#)

[Editing and Deletion Limitations for Order Products](#)

## Forecasting Sales

### Predicting and Planning Sales Cycles with Collaborative Forecasts

#### Collaborative Forecasts

Collaborative Forecasts makes it easy to predict sales revenue and quantities.



**Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

IN THIS SECTION:

[Collaborative Forecasts Concepts](#)

Predict sales revenue and quantities from your opportunity pipeline, and incorporate product families, opportunity splits, and custom opportunity currency fields if needed.

[Guidelines for Using Collaborative Forecasts](#)

Review key guidelines to make sure that you get the most out of Collaborative Forecasts.

[Collaborative Forecasts Elements](#)

Collaborative Forecasts lets you find and communicate opportunity and forecast information easily. If you're using Collaborative Forecasts, make sure that you learn about the elements that comprise a forecast.

[Monthly and Quarterly Forecasts](#)

The Collaborative Forecasts rollup table displays forecast amounts for individual months or quarters and a range of months or quarters, depending on your Collaborative Forecasts settings. Six months or four quarters is the default. Your admin can also enable custom periods.

[Forecast Hierarchy](#)

The forecast hierarchy in Collaborative Forecasts is a nested, expandable list of forecast users that determines how forecasts roll up within your company and who can view and adjust them. The forecasts hierarchy is based on the role hierarchy and specifies which users are forecast managers.

[Partner Portal User Opportunities in Collaborative Forecasts](#)

Partner portal users are external to your Salesforce org but sell your products and services through indirect sales channels. Your partner portal users use a portal to log in to Salesforce. Partners can create opportunities, and users can assign opportunities to them.

[Guidelines for Using Multiple Currencies in Collaborative Forecasts](#)

If your company uses forecasts and multiple currencies, your Salesforce admin chooses a forecast currency and enables forecast types. The forecast currency is your corporate currency or each forecast owner's personal currency.

#### 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


### Guidelines for Using Forecasting Reports

When using Collaborative Forecasts, review guidelines for how to get the most from forecasting reports.

## Collaborative Forecasts Concepts

Predict sales revenue and quantities from your opportunity pipeline, and incorporate product families, opportunity splits, and custom opportunity currency fields if needed.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Use Collaborative Forecasts to manage sales expectations and to predict and plan your company's sales cycle from pipeline to closed sales. A forecast is an expression of expected sales revenue based on the gross rollup of a set of opportunities. The forecast amounts on the forecasts page are totals and subtotals of the opportunities in the four forecast categories—Pipeline, Best Case, Commit, and Closed. Depending on how Salesforce is set up, these amounts can reflect opportunities from one or multiple forecast categories. On the forecasts page, roll over the  (Salesforce Classic only) next to the column names to see which forecast categories roll up to the totals in each column. In the rollup table on the forecasts page, forecast amounts are organized by forecast rollup, time period, and optionally by product family. Forecasts can include adjustments made by forecast managers to their immediate subordinates' forecasts and adjustments made by forecast users to their own forecast amounts.

Your admin can enable up to four types of forecasts that you can switch between. Each type of forecast stores its own quota and adjustment data.

Users can view forecast amounts and their related opportunities by forecast rollup for an individual or for everyone below them in the forecast hierarchy. For example, they can see the July Best Case forecast for all the sales managers who report to them, all the sales reps who report to any one of their managers, or just one individual. Users can also adjust their own forecasts and the forecasts of subordinates one level below. The user interface makes all these tasks simple.

- Conduct status calls with an opportunity team.
- Select and view forecasts using an interactive, expandable table.
- See forecast summary information for single months or quarters and a multimonth or quarter range for each forecast rollup.
- If you use product families, see forecast summaries for each product family. (If you're using Lightning Experience, your admin chooses the product families that you can forecast on.)
- If you use opportunity splits, see the split percentages and amounts that contribute to each forecast (Salesforce Classic only).
- View and use the list of opportunities related to each forecast amount that you select. Access opportunity details directly from this list.
- Hover over a column boundary and click to adjust the width to view data more easily (Salesforce Classic only).
- Make adjustments and view adjustment details, such as the original forecast amount and who made the adjustment. If multiple types of forecasts are enabled, each forecast type maintains separate adjustments.
- If you're a forecast manager, move up and down through the forecasts hierarchy easily.
- View revenue- or quantity-based forecasts.
- View forecasts in multiple currencies.
- View quota information on each user's forecast page. If multiple types of forecasts are enabled, each forecast type maintains separate quota information.
- Use Collaborative Forecasts reports.

### 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

- Include the opportunities of your partner portal users in your forecasts.

SEE ALSO:

[What's the difference between the Forecasting versions?](#)

## Guidelines for Using Collaborative Forecasts

Review key guidelines to make sure that you get the most out of Collaborative Forecasts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

### General Guidelines

- Track important details at the opportunity level.
- Measure everything related to potential deals—activities such as emails, meetings, and outreach—to determine their contributions to revenue.
- Create actionable tasks with next steps and completion dates pertaining to opportunities.
- Map your sales stages to forecast categories. Adjust close probability based on historical data to increase your forecast accuracy.
- When adjusting forecasts, have conversations with your subordinates so that they understand your expectations.
- Because opportunities can change frequently, revisit forecast adjustments weekly to avoid out-of-date adjustments.
- To ensure that the forecast visibility rolls up to every level of the hierarchy, designate each sales manager with subordinates as a forecast manager in your forecast hierarchy.
- Customize your forecast category names to match your business process and terminology.

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### Navigating Forecast Information

- To view or adjust a subordinate's forecasts, click **Jump to** (Salesforce Classic only), begin typing up to 20 characters in the text box that appears, and then select the subordinate's name.

 **Note:** Only forecast managers who have Collaborative Forecasts users reporting to them in the forecast hierarchy can see "Jump to."

- To expand a row on the forecasts page, click it.
- Hover over a name to display the **Details** link. Navigation links with the names of forecast managers appear at the top of the page as you drill down through the forecast hierarchy. Click these links to quickly move through the hierarchy.

### Viewing Forecast Information

- Keep your window sized to 1,024 pixels or greater.
- Because of the format and amount of information in the forecast rollup table, working with forecasts in mobile browsers can be difficult.
- If you have multiple forecast types enabled, select which of them to view by clicking the name of the forecast in the gear (Lightning Experience) or upper-right dropdown list (Salesforce Classic) on the forecasts page and then choosing a different type from the menu.
- Run reports to analyze trends and check performance.



- Create dashboards for metrics of all activities related to potential sales.

## Collaborating with Chatter

- Use Chatter to share opportunity and forecast information with your team and bring attention to important details.
- If Chatter is enabled and you're a forecast manager, hover over a subordinate's name and click **Chat Now** to display Chatter options such as Follow or Send a message.


## SEE ALSO:

[Collaborative Forecasts Concepts](#)

[Guidelines for Using Forecasting Reports](#)

## Collaborative Forecasts Elements

Collaborative Forecasts lets you find and communicate opportunity and forecast information easily. If you're using Collaborative Forecasts, make sure that you learn about the elements that comprise a forecast.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

### Adjustment

A layer of detail that you can add to a forecast amount. An adjustment shows forecast managers' or sales reps' judgment about the final amount that they expect a forecast's opportunities to bring in at the close of the forecast period. Some forecast managers need to adjust their own or a subordinate's forecast. For example, they know that some employees tend to be too optimistic or too conservative when assigning amounts to opportunities. Sales reps can also adjust their own forecasts if they think that opportunity amounts are understated or overstated. Forecast managers can adjust forecasts that include only gross opportunity amounts and forecasts that have adjustments made by someone else in their opportunity team. An adjustment doesn't change the underlying gross rollup amount—it just adds a layer of detail. If multiple types of forecasts are enabled, each forecast type maintains separate adjustments.

Forecast managers can adjust their own Commit and Best Case forecasts and the forecasts of subordinates one level below them in the forecast hierarchy. They can view adjustments that subordinates make at every level below them in the forecast hierarchy. Adjustments made to their subordinates' forecasts roll up into their own forecasts. When you adjust, you can include an explanatory note. Adjustment notes don't appear in reports.

### Amount Without Adjustments

The sum of a person's owned revenue opportunities and the person's subordinates' opportunities, without adjustments. Subordinates include everyone reporting up to a person in the forecast hierarchy. This amount is visible only on reports.

### Amount Without Manager Adjustments

The forecast number as seen by the forecast owner. This is the sum of the owner's revenue opportunities and the owner's subordinates' opportunities, including adjustments made by the forecast owner on the owner's or subordinates' forecasts. It doesn't include adjustments made by forecast managers above the owner in the forecast hierarchy.

### Corporate Currency

The currency in which your corporate headquarters reports revenue and the basis for all currency conversions.

### Forecast


An expression of expected sales revenue based on the gross rollup of a set of opportunities. The forecast amounts on the forecasts page are totals and subtotals of the opportunities in the four forecast categories—Pipeline, Best Case, Commit, and Closed. Depending

## EDITIONS

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Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

on how Salesforce is set up, these amounts can reflect opportunities from one or multiple forecast categories. On the forecasts page, roll over the  (Salesforce Classic only) next to the column names to see which forecast categories roll up to the totals in each column.

In the rollup table on the forecasts page, forecast amounts are organized by forecast rollup, time period, and optionally by product family. Forecasts can include adjustments made by forecast managers to their immediate subordinates' forecasts and adjustments made by forecast users to their own forecast amounts.

Here you can view forecasts and related opportunities by forecast category for everyone below you in the forecast hierarchy or just one person. For example, you can see the July Best Case forecast for all the sales managers who report to you, all the sales reps who report to any one of your managers, or just one individual.

**Forecast Amount**

The revenue forecast from the forecast manager's perspective and the sum of the owner's and subordinates' opportunities, including all forecast adjustments.

**Forecast Category**

The category within the sales cycle 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.

**Forecast Currency**

Your corporate currency or each forecast owner's personal currency.

**Forecast Display Currency**

The currency that you select to display forecasts in. The selection must be an enabled currency and is made directly from the forecasts page.

**Forecast Hierarchy**

A nested, expandable list of forecast users that determines how forecasts roll up within your company and who can view and adjust them. The forecasts hierarchy is based on the role hierarchy and specifies which users are forecast managers. When Collaborative Forecasts is enabled for you, a forecasts hierarchy is generated based on your role hierarchy, but sometimes you need to add or remove managers, sales reps, or other users.

**Forecast Owner**

A forecast-enabled user who owns opportunities or is a forecast manager in the forecast hierarchy. Forecast managers can have their own opportunities.

**Forecast Quantity**

The quantity forecast from the forecast manager's perspective and the sum of the owner's and subordinates' opportunities, including all forecast adjustments.

**Forecast Range**

The date range that you want displayed in your forecast. Depending on your settings, the range can include months or quarters.

**Forecast Type**

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 has its own measurement: revenue or quantity. To use both, enable a separate forecast type for each. Salesforce admins can enable up to four forecast types. You can't use quantity forecasts with opportunity splits or custom opportunity field forecasts.

- 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.

**Gross Rollup**

An expression of expected sales revenue based on the gross value of a set of opportunities. A forecast always includes a gross rollup amount and can also include adjustments.

**Opportunities**

The sales and pending deals that you want to track.

**Opportunity Splits**

Sharing credit across an opportunity team. If your forecast data source is opportunity splits, you can see the split information on the forecasts page (in Salesforce Classic only).

**Opportunity Stage**

The current stage of an opportunity, such as Prospect or Proposal. Opportunity stage values correlate with forecast category values to determine how the opportunity contributes to a forecast.

**Owner Only Amount**

The sum of a person's revenue opportunities, without adjustments.

**Owner Only Quantity**

The sum of a person's quantity opportunities, without adjustments.

**Personal Currency**

A user's default currency for quotas, certain forecasting versions, and reports. This currency must be one of your active currencies in Salesforce. Your quota amounts appear in your display currency.

**Product Family**

A way to categorize your products. For example, if your company sells hardware and software, you can create two product families: Hardware and Software.

**Quantity Without Adjustments**

The sum of a person's owned quantity opportunities and also his or her subordinates' opportunities, without adjustments. Subordinates include everyone reporting up to a person in the forecast hierarchy.

**Quantity Without Manager Adjustments**

The forecast number as seen by the forecast owner. This is the sum of the owner's quantity opportunities and subordinates' opportunities, including adjustments made on the subordinates' forecasts. It doesn't include adjustments made by forecast managers above the owner in the forecast hierarchy.

**Quota**

The 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 you have multiple types of forecasts enabled, each type maintains separate quota information.

**Revenue**

The total expected revenue from the opportunities that fit in a given category.

**Rollup Table**

The table at the top of the forecasts page. The opportunities list at the bottom of the forecasts page corresponds dynamically with selections on the rollup table.

### Subordinate

A Collaborative Forecasts user below you in the forecast hierarchy. You can view all your subordinates' forecasts. If you enable adjustments, you can view all your subordinates' adjustment information and adjust the forecasts of subordinates one level below you in the hierarchy. Forecast amounts and adjustments roll up into the forecasts on your forecasts page.

#### SEE ALSO:

[Collaborative Forecasts Concepts](#)

## Monthly and Quarterly Forecasts

The Collaborative Forecasts rollup table displays forecast amounts for individual months or quarters and a range of months or quarters, depending on your Collaborative Forecasts settings. Six months or four quarters is the default. Your admin can also enable custom periods.



**Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Depending on your Collaborative Forecasts period settings, you can forecast up to 12 months or eight quarters in the future or past. If your forecast range includes the current month or quarter, the forecasts page displays the current month or quarter. Otherwise, the first month or quarter of the range is selected. Regardless of whether your company uses monthly or quarterly forecasts, forecast managers can use quotas and adjust their subordinates' forecasts. Quota and adjustment periods are based on the period settings.

The forecast date range becomes the default for all Collaborative Forecasts users. Users can use this default or set a different date range display for their own forecasts. After users change their individual forecast date range displays, 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.

#### SEE ALSO:

[Change Your Forecast Date Range Display](#)  
[Collaborative Forecasts Concepts](#)

### 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

## Forecast Hierarchy

The forecast hierarchy in Collaborative Forecasts is a nested, expandable list of forecast users that determines how forecasts roll up within your company and who can view and adjust them. The forecasts hierarchy is based on the role hierarchy and specifies which users are forecast managers.



**Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Based on your role, you can be added to or removed from the forecast hierarchy. And your position within the hierarchy can change. For example, some sales reps with no direct reports can view only their own forecasts. However, if they become sales managers, they're added to the forecast hierarchy as forecast managers.

People designated as forecast managers can view the forecasts and opportunities of users, including partner portal users, below them in the forecast hierarchy. Forecast managers can also adjust the forecasts of direct reports. Only managers who adjust and people above them in the hierarchy can view the adjustment.

Not everyone can view the chart that displays your team's forecast hierarchy. If you have questions about your forecast hierarchy, see your admin or forecast manager.

### SEE ALSO:

[Adjusting Forecasts in Collaborative Forecasts](#)

[Guidelines for Using Collaborative Forecasts](#)

## Partner Portal User Opportunities in Collaborative Forecasts

Partner portal users are external to your Salesforce org but sell your products and services through indirect sales channels. Your partner portal users use a portal to log in to Salesforce. Partners can create opportunities, and users can assign opportunities to them.



**Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Opportunities that a partner portal user creates can roll up to the forecast of the account owner. The account owner must be the person's forecast manager in the forecast hierarchy for the opportunities to roll up into the forecast. For example:

- Gordon Johnson owns a partner account called Acme.
- Gordon has an Acme contact named Anne Smith.
- Anne is a partner portal user.
- Anne reports to Gordon in the forecast hierarchy.

If Anne adds opportunities in her portal, Gordon sees those opportunities in his forecast. Because Gordon is Anne's forecast manager, he can adjust forecast amounts based on her opportunities and see how she's tracking against her quota.

### SEE ALSO:

[Guidelines for Viewing Opportunity Details from a Forecast](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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### EDITIONS

Available in: Salesforce Classic

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

## Guidelines for Using Multiple Currencies in Collaborative Forecasts

If your company uses forecasts and multiple currencies, your Salesforce admin chooses a forecast currency and enables forecast types. The forecast currency is your corporate currency or each forecast owner's personal currency.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

- When you use Collaborative Forecasts, you select a *display currency*, which can be any currency that's enabled in Salesforce. To change the currency, select a different currency from the gear (Lightning Experience) or the dropdown list (Salesforce Classic) in the upper right of the forecasts page.
- If you use revenue-based forecasts, when currency rates change, opportunities and adjustments roll up with the changed value along with values in the forecast table.
- If you use quantity-based forecasts, when currency rates change, opportunities and adjustments roll up with the changed value.
- The processing indicator (🕒) appears as changed values roll up (Salesforce Classic only).
- Rate changes impact all forecast periods (historical, current, and future).
- Deactivating a currency that's set as a user's personal currency resets the user's currency to the corporate currency.
- To edit your personal currency settings, edit your personal information.

### SEE ALSO:

[Adjusting Forecasts in Collaborative Forecasts](#)  
[Collaborative Forecasts Elements](#)  
[Change Between Forecast Types](#)

### EDITIONS


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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

### Guidelines for Using Forecasting Reports

When using Collaborative Forecasts, review guidelines for how to get the most from forecasting reports.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

- To determine whether forecasting reports are available, go to the Reports tab, and then click **New Report**. Select the folder in which your Salesforce admin has placed the forecasting report types. If you don't see the fields or report type names described in this table, check with your admin.
- If reports that use a specific forecast type don't run, that forecast type was likely deleted. Check with your admin.
- Reports contain the latest information at the time when you run the report. If changes are in progress while the report is running, you might see a difference between your report amounts and the forecasts page.
- The data that you see in reports depends on what you can view in Collaborative Forecasts. For example, forecast managers can view adjustments, but someone who's not a forecast manager running a similar report doesn't see the adjusted amounts in reports. A forecast amount can consist of a rollup of many users' forecast amounts, so examine report results closely when using summary fields.

Report Element	How to See It
A forecast summary from a specific user's perspective.	Create a Forecasting Item report and add a filter using Owner: Full Name. Filter by a specific person's name.
The sum of a person's revenue opportunities, without adjustments.	Add Owner Only Amount to your Forecasting Item report. For example, if you own two opportunities, each worth \$10,000, the Owner Only Amount is \$20,000. To view the same information for quantity, add Owner Only Quantity to the report.
The sum of a person's owned revenue opportunities and the person's subordinates' opportunities, without adjustments. Subordinates include everyone reporting up to a person in the forecast hierarchy. This amount is visible only on reports.	Add Amount Without Adjustments to your Forecasting Item report. For example, if the sum of the amount of all opportunities owned by you is \$20,000, and the sum of the amount of your subordinates' opportunities is \$55,000, the Amount Without Adjustments is \$75,000. To view the same information for quantity, add Quantity Without Adjustments to the report.
The forecast number as seen by the forecast owner. This is the sum of the owner's revenue opportunities and the owner's subordinates' opportunities, including adjustments made by the forecast owner on the owner's or subordinates' forecasts. It doesn't include	Add Amount Without Manager Adjustments to your Forecasting Item report. For example, Anne has an Amount Without Adjustments of \$75,000, made up of \$20,000 of her own opportunities and \$55,000 of opportunities owned by Ben, her subordinate. She adjusts Ben's amount to \$65,000 for a total of \$85,000. If you adjust

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USER PERMISSIONS

To use Forecasts:

- Allow Forecasting

To view the Reports tab:

- Run Reports

To create, edit, and delete reports:

- Create and Customize Reports

AND

- Report Builder

Report Element	How to See It
adjustments made by forecast managers above the owner in the forecast hierarchy.	Anne's number from \$85,000 to \$100,000, you see \$85,000 in Amount Without Manager Adjustments, because Anne sees this amount (and Anne can't see your adjustments because you're her manager). To see the amount that includes your adjustment to \$100,000, look at Forecast Amount. To view the same information for quantity, add Quantity Without Manager Adjustments to the report.
The revenue forecast from the forecast manager's perspective and the sum of the owner's and subordinates' opportunities, including all forecast adjustments.	Add Forecast Amount to your Forecasting Item report. For example, you're a forecast manager and have another forecast manager reporting to you who has an Amount Without Manager Adjustment totaling \$85,000. If you adjust the forecast to \$100,000, the Forecast Amount is \$100,000. To view the same information for quantity, add Forecast Quantity to the report.
Whose forecast amounts have adjustments made to them.	Add Has Adjustment to your Forecasting Item report. For example, if you make a manager adjustment to one of your subordinate's forecast amounts, this checkbox is selected. If your subordinate adjusts one of his or her subordinate's amounts, this checkbox is selected. However, unless you have the "View All Data" permission, if your forecast manager adjusts your forecast amount, this checkbox remains deselected. You don't have access to your forecast manager's adjustment information. Also add Has Owner Adjustment. If a forecast user adjusts his or her own forecast, this checkbox is selected.
Quota detail for your forecasts.	Create a Forecasting Quotas report. For example, depending on how your Salesforce admin set up the report type, you can include fields, such as the full name of the quota owner. Then you can filter by your own name to see quotas that you created and their related accounts and owners.
How forecast amounts today compare with earlier forecast amounts.	Create a Forecasts with Historical Trending report, and then compare the value of the Forecast Amount field at the beginning of the month with its value at the end of the month, sorted by owner.
Results for your direct reports only.	When creating a forecasting report, choose My Direct Reports' <item name> from the Show menu.
Which type of forecast the results are from.	Refer to the Forecasting Type field in the report results. This field is included in the default page layout for Forecasting Item and Quota reports.



## Viewing and Editing Forecasts

Learn about several basic tasks to help you view and edit information in Collaborative Forecasts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

### IN THIS SECTION:

#### [Change Your Forecast Date Range Display](#)

The forecasts grid shows forecast amounts for individual months or quarters and a range of months or quarters, depending on your settings. When your Salesforce admin sets up Collaborative Forecasts, a default forecast date range display is selected. For example, your default can be three months into the future. Use this default or change the date range that's displayed for your own forecast.

#### [Change Between Forecast Types](#)

If you have multiple types of forecasts enabled in Collaborative Forecasts, select the type to use in your forecasts.

#### [Guidelines for Viewing Opportunity Details from a Forecast](#)

From your forecasts detail page or any subordinate's forecasts detail page in Collaborative Forecasts, you can view the opportunities that make up a forecast: for a month or month range, for all your subordinates, or just one.

#### [Guidelines for Refreshing Forecasts](#)

Certain actions can change forecast amounts in Collaborative Forecasts. For example, while you're viewing a forecasts page, your subordinates can edit related opportunities and adjust the forecasts of their own subordinates. And you can adjust one of your subordinates' forecasts from your own page. To see these changes, refresh the forecasts page.

### 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

## Change Your Forecast Date Range Display

The forecasts grid shows forecast amounts for individual months or quarters and a range of months or quarters, depending on your settings. When your Salesforce admin sets up Collaborative Forecasts, a default forecast date range display is selected. For example, your default can be three months into the future. Use this default or change the date range that's displayed for your own forecast.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

The range that you select is relative to the current month or quarter. For example, in January, you select January as your beginning month and April as the ending month. In February, the date range displayed becomes February to May, and so on. Your date range selection remains until you choose another one.

1. Click the **Forecasts** tab.
2. If you're using Lightning Experience, click the gear in the upper right of the forecasts page. If you're using Salesforce Classic, click **Change** in the rollup table.
3. Select a beginning and ending period.
4. Save your changes.

### SEE ALSO:

[Monthly and Quarterly Forecasts](#)  
[Collaborative Forecasts Concepts](#)

### 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 use Forecasts:

- Allow Forecasting

## Change Between Forecast Types

If you have multiple types of forecasts enabled in Collaborative Forecasts, select the type to use in your forecasts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

### IN THIS SECTION:

[Change Between Forecast Types in Lightning Experience](#)

Use Lightning Experience to select the forecast type to use.

[Change Between Forecast Types in Salesforce Classic](#)

Use Salesforce Classic to select the forecast type to use.

### SEE ALSO:

[Collaborative Forecasts Elements](#)

[Revenue and Quantity Forecast Measurements](#)


[Collaborative Forecasts Concepts](#)

[Guidelines for Using Multiple Currencies in Collaborative Forecasts](#)

[Adjusting Forecasts in Collaborative Forecasts](#)

## Change Between Forecast Types in Lightning Experience

Use Lightning Experience to select the forecast type to use.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. Click the gear in the upper right of the forecasts page.
2. Select a forecast type.
3. If multiple currencies are enabled, select your display currency.

### 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

### EDITIONS

Available in: 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 use Forecasts:

- Allow Forecasting

## Change Between Forecast Types in Salesforce Classic

Use Salesforce Classic to select the forecast type to use.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. Click  next to the forecast name in currency type or units.
2. Select **Revenue** or **Quantity (Units)**.
3. If you select **Revenue** and multiple currencies are enabled, select your display currency. Under Currency, click **Change currency**.

### EDITIONS

Available in: Salesforce Classic

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 use Forecasts:

- Allow Forecasting

## Guidelines for Viewing Opportunity Details from a Forecast

From your forecasts detail page or any subordinate's forecasts detail page in Collaborative Forecasts, you can view the opportunities that make up a forecast: for a month or month range, for all your subordinates, or just one.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

- In Lightning Experience, when you return to the opportunity summary after switching the view, leaving the page, or logging out, the most recent sort appears. If the forecast view that you switch to doesn't include the column that you sorted on, the default sort is shown.
- If your sales team forecasts on product families, you can view your own or a subordinate's opportunities for each product family that's forecasted on. When you select a cell in the rollup table, the opportunities related to that cell appear in a list at the bottom of the page. You can sort the opportunities by column header.
- In Salesforce Classic, an opportunity that contains only a single 100% revenue split shows "--" for the split percentage in the opportunity list.
- To view the split details for an opportunity, hover over the split percentage for the opportunity and click  (Salesforce Classic only). The Opportunity Splits detail window appears, showing splits that roll up to the selected forecast cell in bold. Splits on the opportunity that don't roll up to the selected forecast cell appear in gray. Opportunities that contain only a single 100% split for the opportunity owner don't display split details.

### 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


Kevin Bailey • April FY 2014 • All Forecast Categories • USD 655,625.00				
Action	Opportunity Name	Account Name	Forecasted Amount	Split
<a href="#">Edit</a>	<a href="#">Canson 55 Widget ...</a>	<a href="#">Canson</a>	USD 307,500.00	<a href="#">25.00%</a>
<a href="#">Edit</a>	<a href="#">Red Packages - 10 ...</a>	<a href="#">Red Packages</a>	USD 137,500.00	25.00%
<a href="#">Edit</a>	<a href="#">Red Packages - 10 ...</a>	<a href="#">Red Packages</a>	USD 137,500.00	25.00%
<a href="#">Edit</a>	<a href="#">Canson - 20 Spide ...</a>	<a href="#">Canson</a>	USD 43,250.00	25.00%
<a href="#">Edit</a>	<a href="#">Universal Technolo ...</a>	<a href="#">Universal Technolo ...</a>	USD 14,250.00	25.00%

Opportunity Splits


25.00%	Kevin Bailey	USD 307,500.00
75.00%	Anna Bressan	USD 922,500.00
Total Opportunity Value:		USD 1,230,000.00

### Guidelines for Refreshing Forecasts

Certain actions can change forecast amounts in Collaborative Forecasts. For example, while you’re viewing a forecasts page, your subordinates can edit related opportunities and adjust the forecasts of their own subordinates. And you can adjust one of your subordinates’ forecasts from your own page. To see these changes, refresh the forecasts page.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

When any opportunity update or forecast adjustment occurs for a forecast that you’ve selected in a rollup table, we let you know.

- If the selected forecast has adjustments in process (your own or your subordinate’s), you see a processing indicator (  ) next to the forecast (Salesforce Classic only).
- If any of the selected forecast’s related opportunities have been updated, you see the processing indicator in the header of the opportunities list (Salesforce Classic only).
- A message, `Processing Changes`, appears in the opportunities list header.


To see the changes, click **Refresh**.

SEE ALSO:

- [Adjusting Forecasts in Collaborative Forecasts](#)
- [Adjustments Purges in Collaborative Forecasts](#)

### Forecast Types

Learn about the forecast types available in Collaborative Forecasts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

IN THIS SECTION:

- [Revenue and Quantity Forecast Measurements](#)  
Calculate forecasts on revenue or quantity in Collaborative Forecasts.
- [Custom Opportunity Field Forecasts](#)  
Track and predict revenue beyond the standard opportunity `Amount` field in Collaborative Forecasts.
- [Overlay Splits Forecasts](#)  
Track revenue in Collaborative Forecasts from sales team members who help close opportunities but aren’t directly responsible for them.

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

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

## Revenue and Quantity Forecast Measurements

Calculate forecasts on revenue or quantity in Collaborative Forecasts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

- 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.

For example:

- A sales manager needs to forecast using revenue because the sales vice president sets quota amounts based on the US dollar.
- A sales rep needs to forecast using quantity because of an incentive to sell 10,000 units of a promotional product.

If you want to forecast revenue and quantity for the same data source, such as opportunities or product families, your Salesforce admin can create a forecast type for each, and you can toggle between them on the forecasts page.

SEE ALSO:

[Change Between Forecast Types](#)

[Collaborative Forecasts Concepts](#)

[Guidelines for Using Multiple Currencies in Collaborative Forecasts](#)

[Adjusting Forecasts 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


## Custom Opportunity Field Forecasts

Track and predict revenue beyond the standard opportunity `Amount` field in Collaborative Forecasts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

You can forecast on custom currency fields on opportunities. For example, your sales team can use a custom field such as `Margin`, `Monthly Recurring Revenue`, `Annual Contract Value`, or any other currency field that your company requires. Your Salesforce admin can set up forecasts based on a custom field, which sales managers can then view on the forecasts page.

If you use opportunity splits with your custom field, your forecast incorporates those splits. You can use a custom field forecast by itself or with other forecasts, such as an opportunity-revenue forecast based on the opportunity `Amount` field. Your admin can also set up a forecast for the standard `Expected Revenue` field.

 **Note:** If forecast managers or sales reps viewing the forecast can't access the custom opportunity field, they can see forecast amounts but not the custom field values in the opportunity list.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

## Forecasting on Annual Contract Value: A Simple Custom Field Forecast

Here we see an opportunity owned by sales rep Anna Bressan. Anna has many multiyear deals, so the revenue received from a deal each year is tracked in a custom Annual Contract Value field.

Opportunity  
**Acme - Premium Support**

Customize Page | Edit Layout | Printable View | Help for this Page

Click to add topics

« Back to List: Users

Opportunity Team (3) | Opportunity Splits (2) | Open Activities (0) | Activity History (0) | Contact Roles (0) | Partners (0) | Competitors (0) | Products (0) | Notes & Attachments (0) | Stage History (1)

**Opportunity Detail** [Edit] [Delete] [Clone] [Sharing]

Opportunity Owner	Anna Bressan [Change]	Close Date	4/15/2014
Opportunity Name	Acme - Premium Support	Stage	Negotiation/Review
Account Name	Acme Inc.	Probability (%)	90%
Type	Existing Business	Amount	USD 250,000.00
Primary Campaign Source			
Discount Percentage			
Commission	USD 0.00		
Region/Zone	/		
Discounted Amount	USD 250,000.00		
Annual Contract Value	USD 125,000.00		

- Anna owns this opportunity (1).
- This field shows the custom Annual Contract Value (2).

The Annual Contract Value field in all Anna's opportunities rolls up into her Annual Contract Value forecast, which appears on the forecasts page along with any other forecasts that are set up in Salesforce.

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Jump to... | Allison Wheeler | Kathy Cooper | **Anna Bressan Forecast** | Annual Contract Value in U.S. Dollar | Display Options | Refresh

Amounts shown are based on exchange rate conversion.


	Closed	Commit	Best Case	Pipeline
<b>Total: 3 Months (Change)</b>	USD 20,000.00	USD 1,276,250.00	USD 3,649,500.00	USD 2,033,000.00
<b>April FY 2014</b>	USD 0.00	USD 1,221,250.00	USD 922,500.00	USD 265,000.00
May FY 2014	USD 20,000.00	USD 27,500.00	USD 1,340,000.00	USD 1,719,000.00
June FY 2014	USD 0.00	USD 27,500.00	USD 1,387,000.00	USD 49,000.00

Anna Bressan • April FY 2014 • All Forecast Categories • **USD 2,408,750.00**

Action	Opportunity Name	Account Name	Forecasted Amount	Split	Close Date	Stage	Probability (%)	Forecast Category	Owner Full Name	Amount
Edit	Canson 55 Widget Deal	Canson	USD 922,500.00	---	4/23/2014	Proposal/Price ...	75	Best Case	Bressan, Anna	USD 1,230,000.00
Edit	Red Packages - 10 Spi...	Red Packages	USD 550,000.00	---	4/30/2014	Negotiation/Revi...	90	Commit	Bressan, Anna	USD 1,125,000.00
Edit	Red Packages - 10 Spi...	Red Packages	USD 550,000.00	---	4/11/2014	Negotiation/Revi...	90	Commit	Bressan, Anna	USD 1,125,000.00
Edit	Canson - 20 Spider 4 S...	Canson	USD 173,000.00	---	4/14/2014	Prospecting	10	Pipeline	Bressan, Anna	USD 383,250.00
Edit	Acme - Premium Support	Acme Inc.	USD 125,000.00	---	4/15/2014	Negotiation/Revi...	90	Commit	Bressan, Anna	USD 250,000.00
Edit	Universal Technolog...	Universal Tec...	USD 57,000.00	---	4/11/2014	Needs Analysis	20	Pipeline	Bressan, Anna	USD 117,700.00
Edit	STC Labs - 9 Infinity La...	STC Labs	USD 25,000.00	---	4/11/2014	Negotiation/Revi...	90	Commit	Bressan, Anna	USD 50,000.00
Edit	STC Labs - 15 Infinity L...	STC Labs	USD 14,000.00	---	4/11/2014	Prospecting	10	Pipeline	Bressan, Anna	USD 28,000.00

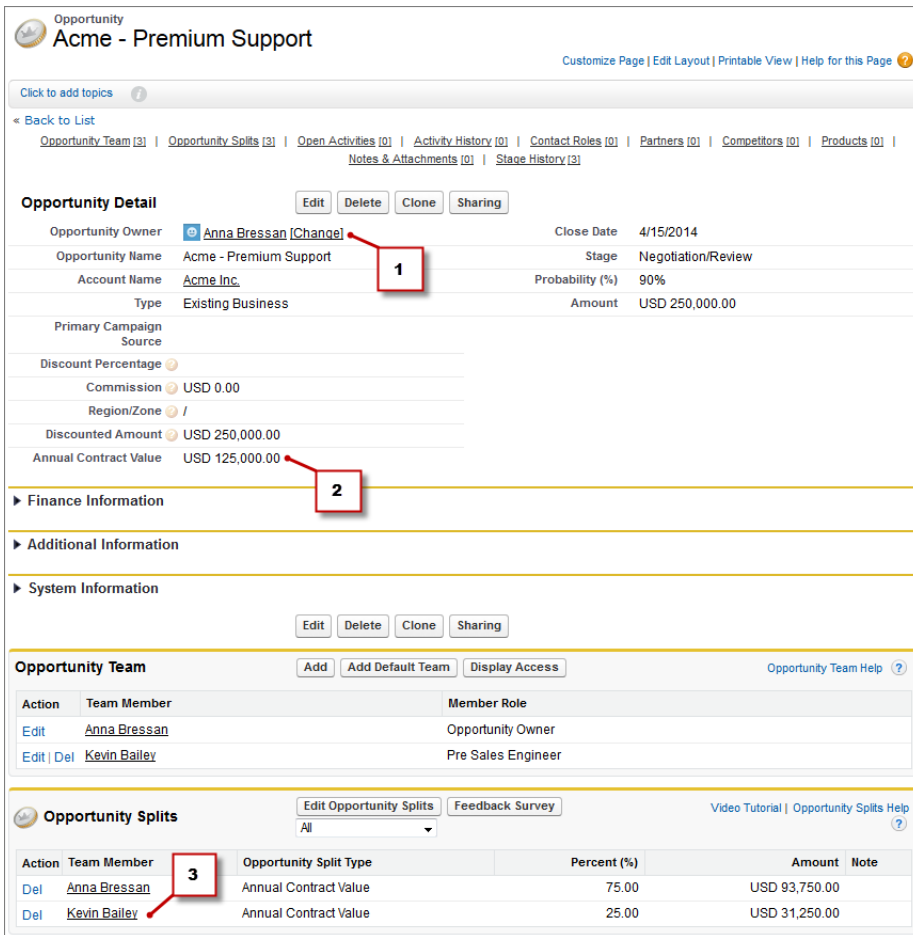
1-11 of 11 | Page 1 of 1 | Chat

- This area shows the Annual Contract Value forecast for Anna (1).
- This forecast has the same name as the custom field (2).
- The Forecasted Amount is the value of the Annual Contract Value field that rolls up into Anna's forecast (3).
- This area shows the Forecasted Amount from the Annual Contract Value field on Anna's Acme - Premium Support opportunity (4).

 **Note:** To enable a custom field forecast, your Salesforce admin must enable opportunity splits for the custom field. However, the opportunity owner automatically receives a 100% split for the field, so if your company doesn't plan to use splits with the field, the rollup is the same as if there were no splits.

## A Custom Field Forecast with Opportunity Splits

If you use opportunity splits on your custom field, your custom field forecast rolls up those splits. For example, here we can see that sales rep Anna owns an opportunity, which includes a custom split on the Annual Contract Value field for Kevin, a sales engineer responsible for increasing overall Annual Contract Value for the company. In this case, Kevin's 25% split rolls up into his Annual Contract Value forecast.



**Opportunity Detail**

Opportunity Owner: [Anna Bressan](#) [Change] Close Date: 4/15/2014

Opportunity Name: **Acme - Premium Support** Stage: Negotiation/Review

Account Name: [Acme Inc.](#) Probability (%): 90%

Type: Existing Business Amount: USD 250,000.00

Primary Campaign Source

Discount Percentage

Commission: USD 0.00

Region/Zone: /

Discounted Amount: USD 250,000.00

Annual Contract Value: USD 125,000.00

**Finance Information**

**Additional Information**

**System Information**

**Opportunity Team**

Action	Team Member	Member Role
<a href="#">Edit</a>	<a href="#">Anna Bressan</a>	Opportunity Owner
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Kevin Bailey</a>	Pre Sales Engineer

**Opportunity Splits**

Action	Team Member	Opportunity Split Type	Percent (%)	Amount	Note
<a href="#">Del</a>	<a href="#">Anna Bressan</a>	Annual Contract Value	75.00	USD 93,750.00	
<a href="#">Del</a>	<a href="#">Kevin Bailey</a>	Annual Contract Value	25.00	USD 31,250.00	

- Anna owns this opportunity (1).
- The opportunity contains a custom currency field called Annual Contract Value (2).
- Kevin receives a 25% split on the Annual Contract Value field (3).

Kevin's manager can view the Annual Contract Value forecast where he can see the deal to which Kevin is contributing, along with all the other opportunities that his sales engineer team is working on. Kevin's manager can see that Kevin is receiving a 25% credit for all his opportunities, which contribute to a total of \$1,026,000 revenue in his Best Case forecast. If Kevin's manager thinks the deal will ultimately close for a higher amount, his manager can adjust the Best Case forecast amount upward. Anna's manager can see Anna's 75% split in her forecast.

**Kevin Bailey Forecast**

Amounts shown are based on exchange rate conversion.

	Closed	Commit	Best Case	Pipeline
<b>Total: 3 Months (Change)</b>	USD 36,250.00	USD 326,875.00	USD 1,026,000.00	USD 812,000.00
<b>April FY 2014</b>	USD 0.00	USD 313,125.00	USD 307,500.00	USD 66,250.00
May FY 2014	USD 5,000.00	USD 6,875.00	USD 371,750.00	USD 733,500.00
June FY 2014	USD 31,250.00	USD 6,875.00	USD 346,750.00	USD 12,250.00

Kevin Bailey • April FY 2014 • All Forecast Categories • **USD 686,875.00**

Action	Opportunity Name	Account Name	Forecasted Amount	Split	Close Date	Stage	Probability (%)	Forecast Category	Owner Full Na...	Amount
Edit	Canson 55 Widget Deal	Canson	USD 307,500.00	25.00%	4/23/2014	Proposal/Price Q...	75	Best Case	Bressan, Anna	USD 1,230,000.00
Edit	Red Packages - 10 Spid...	Red Packages	USD 137,500.00	25.00%	4/30/2014	Negotiation/Revi...	90	Commit	Bressan, Anna	USD 1,125,000.00
Edit	Red Packages - 10 Spid...	Red Packages	USD 137,500.00	25.00%	4/11/2014	Negotiation/Revi...	90	Commit	Bressan, Anna	USD 1,125,000.00
Edit	Canson - 20 Spider 4 S...	Canson	USD 43,250.00	25.00%	4/14/2014	Prospecting	10	Pipeline	Bressan, Anna	USD 383,250.00
Edit	Acme - Premium Support	Acme Inc.	USD 31,250.00	25.00%	4/15/2014	Negotiation/Revi...	90	Commit	Bressan, Anna	USD 250,000.00
Edit	Universal Technologies ...	Universal Tec...	USD 14,250.00	25.00%	4/11/2014	Needs Analysis	20	Pipeline	Bressan, Anna	USD 117,700.00

- This area shows Kevin's Annual Contract Value split forecast (1).
- This area shows Kevin's 25% split on Anna's Acme – Premium Support opportunity (2).

## Forecasts from the Standard Expected Revenue Field

The standard `Expected Revenue` field is useful for opportunities that are likely to produce more or less revenue than indicated in the `Amount` field. If you use the `Expected Revenue` field, your admin can set up a forecast for it. The Expected Revenue forecast then appears in the dropdown list in the same way as a custom field forecast.

## Overlay Splits Forecasts

Track revenue in Collaborative Forecasts from sales team members who help close opportunities but aren't directly responsible for them.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

As a sales manager, you probably use revenue splits for crediting team members who are directly responsible for opportunities. To provide more flexibility with how you assign credit for opportunities, you can use overlay splits, which help you and other team members allocate credit to overlay sales roles for working on opportunities. Overlay splits can add up to any percentage of the opportunity amount, sometimes exceeding 100%. For example, your sales team can include sales engineers, product specialists, or partners who help close deals but aren't directly responsible for them.

Overlay forecasts let you predict revenue from overlay splits. Forecast amounts roll up through the role hierarchy based on the opportunity's `Amount` field and the overlay team member's split percentage.

Here you can see that sales rep Scott owns an opportunity, which includes an overlay split for sales engineer Owen, who's working with Scott to close the deal. For Scott, the opportunity `Amount` field rolls into his opportunity revenue forecast.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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



Opportunity  
**Anaco Limited - 400K**

Show Feed

Opportunity Team (3) | Opportunity Splits (4) | Open Activities (3) | Activity History (3) | Contact Roles (3) | Products (North America) (1) | Quotes (3)

**Opportunity Detail**

Opportunity Name: Anaco Limited - 400K  
 Opportunity Owner: [Scott Thompson \(Change\)](#)  
 Account Name: [Anaco Limited](#)  
 Type: New Business

Amount: \$396,000.00  
 Profit:  
 Close Date: 12/27/2013  
 Stage: Needs Analysis  
 Forecast Category: Best Case  
 Probability (%): 20%

**Description**

Description: Great sales cycle, with our new product this looks like a great fit  
 Next Step: calling up the chain

**Marketing Information**

Lead Source: Google Adwords

**System Information**

Created By: [Scott Thompson](#), 8/9/2013 2:04 PM  
 Last Modified By: [Valerie Jones](#)  
 Opportunity Record Type: Simple (Change)

**Opportunity Team**

Action: Team Member  
 Edit: [Scott Thompson](#)  
 Edit / Del: [Sue Marlet](#)  
 Edit / Del: [Owen Overlay](#)

Member Role  
 Opportunity Owner  
 Account Manager

**Opportunity Splits**

Edit Opportunity Splits | Feedback Survey | All

Action	Team Member	Opportunity Split Type	Percent (%)	Amount	Note
Del	<a href="#">Owen Overlay</a>	Overlay	50.00	\$198,000.00	specialist

- Scott owns this opportunity (1).
- Owen receives a 50% split (2).

Owen's manager can also view the overlay forecast where he can see the deal to which Owen is contributing, along with all the other opportunities that his sales engineer team is working on. Owen's manager can see that Owen is receiving a 50% credit for this deal, which contributes to a total of \$948,000 revenue in his Best Case forecast. If Owen's manager thinks the deal will close for a higher amount, he can adjust the Best Case forecast amount.

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Jump to... | Elliot Smith | Jeff Diamond | Valerie Jones

**Karen Adams Forecast**

Forecasts Setup | Video Tutorial | Help for this Page

Refresh

	Quota	Closed	Commit	Best Case	Pipeline
<b>Total: 2 Quarters (Change)</b>	\$1,200,000.00	\$74,000.00	\$377,129.00	\$948,000.00	\$591,000.00
<b>FQ4 FY 2013</b>	\$600,000.00	\$74,000.00	\$377,129.00	\$948,000.00	\$591,000.00
Octavia Overlay	\$200,000.00	\$53,500.00	\$54,000.00	\$160,000.00	\$160,000.00
Olivia Overlay	\$200,000.00	\$12,000.00	\$217,564.50	\$590,000.00	\$347,000.00
Owen Overlay	\$200,000.00	\$8,500.00	\$105,564.50	\$198,000.00	\$84,000.00
Wendy Overlay's Own Opportunities	-	\$0.00	\$0.00	\$0.00	\$0.00

Wendy Overlay Team • FQ4 FY 2013 • All Forecast Categories • \$1,999,000.00 (Units)

Action	Opportunity Name	Account Name	Amount	Split	Forecasted Amount	Close Date	Stage	Probability (%)	Forecast Category	Owner Full Name	Next
Edit	<a href="#">Haven Enterprises - 322K</a>	<a href="#">Haven Enterprises</a>	\$590,000.00	100.00%	\$590,000.00	12/29/2013	Needs Analysis	20	Best Case	<a href="#">Thompson, Scott</a>	Dis
Edit	<a href="#">Anaco Limited - 400K</a>	<a href="#">Anaco Limited</a>	\$396,000.00	50.00%	\$198,000.00	12/27/2013	Needs Analysis	20	Best Case	<a href="#">Thompson, Scott</a>	call
Edit	<a href="#">Emplonnet - 322K</a>	<a href="#">Emplonnet</a>	\$322,000.00	100.00%	\$322,000.00	11/25/2013	Qualification	10	Pipeline	<a href="#">Lee, Kasey</a>	Que
Edit	<a href="#">Green Dot - 160K</a>	<a href="#">Green Dot</a>	\$160,000.00	100.00%	\$160,000.00	12/17/2013	Needs Analysis	35	Best Case	<a href="#">McCrane, Elv</a>	Que
Edit	<a href="#">Towson Inc - 140K</a>	<a href="#">Towson Inc.</a>	\$140,000.00	100.00%	\$140,000.00	12/18/2013	Qualification	10	Pipeline	<a href="#">Long, Cindy</a>	Que

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Chat

- The Forecast Type menu in Salesforce Classic showing the Overlay Splits forecast (1)
- Owen's 50% split (2)
- Owen's \$198,000 contribution to the FQ4 FY 2013 Best Case forecast (3)
- The total Best Case amount for FQ4 FY 2013 (4)

## Forecast Adjustments

Collaborative Forecasts users who anticipate differences between the current forecast and actual future results can change forecast rollup amounts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

### IN THIS SECTION:

#### [Adjusting Forecasts in Collaborative Forecasts](#)

Add adjustments to the Best Case and Commit forecast amounts. Then change or remove adjustments as needed.

#### [Adjust Forecasts](#)

To add an adjustment to a Best Case or Commit forecast amount in Collaborative Forecasts, click its cell in the forecast table, and then enter the new amount.

#### [View and Edit Forecast Adjustments](#)

View details about forecast adjustments in Collaborative Forecasts, including who made the adjustments, the adjusted amounts, and the original gross rollup (the forecast amount before adjustments). Edit adjustments that you've made as needed.

#### [Adjustments Purges in Collaborative Forecasts](#)

Adjustments can be purged when you change some forecast and custom fiscal year settings. The data on which the forecasts are based remains untouched.

### 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

## Adjusting Forecasts in Collaborative Forecasts

Add adjustments to the Best Case and Commit forecast amounts. Then change or remove adjustments as needed.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

To adjust forecasts, adjustments must be enabled. Your Salesforce admin can enable managers to adjust subordinates' forecasts, all Collaborative Forecasts users to adjust their own forecasts, or both.

An adjustment shows forecast managers' or sales reps' judgment about the final amount that they expect a forecast's opportunities to bring in at the close of the forecast period. Some forecast managers need to adjust their own or a subordinate's forecast. For example, they know that some employees tend to be too optimistic or too conservative when assigning amounts to opportunities. Sales reps can also adjust their own forecasts if they think that opportunity amounts are understated or overstated. Forecast managers can adjust forecasts that include only gross opportunity amounts and forecasts that have adjustments made by someone else in their opportunity team. An adjustment doesn't change the underlying gross rollup amount—it just adds a layer of detail. If multiple types of forecasts are enabled, each forecast type maintains separate adjustments.

### 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


Forecast managers can adjust their own Commit and Best Case forecasts and the forecasts of subordinates one level below them in the forecast hierarchy. They can view adjustments that subordinates make at every level below them in the forecast hierarchy. Adjustments made to their subordinates' forecasts roll up into their own forecasts. When you adjust, you can include an explanatory note. Adjustment notes don't appear in reports.

For example, let's say you're a sales manager who's adjusted the forecast of one of your sales reps down from \$2,000 to \$1,500. Your vice president, who's your forecast manager, sees \$1,500 when viewing your forecast, along with an icon indicating that the amount contains an adjustment. The vice president can decide to adjust it back to \$2,000.

Forecast managers' own forecasts pages show all their forecast amounts and related opportunity details. When managers view a subordinate's forecasts page, they see the totals that the subordinate sees. Any adjustments that the managers make to subordinates' amounts from their own forecast page don't appear on the subordinate's forecasts page. Instead, the managers see that subordinate's forecasts and any adjustments that the subordinates made to their own amounts or amounts of their subordinates. For example, let's say you're a vice president of sales. On your own forecasts page, you see a July Best Case forecast of \$1,250 (including a \$50 adjustment that you made) for one of your first-level subordinates, a sales manager. However, when you view the sales manager's forecasts page, the July Best Case forecast is \$1,200, because it doesn't include your adjustment. If a manager and a subordinate adjust the same forecast amount, only the manager's adjustment rolls up the forecast hierarchy.

If multiple types of forecasts are enabled, each forecast type maintains separate adjustments. For example, if opportunity-revenue and opportunity-quantity forecasts are enabled, you can adjust forecast amounts in each of those forecasts. However, adjustments made in the opportunity-revenue-based forecast aren't displayed as adjustments in any other forecast type. So if you adjust an amount in the opportunity-revenue forecast from \$100,000 to \$90,000 and then switch your forecast view, you don't see an equivalent adjustment value in the opportunity-quantity forecast. If you change the forecast view back to the opportunity-revenue forecast, you see your adjustment of \$90,000. If you use product family forecasts, you can't adjust your own product family forecast amounts.

When an opportunity moves from one forecast category to another, such as from Pipeline to Best Case, the unadjusted raw amounts change for each of those rollups. However, forecast amounts with adjustments don't change in the rollup table on the forecasts page. We recommend updating or removing your adjustments to each forecast rollup to account for changes in the stage of opportunities.

 **Note:** While you're viewing a forecasts page, your subordinates can be adjusting forecast amounts or editing related opportunities. Or you can adjust one of your subordinates' forecasts from your own page. All these events change forecast amounts. Click **Refresh** to view the most recent forecast amounts.

This table shows who can view and adjust your forecasts.







User	Can view your forecasts?	Can adjust your forecasts?
Your manager's manager	Yes	No
Your manager	Yes	Yes. The manager adjusts amounts from his or her own forecasts page.
You	Yes	Yes, if enabled by your admin. You can adjust forecast totals only, not the subtotal for My Opportunities.
Your direct report	No	No
Your subordinate who's not a direct report	No	No

This table shows whose forecasts you can view and adjust.

User	Can you view forecasts?	Can you adjust forecasts?
Your manager's manager	No	No
Your manager	No	No
You	Yes	Yes, if enabled by your Salesforce admin
Your direct report	Yes. However, if you select a direct subordinate's forecast, you see the same view as that subordinate, so your adjustments aren't visible.	Yes. You adjust these amounts from your own forecasts page.
Your subordinate who's not a direct report	Yes. You see the same view that the subordinate sees.	No. Your direct reports can adjust their own direct reports' forecasts.

If a forecast contains an adjustment:

- In Lightning Experience, you see the  icon next to the forecast amount.
- In Salesforce Classic, you see these icons next to the forecast amount.

Icon in Salesforce Classic	Definition
	You adjusted the forecast amount. You see this indicator only on your forecasts page.
	One of your subordinates adjusted the forecast. You see this indicator on your forecasts page and your subordinates' forecasts pages.
	You and one or more subordinates adjusted the forecast. You see this indicator only on your forecasts page, because when you drill down to a subordinate's page, you see the page as that user sees it.
	Save your adjustment.
	Undo your adjustment and restore the previous value of the forecast. Hover over the button to see a tool tip that tells you if the previous value includes an adjustment.
	The adjustment includes a note.

Icon in Salesforce Classic	Definition
<b>remove</b>	Remove your adjustment and restore the previous value, which can include someone else’s adjustment.

- SEE ALSO:
- [Adjust Forecasts](#)
  - [View and Edit Forecast Adjustments](#)
  - [Adjustments Purges in Collaborative Forecasts](#)
  - [Change Between Forecast Types](#)
  - [Guidelines for Refreshing Forecasts](#)


Adjust Forecasts

To add an adjustment to a Best Case or Commit forecast amount in Collaborative Forecasts, click its cell in the forecast table, and then enter the new amount.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

To adjust forecasts, adjustments must be enabled. Your Salesforce admin can enable managers to adjust subordinates’ forecasts, all Collaborative Forecasts users to adjust their own forecasts, or both.

If you use product family forecasts, adjust a subordinate’s individual product family totals rather than the total for all product families.

1. Find the forecast that you want to adjust, and then hover over its cell and click .
2. Enter your adjustment.
3. To include information about why you made the adjustment, add a note (140 characters maximum).
4. Save your changes. An icon appears in the cell to show that you adjusted the forecast. The adjustment rolls up to the period range total rows on the page.

- SEE ALSO:
- [Adjusting Forecasts in Collaborative Forecasts](#)
  - [View and Edit Forecast Adjustments](#)
  - [Adjustments Purges in Collaborative Forecasts](#)
  - [Change Between Forecast Types](#)

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 use Forecasts:


- Allow Forecasting



To adjust Forecasts:

- Override Forecasts

## View and Edit Forecast Adjustments

View details about forecast adjustments in Collaborative Forecasts, including who made the adjustments, the adjusted amounts, and the original gross rollup (the forecast amount before adjustments). Edit adjustments that you've made as needed.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. Find the adjusted forecast that you want to view or edit. (An indicator appears next to the adjusted forecast amount.)
2. To view the adjustment details, do one of the following.
  - If you're using Lightning Experience, click .
  - If you're using Salesforce Classic, hover over the forecast's cell.
3. Click  to edit or remove any adjustments that you made.

SEE ALSO:

[Adjusting Forecasts in Collaborative Forecasts](#)  
[Adjust Forecasts](#)

## Adjustments Purges in Collaborative Forecasts

Adjustments can be purged when you change some forecast and custom fiscal year settings. The data on which the forecasts are based remains untouched.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Adjustment purges happen when your Salesforce admin does any of the following.

- Disables Collaborative Forecasts.
- Disables manager adjustments. Only adjustments made by forecast managers to their subordinates' forecasts are purged.
- Disables owner adjustments. Only adjustments made by forecast users to their own forecasts are purged.
- Changes your forecast period setting from quarterly to monthly or from monthly to quarterly.
- Disables a forecast type. Only adjustments for that forecast type are purged.
- Changes the start month of your fiscal year when the forecast period is set to quarterly. Quotas and adjustments are purged.
- Deletes a product family. Quotas and adjustments are purged for the deleted product family.
- Switches from cumulative forecast rollups to individual forecast category rollups or from individual to cumulative rollups.
- Creates a custom fiscal year for the first time. All adjustments and quotas for the corresponding and following standard fiscal years are purged.

### 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 use Forecasts:

- Allow Forecasting

To adjust Forecasts:

- Override 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

- Deletes a custom fiscal period or quarter. Forecast adjustments and quotas for that period or quarter are also deleted.

Adjustment purges also happen when either of the following is true.

- You're no longer a forecast manager. Only adjustments that you made to subordinates' forecast amounts are purged.
- You're removed from a role that's set as a forecast manager in the forecast hierarchy. Only adjustments that you made to subordinates' forecast amounts are purged.

SEE ALSO:

[Adjusting Forecasts in Collaborative Forecasts](#)

[Adjust Forecasts](#)

## Quotas in Collaborative Forecasts

A forecast quota is the monthly or quarterly sales goal that's assigned to a sales team member. 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 you have multiple types of forecasts enabled, each type maintains separate quota information.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

If forecast quotas are enabled, quota data appears in these locations on the forecasts page.

- A column that contains quota amounts for a specific period. If your forecast includes product families, this column includes quotas for each product family.
- A row that contains the percentage amounts attained for a specific period in a specific forecast rollup.

IN THIS SECTION:

[Considerations for Using Quotas in Collaborative Forecasts](#)

Before you use forecast quotas, review some considerations.

[Show and Hide Quota Information in Collaborative Forecasts](#)

Show and hide quota data so that your forecasts page looks the way you want it to look.

## Considerations for Using Quotas in Collaborative Forecasts

Before you use forecast quotas, review some considerations.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

- Viewing quota attainment information isn't available in Lightning Experience.
- In product family forecasts, sales managers can't see their own quotas and quota attainment for individual product families. Only their total quota appears in the rollup table. For example, if three sales reps have combined quota amounts of \$75,000 and their forecast manager has an individual quota of \$30,000, the manager's quota is \$105,000.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Available in: **Professional** Edition with the "API Enabled" permission

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Available in: **Professional** Edition with the "API Enabled" permission

- You can edit direct subordinates' quotas only ("Manage Quotas" permission required)—not your own.

SEE ALSO:

[Collaborative Forecasts Concepts](#)

[Show and Hide Quota Information in Collaborative Forecasts](#)

## Show and Hide Quota Information in Collaborative Forecasts

Show and hide quota data so that your forecasts page looks the way you want it to look.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

- Do one of the following.
  - If you're using Lightning Experience, click the gear in the upper right of the forecasts page.
  - If you're using Salesforce Classic, click **Display Options**.
- To show your quota amount for each period, select **Show Quota Column**.
- To show your quota attainment for a specific rollup in a selected period (Salesforce Classic only), select **Show Quota % Attainment**. The percentage shown below each forecast amount indicates the proportion of the user's quota that the amount represents.

The quota information displayed can be revenue or quantity amounts, depending on the type of forecast that you're using. If multiple types of forecasts are enabled, each forecast type maintains separate quota information. To hide quota information, deselect these options.

SEE ALSO:

[Considerations for Using Quotas in Collaborative Forecasts](#)

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Available in: **Professional** Edition with the "API Enabled" permission

### USER PERMISSIONS

To use quotas:

- Allow Forecasting
- AND
- Manage Quotas

## Predicting and Planning Your Sales Cycles with Forecasts FAQs

### Forecasts FAQ

- [What's the difference between the Forecasting versions?](#)
- [Why can't I use Territory Management?](#)
- [View and Update Opportunity-Stage-to-Forecast-Category Mappings](#)

SEE ALSO:

[Collaborative Forecasts Concepts](#)

### EDITIONS

Collaborative Forecasts available in: both Salesforce Classic and Lightning Experience

Customizable Forecasting available in: Salesforce Classic

Territory Management available in: Salesforce Classic



## What's the difference between the Forecasting versions?

[Collaborative Forecasts](#) includes much of the same functionality as [Customizable Forecasting](#).

See which features are available in each version of Forecasting. If you're migrating to Collaborative Forecasts, see [Considerations for Migrating from Customizable Forecasting to Collaborative Forecasts](#).

Feature	Customizable Forecasting	Collaborative Forecasts
API Access	✓	✓
Automatic Rollups	✓	✓
Chat in Real Time		✓
Custom Fiscal Years	✓	✓
Custom Opportunity Currency Field Forecasts		✓ (Not available in Professional Edition)
Default Forecast Currency Setting		✓
Individual Forecast Range Selection—Controlled by User	✓	✓
Map Forecast Categories to Opportunity Stages	✓	✓
Monthly Forecasts	✓	✓
Multiple Currency Support	✓	✓
Opportunity-level Adjustments	✓	Can use a custom opportunity currency field to save adjusted amounts and a custom field forecast to track the rollup of that field.
Opportunity List Filters and Sort		✓
Opportunity Splits Forecasts		✓ (Not available in Professional Edition)
Opportunity Stage	✓	✓
Overlay Splits Forecasts		✓ (Not available in Professional Edition)
Override (Adjust) Forecasts	✓	✓
Override (Adjustment) Notes	✓	✓

### EDITIONS

Collaborative Forecasts available in: both Salesforce Classic and Lightning Experience

Customizable Forecasting available in: Salesforce Classic

Territory Management available in: Salesforce Classic

Feature	Customizable Forecasting	Collaborative Forecasts
Partner Opportunities in Forecasts	✓	✓ (Not available in Professional Edition)
Product Family Forecasts	✓	✓
Product Schedule Forecasts	✓	
Quotas	✓	✓
Quantity Forecasts	✓	✓
Quarterly Forecasts	✓	✓
Rename Categories		✓
Reports and Dashboards	✓	✓
Resize Forecast Table Columns		✓
Revenue Forecasts	✓	✓
Share Forecasts	✓	✓ (Pilot, API only)
Snapshots and Forecast History	✓	✓
Sortable Opportunities List From the Forecast Page	✓	✓
Submit Forecasts	✓	
Territory Management	✓	
	(The original Territory Management feature only. Enterprise Territory Management is not supported.)	

SEE ALSO:

[Forecasts FAQ](#)

## Why can't I use Territory Management?

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Territory Management is available for Customizable Forecasting and not Collaborative Forecasts.

SEE ALSO:

[Forecasts FAQ](#)

### EDITIONS

Collaborative Forecasts available in: both Salesforce Classic and Lightning Experience

Customizable Forecasting available in: Salesforce Classic

Territory Management available in: Salesforce Classic

## Estimating Revenue and Sales with Customizable Forecasts


### Customizable Forecasting Overview

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

Customizable forecasting is a flexible solution for estimating how much revenue your organization can generate or how many items your organization can sell. You can set up customizable forecasting to reflect how your organization forecasts its sales. With it, you can forecast on a monthly or quarterly basis, use different dates when applying amounts to forecasts, forecast based on revenue or quantity or both, and define additional quotas based on product families.

Use customizable forecasts to review your forecast and drill down through your forecast amounts to see the opportunities included in your forecast. Override forecast amounts directly from the opportunity, or override the forecast from the Forecasts tab without notifying users below you in the forecast role hierarchy.

Clicking the Forecasts tab displays your forecast for the selected forecast period.

- Click **Submit** to submit a forecast, making a snapshot of the forecast data available in the forecast history and forecast reports. See [Submitting Customizable Forecasts](#).
- Click **Forecast History** to display the forecast data you submitted in the past. Then, click **Forecast Summary** to return to the current forecast data.
- Click **Printable View** to display the selected forecast in a simple, print-ready layout.
- Review your forecast and the forecasts of any direct reports or forecasts that are manually shared with you. See [Viewing Customizable Forecasts](#) for instructions on different viewing options.
- Click the Forecast subtab to see forecast details. See [Viewing Customizable Forecasts](#) for more information.
- Click the Opportunities subtab to see the opportunities that are included in the displayed forecast. On the Opportunities subtab, you can choose, or create, a list view to further filter the displayed opportunities. See [Viewing Customizable Forecasts](#) for more information.
- Click the edit icon (  ) to make changes to the adjusted forecast total, or to add an override to a particular forecast amount. For instructions on overriding forecast amounts, see [Overriding Customizable Forecasts](#).

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS


To see forecasts of other users:

- View All Forecasts

To override your forecast:

- Override Forecasts

If your forecast is not available, contact your administrator about adding you to the forecast hierarchy (or the territory hierarchy, if your organization uses territory management).

 **Note:** The Forecasts tab is unlike other tabs in that it automatically calculates data for you based on your opportunity data. You do not need to create or delete forecast records.

For information on implementing customizable forecasting for your organization, see [Setting Up Customizable Forecasting](#).


SEE ALSO:

[Do I Have Customizable Forecasting?](#)

[What's the difference between the Forecasting versions?](#)

[Managing Customizable Forecasts](#)

## Do I Have Customizable Forecasting?

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

Customizable forecasting may be difficult to distinguish because the tab name does not change when you convert to customizable forecasting. Here's how to tell if you have it:

Click the Forecasts tab.

- If you see either the **Introducing Customizable Forecasting** or **Request Now!** buttons, you don't have customizable forecasting.
- If you don't see either button, your organization already has customizable forecasting.

To enable customizable forecasting:

1. From Setup, enter *Forecasts (Customizable)* in the **Quick Find** box, then select **Forecasts Hierarchy**.
2. Select **Enable Customizable Forecasting**.
3. Once customizable forecasting is enabled, see [Setting Up Customizable Forecasting](#).

SEE ALSO:

[Customizable Forecasting Overview](#)

[What's the difference between the Forecasting versions?](#)

### EDITIONS

Available in: Salesforce Classic

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

## Setting Quotas for Customizable Forecasting

Users with the appropriate permission can set their individual quota. Administrators and users with the appropriate permission can always edit any quota, and managers can always change the quotas of users that report directly to them in the role hierarchy.

1. Do one of the following:
  - To set your personal quota, access your personal information in your personal settings.
  - To change the quota of a user that reports to you, from Setup, enter *Users* in the **Quick Find** box, then select **Users**, and click the full name of the appropriate user.
2. Click **Edit** in the Quotas related list.
3. Select the appropriate range start and range length. If available, select a territory and product family.



**Note:** If your organization uses custom fiscal years, you cannot set quotas for a period that does not have a defined fiscal year.

4. Enter the quota amounts for revenue and/or quantity.
5. Select the appropriate currency if you work with more than one currency.
6. Click **Save** to save the quota and return to the user detail page, or click **Quick Save** to save the values and continue to edit the quota.



**Tip:** Using **Quick Save** allows you to quickly set a different quota for each product family.



**Note:** If these options are not available to you, you may not have customizable forecasting. To determine if your organization has enabled customizable forecasting, see [Do I Have Customizable Forecasting?](#) on page 344. Delegated administrators won't see the quotas related list on user records.

You can also use tools like the Data Loader to do mass updates on quotas. When updating quotas, set the quota field value on the `RevenueForecast` or `QuantityForecast` objects.

SEE ALSO:

[Customizable Forecasting Overview](#)

[Managing Customizable Forecasts](#)

## Working with Forecast Categories



**Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

Your forecast is a representation of your opportunity amounts, dates, and stages. Click the Forecasts tab and notice that your forecast amounts are listed in different categories. Depending on its stage, an opportunity amount can be included in the following forecast categories:

- **Best Case** includes amounts you are likely to close, closed/won opportunity amounts, and amounts in the Commit category.
- **Closed** includes amounts for closed/won opportunities.
- **Commit** includes amounts you are confident about closing and closed/won opportunity amounts.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To set your quota:

- Edit Personal Quota

To set any user's quota:

- Manage Internal Users

AND


Modify All Data

### EDITIONS

Available in: Salesforce Classic

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

- **Omitted** means the amount does not contribute to your forecast.
- **Pipeline** includes amounts from all open opportunities.

 **Note:** You can edit the forecast category field on opportunities to change the value displayed in reports, opportunity detail and edit pages, opportunity searches, and opportunity list views. For example, you can change the value of the Commit category to Won to make the category name match your business processes.

Each value in the opportunity `Stage` picklist is automatically mapped to a `Probability` and value in the `Forecast Category` picklist. Change the `Stage` of an opportunity and the `Probability` as well as the `Forecast Category` changes with it.

For example, your organization may have mapped the “Negotiation/Review” stage to the “Best Case” forecast category. This means that the amounts of your opportunities in “Negotiation/Review” are included in your “Best Case” forecast amount. Your organization may have set up different mappings but an example of how these fields map is below:

Stage	Probability	Forecast Category
Prospecting	10%	Pipeline
Qualification	10%	Pipeline
Needs Analysis	20%	Pipeline
Value Proposition	50%	Pipeline
Id Decision Makers	60%	Pipeline
Perception Analysis	70%	Pipeline
Proposal/Price Quote	75%	Pipeline
Negotiation/Review	90%	Best Case
Closed Won	100%	Commit


Regardless of whether you use customizable forecasting or not, your forecasts still rely on how your opportunity `Stage` picklist values map to values in the `Forecast Category` picklist.

SEE ALSO:

[Customizable Forecasting Overview](#)

[Managing Customizable Forecasts](#)

## Managing Customizable Forecasts

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

Your forecasts represent your opportunity amounts, dates, and stages. To make sure your forecasts are an accurate representation of your revenue potential:

1. Review your forecast amounts. See [Viewing Customizable Forecasts](#) for instructions on different viewing options.
2. Determine if you want to override any amounts.
3. Override amounts if necessary. This requires the appropriate user permission. See [Overriding Customizable Forecasts](#) on page 349.
4. Submit your forecast to make a snapshot of your forecast data available in your forecast history and forecast reports. See [Submitting Customizable Forecasts](#).

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS


To see forecasts of other users:

- View All Forecasts

To override your forecast:


- Override Forecasts

## Viewing Customizable Forecasts

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

When you click the Forecasts tab, review the amounts listed and determine if they are ready to be submitted.

- Initially, your name appears in the title bar and above `Find a Forecast:`, indicating that you are viewing your own forecast. Users with the appropriate permissions can click the magnifying glass icon and select another user or role to view that person's forecast. When you are viewing a forecast other than your own, the role or username will be displayed in the title bar and above `Find a Forecast:`. In addition, your access level will be displayed above `Find a Forecast:`.

 **Note:** User Sharing does not fully support Customizable Forecasting. You'll see all users in the organization regardless of the organization-wide default for the user object.

- If your organization uses manual forecast sharing, click **Sharing** to view the forecast sharing settings or to share the forecast with other users.
- If your organization uses territories, choose an option from the `Territory` picklist to summarize the forecast by that territory. See [Territory Management](#).
- If your organization uses product families, choose an option from the `Product Family` picklist to summarize the forecast by that product family. Choosing `--All--` product families disables the **Submit**, and **Forecast History** options; choose another product family to use these options. See [Define Customizable Forecast Settings](#) for information on customizing your organization to use product families.
- If your organization forecasts on both revenue and quantity, select whether to include revenue, quantity, or revenue and quantity. This controls which information is displayed for each amount listed.
- Select a date range under `Range Start` to view another forecast period. Forecast details for opportunities that closed more than two years before you implemented Customizable Forecasting or more than 10 years in the future are not available.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To see forecasts of other users:


- View All Forecasts

To override your forecast:

- Override Forecasts

 **Note:** Organizations that implemented Customizable Forecasting prior to the Salesforce Winter '07 release can see forecasts outside of this range.

- Select a **Range Length** to view fewer or more forecast periods.

 **Note:** If you are using custom fiscal years, periods before the first defined custom fiscal year or after the last defined fiscal year use calendar months or calendar quarters (depending on your forecast setting) for the range start and period length.

- Select an option next to **Display Units** to view forecast totals using a different unit of measurement. To display what portion each total is of your quota, choose **% Quota**.

## Viewing Forecast History

When viewing a forecast from the Forecasts tab, click **Forecast History** to view snapshots of your forecast data taken when you submit it. You can also view the submitted forecasts of subordinates users. Click **Forecast Summary** to return to the previous view.

## Viewing Forecast Amount Details

Select the Forecasts subtab to see forecast details. Click any forecast amount to view details of the opportunity amounts included in that forecast amount. From the details page, click any item listed to view it. Click **Edit** to override that item. See [Overriding Customizable Forecasts](#) for instructions on overriding forecast amounts from the opportunity.


If you have direct reports (users that report directly to you), their forecasts display below yours. The **Choose a view** option allows you to change the way forecast information is displayed for your direct reports. Use this option to group forecast data by subordinate or forecast period.

- **View by Period** displays a list of direct reports and their forecasts for each forecast period. Click any name to view the forecast for that user.
- **View by Direct Report** displays a list of forecast totals for each direct report. Click **View** next to any subordinate name to view the forecast for that user.
- Clicking any amount displays the opportunities and forecast overrides included in that amount.

## Viewing Opportunities

Select the Opportunities subtab to see the opportunities that are included in the displayed forecast. On the Opportunities subtab, you can choose, or create, a list view to further filter the displayed opportunities. Click any opportunity to see the opportunity details. To override the opportunity, click **Edit**. For more information on overriding opportunities, see [Overriding Customizable Forecasts](#).

If you have the “View All Forecasts” permission, you can see opportunities on the Opportunities subtab regardless of their sharing settings.

 **Note:** When a [partner portal is transferred to another account](#), the opportunities on each account are automatically recalculated through your organization's forecast hierarchy.


SEE ALSO:

[Customizable Forecasting Overview](#)

[Managing Customizable Forecasts](#)



## Overriding Customizable Forecasts

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

You can make your forecast a more accurate assessment of your forecasted sales by overriding forecast amounts as needed. Any user can override a forecast from the opportunity by changing the `Stage or Forecast Category` of the opportunity. Users with the “Override Forecasts” permission can override their forecast or any direct report’s forecast at the forecast level.

When an opportunity moves from one forecast category to another, such as from Best Case to Commit, the unadjusted raw amounts change for each of those categories, but any amounts with overrides do not change. You should update or remove your overrides to each forecast category to account for changes in the stage of opportunities.

### Overriding Your Forecast from the Opportunity

1. Click the Opportunities subtab on the Forecasts page.
  2. Click **Edit** for the opportunity you want to override.
  3. Make any changes to the details. The options available differ depending on whether you own the opportunity.
  4. If products are on the opportunity and you want to change the forecast category for that product, select **Change Category**, then select the appropriate `Product Forecast Category`.
  5. Click **Save**. The opportunity is marked with the appropriate icon indicating its override status. For a description of each override icon, see [Forecast Override Indicators](#).
- Click **Save & Refresh** to update the record and redisplay the totals.

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS


To see forecasts of other users:

- View All Forecasts


To override your forecast:


- Override Forecasts

### Overriding Your Forecast Total

1. Click the Forecasts subtab on the Forecasts page.
2. Click the edit icon (  ) to override the adjusted total.
3. Enter a new amount and any comment.
4. Click **Save**. The forecast is marked with the appropriate icon indicating its override status. For a description of each override icon, see [Forecast Override Indicators](#).

### Overriding the Forecast of Your Direct Reports

1. Click the Forecasts subtab on the Forecasts page.
2. Click the edit icon (  ) to override your direct report's forecast.
3. Choose one of the override options to control which override amounts, if any, are included in the forecast:
  - **Accept John Doe's forecast**—Use this option to accept the forecast of your direct report, including any overrides that he or she has made.
  - **Reject any override on John Doe's forecast, but accept forecast overrides from other subordinates**—Use this option to ignore overrides made on your direct report's forecast, but include any overrides made on forecasts further down in the hierarchy.

- **Reject all forecast overrides**—Use this option to ignore all forecast-level overrides but include opportunity-level overrides. If you have overridden amounts at the opportunity, your own opportunity forecasts are used in this calculation. Choose this option if you want forecast amounts to be based on opportunity amounts including overrides made at the opportunity level.
  - **Override the forecast and set it to**—Use this option to enter an amount that replaces the current amount in your forecast. Your manager will see this amount in your forecast but your subordinates will not.
4. If you forecast on both revenue and quantity, choose an override option for quantity forecast.
5. Click **Save**. The forecast is marked with the appropriate icon indicating its override status. For a description of each override icon, see [Forecast Override Indicators](#).
-  **Note:** The Forecasts tab is unlike other tabs in that it automatically calculates data for you based on your opportunity data. You do not need to create or delete forecast records.


SEE ALSO:

[Customizable Forecasting Overview](#)

[Managing Customizable Forecasts](#)

## Override Customizable Forecasts from an Opportunity

A forecast override is an amount that more accurately represents your forecasted sales. You can view a list of overrides and make changes from the opportunity detail page.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

1. From the Opportunity Forecasts related list on an opportunity record, click **Edit**.
2. Make changes to the details. See [Overriding Customizable Forecasts](#) for instructions on overriding opportunity forecast amounts.

If your organization uses territory management, the territory to which the opportunity is assigned displays in the **Territory** drop-down list.

If you are a forecast manager for multiple territories, the drop-down list shows the territories from which you can override the opportunity. Choose a value and click **Edit** to override the opportunity from the desired territory.



SEE ALSO:

[Territory Management](#)

## Forecast Override Indicators

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

An icon displays for each override to indicate the status of the override. Use the following table to determine the status of an override.

Icon	Override Status
	The opportunity has been updated since an override.
	A subordinate has overridden the 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 view forecasts of other users:

- View All Forecasts

To override your forecast:

- Override Forecasts

Icon	Override Status
	A person that reports directly to you has overridden the forecast.
	You have overridden the forecast.
	The forecast data is not up-to-date. Refresh your browser in a few minutes.

SEE ALSO:

[Overriding Customizable Forecasts](#)

## Customizable Forecast Fields

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

Here is a description of the fields (in alphabetical order) that make up a forecast in customizable forecasting:

### Forecast Fields

Field	Description
Comments	The comments you enter when overriding your forecast.
Forecast Category	<p>Category determined by the opportunity Stage value. Options are:</p> <ul style="list-style-type: none"> <li>• <b>Omitted</b> means the amount does not contribute to your forecast.</li> <li>• <b>Pipeline</b> includes amounts from all open opportunities.</li> <li>• <b>Best Case</b> includes amounts you are likely to close, closed/won opportunity amounts, and amounts in the Commit category.</li> <li>• <b>Commit</b> includes amounts you are confident about closing and closed/won opportunity amounts.</li> <li>• <b>Closed</b> includes amounts for closed/won opportunities.</li> </ul>
Forecast Item	Record that contributes to the forecast. This displays in the detail of a forecast amount.
Revenue	The total expected revenue amount from the opportunities that fit in a given category.

### EDITIONS

Available in: Salesforce Classic

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

Field	Description
Quantity	The total number of units that are forecasted to sell as part of the opportunities in a given category.
My Forecast Override	The amount you enter when overriding a forecast amount.
Submitted By	The user who submitted a forecast.
Type	Type of override. Options are "Opportunity" or "Forecast Override."


## Opportunity Forecast Fields

Opportunity Forecast Field	Description
My Forecast Amount	The amount you enter when overriding your direct report's opportunity amount.
My Forecast Category	The category selected when you override the category of an opportunity.
My Forecast Comments	The comments you enter when overriding one of your opportunities or the opportunity of a direct report.
My Forecast Period	The period you selected when overriding a direct report's opportunity period.

SEE ALSO:

[Managing Customizable Forecasts](#)

## Manually Sharing a Forecast

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

Your administrator defines your organization's forecasting hierarchy, which determines which users can view the forecast data. However, your administrator can manually extend sharing privileges for forecast data, and you may be able to manually extend sharing privileges for your own forecast data as well. Manual forecast sharing can only increase access to forecast data; it cannot restrict access for users who already have access. To manually share a forecast, you must be an administrator or a forecast manager who has been given access to share your forecast data.

To see which users can view your forecast or to share your forecast data, do one of the following:

- From Setup, enter *Forecasts Hierarchy* in the Quick Find box, then select **Forecasts Hierarchy**, then click **Share** next to the view you want to share.
- Click **Sharing** on the forecast home page to share your own forecast data.

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:


### EDITIONS

Available in: Salesforce Classic


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

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 <b>Sharing</b> button on the forecast.
Forecast Manager	A user has access due to being a forecast manager in the forecast hierarchy.
Owner	The owner can always see his or her own forecast data.
View All Forecasts Permission	The user has the “View All Forecasts” permission.

On the Forecast Sharing Detail page, you can do any of the following:

- To show a filtered list of items, select a predefined list from the **View** drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the **View** drop-down list and click **Edit**.
- Click **Add** to grant other users or groups access to the forecast data.
  -  **Note:** Manual sharing extends to the opportunity data that makes up the forecast. If a user has permission to override forecast data, then the user also has permission to override the opportunity forecast data.
- Click **Expand List** to view all users that have access to the forecast data.
- For manual sharing rules that you created, click **Edit** or **Del** next to an item in the list to edit or delete the access level.

## Submitting Customizable Forecasts

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

On the Forecasts tab, your forecast totals are always available to you and users above you in your role hierarchy. However, forecast totals are only available in forecast history and reports after you submit them. You can submit your own forecast or any forecast data that has been manually shared with you and you have permission to submit.

To submit your forecast:

1. Click **Submit** from your forecast on the Forecasts tab.
2. Click **OK** to confirm. Salesforce takes a snapshot of your forecast totals and makes them available in reports and your forecast history.

SEE ALSO:

[Viewing Customizable Forecasts](#)

[Managing Customizable Forecasts](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To see forecasts of other users:

- View All Forecasts

To override your forecast:

- Override Forecasts

## Selling Through Multiple Channels

### Drive Sales with Partners

Partners are the companies with which you collaborate to close your sales deals. For each opportunity or account you create, the Partners related list allows you to store information about your partners and the roles they play in the opportunity or account. A partner must be an existing account within Salesforce.

If your organization has been enabled for partners, you can create partner accounts. Partner accounts are business accounts that a channel manager uses to manage partner organizations, partner users, and activities. ***They are completely separate from account partnerships that are displayed in the Partners related list on an account.*** For more information about creating and managing partner portals, see [Create and Manage Partner Portals](#).



**Tip:** If your organization uses person accounts, you can use partner roles to relate person accounts to each other. For example, if you have individual person account records for several members of a household or family, then you can use partner roles such as “Spouse” or “Sibling” to associate those records.

### Sharing Information with Partners

Partners are companies or individuals that directly drive sales or help you close sales deals.

You can track partner sales in your Salesforce org in different ways.

- [Add partners](#) to account and opportunity records.
- Enable your org for partners, create partner accounts, create partner users, and collaborate with them on your channel sales data in a partner community (recommended) or partner portal.
- Use [Salesforce to Salesforce](#) if your partner has a Salesforce org of their own.

#### 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

#### EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

## Viewing and Adding Partners

The opportunity and account detail pages include a Partners related list for viewing and adding partner relationships.

- To view account information for a specific partner, click the partner's name in the Partners related list.  
If you do not have access to view and edit a partner account, the account name appears in the related list but you have no access to other information about that account.
- Click **Del** next to a partner to the partner relationship.



**Note:** If you change the account for an opportunity that has partners, all partners are deleted from the Partners related list.

- To add a partner to an opportunity or account:
  - Click **New** in the Partners related list.
  - For opportunities only, select the **Primary** option to indicate the primary partner for the opportunity, if applicable.  
An opportunity can have only one primary partner. Setting a new primary partner automatically removes the "Primary" status from any existing primary partner.  
Marking a partner as "Primary" allows you to report on the partner in all of the opportunity reports.
  - In the **Partner** column, enter the name of an existing account by typing into the box or clicking the lookup icon to perform an account search. Alternatively, click **New** from the lookup dialog to create a new account.
  - In the **Role** column, choose the role that the partner account plays in the current account or opportunity.



**Note:** Selecting a partner on an account or opportunity automatically creates a reverse partner relationship so that both accounts list the other as a partner. The role you select is applied to the partner account; in the current account, the reverse role is applied.

Your administrator sets the available roles and the corresponding reverse roles when editing the **Partner Role** picklist value.

Your administrator has the ability to customize the columns that display in the related list by editing the page layout.

### EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

### USER PERMISSIONS

To add partners to an account:

- Edit on accounts  
AND  
Read on opportunities

To add partners to an opportunity:

- Read on accounts  
AND  
Edit on opportunities

## Partner Fields

A partner has the following fields, listed in alphabetical order.

Field	Description
Partner Name	Name of partner. You can enter an existing account, or use the lookup icon to search for (or optionally, create) a new account.
Primary	Option that specifies the primary partner for the opportunity.
Role	Role of partner for a specific opportunity or account. The role is correlated to the reverse role, applied to the reverse partner relationship. Select from a picklist of available roles, which are set by an administrator.

## Deleting Partners

Removing a partner from an opportunity or account removes the partner's relationship with the opportunity or account, but does not delete the account.



**Note:** If you change the account for an opportunity that has partners, all partners are deleted from the Partners related list.

To remove a partner relationship from an opportunity or account, click **Del** next to the partner's name.

Removing a partner affects an opportunity or account in the following ways.

Deleting a Partner From	Does This
An account	Removes the partner from the account and from <i>all</i> opportunities for that account with which the partner was associated.
An opportunity	<p>If the partner is associated with only one opportunity for an account, the partner is removed from both the opportunity <i>and</i> the account.</p> <p>If the partner is associated with multiple opportunities for an account, the partner is removed from that opportunity <i>only</i>. The partner remains associated with other opportunities <i>and</i> with the account.</p>

### 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

### 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 delete partners from an account:

- Edit on accounts

To delete partners from an opportunity:

- Edit on accounts

AND

Edit on opportunities



## Create a Partner Portal

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

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

For detailed information about creating a partner portal, see the [Create and Manage Partner Portals](#) guide. Generic information about user management, sharing, and CRM data remains available from the Salesforce help.

### EDITIONS

Available in: Salesforce Classic

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

## Salesforce to Salesforce

### Salesforce to Salesforce Overview

Salesforce to Salesforce enables business collaboration both within and across Salesforce organizations. This allows you to share [certain records](#) with your business partners that use Salesforce and get updates on the shared data. For example, you can share lead and opportunity data with business partners and manage your entire pipeline and programs within Salesforce.

Salesforce to Salesforce allows you and your business partners to collaborate more easily and effectively. With Salesforce to Salesforce, you can share records with one or more connections, and each connection can accept records you share with them - even if other connections have accepted the same record.

Salesforce to Salesforce allows your business partners to:

- Access all their programs from one place
- Easily integrate your data with the data they manage in Salesforce
- Integrate their business processes with updates received from you

Salesforce to Salesforce allows you to:

- Have 100% visibility into your partner activity
- Manage your entire pipeline, both internal sales and channel sales, in one place
- Rapidly and easily share data across multitiered partnerships
- Integrate your business processes with updates received from your partners using workflow and assignment rules



**Note:** Because updates to shared records are processed asynchronously and retried if a sync fails, they don't appear in the partner's org right away.

If you want to connect to partners but aren't sure if they use Salesforce, you can use [connection finder](#) to find out.


If you receive an invitation to connect with a business partner using Salesforce to Salesforce, see [Accepting or Rejecting an Invitation to Join Salesforce to Salesforce](#) on page 359.

To invite other companies to connect with you using Salesforce to Salesforce, see [Inviting Business Partners to Connect using Salesforce to Salesforce](#).

### EDITIONS

Available in: Salesforce Classic

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

 **Note:** Salesforce to Salesforce doesn't just let you share information with business partners; it's also part of a high-availability solution called Organization Sync. For information about Organization Sync, see Organization Sync.


SEE ALSO:

[Tips for Using Salesforce to Salesforce](#)

[Finding Out if Your Partners Use Salesforce](#)


## Inviting Business Partners to Connect using Salesforce to Salesforce

Before you can start sharing data with your business partners, you need to set up a connection to them using Salesforce to Salesforce. To create that connection, you need to invite your business partner.

 **Note:** Before beginning the invitation process, you need to create an account and an associated contact for your business partner.

To invite a business partner to connect using Salesforce to Salesforce:

1. Click the Connections tab.
2. Click **New**.
3. Enter a contact name or use the lookup icon to select a contact.

 **Important:** Make sure that the email address is valid; otherwise, your invitation may be sent to the wrong person.


4. Optionally, select a related account.

 **Note:** The account associated with the connection can be changed after the invitation is sent.

5. Choose a user to manage the connection.
6. Optionally, choose a template to apply to the connection.
7. Click **Save & Send Invite**.

To invite multiple business partners to connect using Salesforce to Salesforce:

1. Click the Contacts tab.
2. Select a standard or custom list view, then click **Go!**.
3. In the list view, select the checkboxes next to the contacts you want to invite.

 **Important:** Make sure that the email addresses are valid; otherwise, your invitations may be sent to the wrong people.

4. Click **Invite to Connect**.
5. Choose a user to manage the connection.
6. Optionally, choose a template to apply to the connection.
7. Click **Save & Send Invite**.

The people you invite will receive an email invitation to connect with you using Salesforce to Salesforce. They can choose to accept or decline your invitation. You can check whether they have accepted or declined the invitation by reviewing your connections on the

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To invite to a business partner to connect using Salesforce to Salesforce:

- Manage Connections

Connections tab. From the Connections tab, you can also resend or cancel the invitation. To learn more about connections, see [Connections Home Page](#) on page 360.



**Note:** For information about sending an Organization Sync replication connection invitation in Salesforce to Salesforce, see [Connect the Organizations](#).

#### SEE ALSO:

[Finding Out if Your Partners Use Salesforce](#)

[Connection Templates in Salesforce to Salesforce](#)

[Creating and Applying Connection Templates](#)

## Accepting or Rejecting an Invitation to Join Salesforce to Salesforce

If a business partner sent you an invitation to connect using Salesforce to Salesforce, you can accept or reject that invitation by following these steps:

1. Click the link in the invitation email to go to the Salesforce login page.
2. Log in as the System Administrator or as a user with the "Manage Connections" permission.
3. Review the details of the invitation.
4. Click **Accept** or **Decline**.

If you aren't sure whether you want to accept or decline, click **Decide Later**. The invitation displays on the Connections tab with a connection status of Invitation Received. You can easily accept or decline it at a later date.

When you accept or reject an invitation, the company that invited you receives an email notifying them of your decision. The content of that email can be configured by changing the appropriate email template.

#### SEE ALSO:

[Salesforce to Salesforce Overview](#)

[Tips for Using Salesforce to Salesforce](#)

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To accept or reject an invitation to connect using Salesforce to Salesforce:

- [Manage Connections](#)

## Connections Home Page

The Connections tab allows you to manage your Salesforce to Salesforce connections and connection templates. From the Connections tab, you can:

- Select the Connections subtab to manage connections. Connections include everyone that you have invited, whether they have accepted, declined, or have not yet responded, as well as all the invitations you have received. Recent connections are automatically displayed on the Connections subtab.
  - To view details about a connection, click the connection name.
  - To invite new connections, click **New**, then enter the connection details and click **Save & Send Invite**.
  - To deactivate a connection, click **Deactivate**.
  - For invitations to connect that have been sent but not accepted, you can click **Resend** to resend the invitation, or **Cancel Invitation** to cancel the invitation. For more information about inviting connections, see [Inviting Business Partners to Connect using Salesforce to Salesforce](#) on page 358.
- Select the Templates subtab to manage connection templates. Templates allow you to define and publish sets of objects and fields to one or more standard Salesforce to Salesforce connections. Recent templates are automatically displayed on the Templates subtab.
  - To show a filtered list of items, select a predefined list from the **View** drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the **View** drop-down list and click **Edit**.
  - To view details about a template, click the template name.
  - To create a new template, click **New**.
  - To edit a template, click **Edit** next to the template you want to edit. For more information about using templates, see [Creating and Applying Connection Templates](#) on page 362.



**Note:** To learn about Organization Sync, a high-availability feature built on the framework of Salesforce to Salesforce, see [Organization Sync](#).

SEE ALSO:

[Managing Connections](#)

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To view and manage connections for Salesforce to Salesforce:

- Manage Connections

To view and manage templates for Salesforce to Salesforce:

- Manage Connections

## Managing Connections

From the Connections tab, you can view connection details and manage connections. The connection details include information on the status of the connection, the owner of the connection, information about the company, published and subscribed fields, and a connection history.

To view a connection:

1. Click the Connections tab.
2. On the Connections subtab, click the name of the connection that you want to view.

From the connection detail page, you can:

### Accept an Invitation

If a business partner has sent you an invitation to connect using Salesforce to Salesforce, click **Accept** to accept the invitation. After you accept the invitation, you can subscribe to objects that the connection has published and begin sharing objects with the connection using the Published Objects and Subscribed Objects related lists on a connection detail page.

### Cancel an Invitation

If an invitation you sent hasn't been accepted, you can cancel the invitation by clicking **Cancel Invitation**. If your partner hasn't received the invitation, click **Resend** to send it again.

### Deactivate Connections

If you have created a connection with a business partner and you no longer wish to use the connection, click **Deactivate**. If a connection is deactivated, you can still view and update records that your connection shared with you, but updates you make won't be sent to your connection. If you sent records to your connection that they didn't accept, the records are removed from their organization, and vice versa.

### Edit Connections

When displaying the connection, you can modify the connection by editing the connection details. To change the objects published to a connection, click **Publish/Unpublish**, or to use a connection template, click **Edit** and select an active template. To edit the published fields on an object, click **Edit** next to the object. To change the objects you're subscribed to, click **Subscribe/Unsubscribe**. For more information, see the following:

- [Publishing Objects in Salesforce to Salesforce](#) on page 371
- [Subscribing to Objects in Salesforce to Salesforce](#) on page 364
- [Publishing Fields in Salesforce to Salesforce](#) on page 372
- [Subscribe to Fields in Salesforce to Salesforce](#) on page 365

### View Connection History

You can view a detailed history of the connection in the Connection History related list of the connection detail page. To export the connection history, select **Download connection history (csv)**. This lets you download a comma-separated values file that includes the following information:

- Connection status changes
- Changes to which account is associated with the connection
- Changes to which contact is associated with the connection
- Connection owner changes
- Changes to published fields
- Email communications sent to your business partners
- Errors related to validation rules and Apex triggers with validation rules resulting from:
  - Records manually accepted

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To manage connections:

- Manage Connections

- Records automatically accepted
- Records updated by Connection User

 **Note:** System errors, for example, code errors, aren't logged in the Connection History.

#### SEE ALSO:

[Connections Home Page](#)

[Connection Templates in Salesforce to Salesforce](#)

## Connection Templates in Salesforce to Salesforce

Connection templates allow you to define objects and fields that can be published to connections. Connection templates can be assigned to one or more standard Salesforce to Salesforce connections, making the process of publishing fast and easy. From the Connections tab, click the Templates subtab to view, create, and edit connection templates.

When a connection template is applied to a connection, the object and field rules are applied to that connection.

The following rules apply to connection templates:

- Objects and fields that are not already published but are published in the connection template are published.
- Objects and fields that have the same publish or unpublish status as the template are unchanged.
- Objects and fields that are already published but are not published in the connection template are unpublished.

#### SEE ALSO:

[Creating and Applying Connection Templates](#)

[Connections Home Page](#)

## Creating and Applying Connection Templates

### Creating and Editing Connection Templates

Connection templates allow you to define object and field publishing rules that can be applied to one or more standard Salesforce to Salesforce connections.

To create a connection template:

1. Select the Connections tab.
2. Select the Templates subtab.
3. Click **New**.
4. Type a name and an optional description.
5. Select the **Active** checkbox if you want to be able to assign the template to standard connections.
6. Click **Save** to save the template, or click **Save & Add Objects** to add objects to the template.

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To create, edit, and view connection templates:

- Manage Connections

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To create, edit, and view connection templates:

- Manage Connections


7. If you clicked **Save & Add Objects**, select the checkboxes next to the objects you want to add, then click **Save**.

 **Note:** If you clicked **Save**, you can click **Add/Remove Objects** on the template detail page to add objects.

8. Click **Edit** next to an object you added to the Published Objects related list.
9. Select the fields you want to publish for the object, then click **Save**.
10. Repeat steps 8 and 9 for each object you added to the Published Objects related list.

To deactivate a connection template:

1. On the Templates subtab, click **Edit** next to the template you want to deactivate. Alternatively, click **Edit** on the template detail page.
2. Deselect the **Active** checkbox.
3. Click **Save**.

 **Note:** Only active connection templates can be assigned to connections. If you want to use a template that you had deactivated, you can do so by selecting the **Active** checkbox.

## Assigning Connection Templates to Connections

You can assign connection templates to connections when [inviting one or more new connections](#), or you can assign connection templates to existing connections.

To assign a connection template to an existing connection:


1. Select the Connections tab.
2. Select the Connections subtab.
3. Click the name of the connection you want to assign the template to.
4. Click **Edit**.
5. In the `Template` field, type the name of the template or click the lookup icon to search for a template.
6. Click **Save**.

SEE ALSO:

[Connection Templates in Salesforce to Salesforce](#)  
[Connections Home Page](#)

## Sharing Records Using Salesforce to Salesforce

Once you have created a connection to another organization, you can share data with them. Your business partners do not have direct access to your record; they have a record in their organization that is connected, using Salesforce to Salesforce, to your record. Any updates to the shared information on either record is reflected on the other record. You can share records with one or more connections. Each connection has the opportunity to accept shared records, even if other connections have also accepted the same record.

 **Note:** Making records available to business partners using Salesforce to Salesforce is not the same as sharing records within your organization.

You can control the type of records you share with your business partners by selecting which objects and fields to publish.

### EDITIONS

Available in: Salesforce Classic

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

In addition, you can control how the information your business partner makes available to you is used in your organization by subscribing to objects and mapping the fields on those objects to fields on your own objects.

Individual records and their related records are made available to your connections by forwarding the record to one or more connections, or by assigning the record to a queue that contains connections. When you forward a record to a connection, you can select which related records to include, and you can send your connection contact an email notification that a record has been made available.

Similarly, your business partners can make records available to you. When a record has been made available to you by a business partner, you can view basic details about the record from a view on the object's home page. Then you choose whether to [accept the record](#), and its related records, or not. Additionally, when [subscribing to an object](#), you can specify that the object's records are automatically accepted when shared by your connection. This is particularly helpful if you're expecting the connection to share a large volume of records.

Once you have accepted a record, you can make it available to other connections in the same way you can make any record available using Salesforce to Salesforce. This allows you to work in a multi-tiered business network. In a multi-tiered network, changes made to the shared record in any organization updates the information in all the organizations that are sharing the record.

#### SEE ALSO:

[Publishing Fields in Salesforce to Salesforce](#)

[Subscribe to Fields in Salesforce to Salesforce](#)

[Tips for Using Salesforce to Salesforce](#)

## Subscribing to Objects in Salesforce to Salesforce

When you are connected to a business partner using Salesforce to Salesforce, you can subscribe to objects that your business partner has published. When you subscribe to an object, you map it to an object in your organization. Standard objects must map to standard objects in your organization, but you can map custom objects to any custom object. For example, if your business partner has published a custom object named Prospects, you can map that to a custom object named Client.

To subscribe to objects for a connection:

1. Click the Connections tab.
2. Click the name of the connection you want to modify.
3. In the Subscribed Objects related list, click **Subscribe/Unsubscribe**.
4. Choose the objects you want to subscribe to by selecting the object in your organization you want mapped to that object. Select **--None--** if you do not want to subscribe to a published object.
5. Select the **Auto-Accept** checkbox next to an object if you want to automatically accept records of that type when shared by your connection. The checkbox appears once you select a mapping.



**Note:** This checkbox is not available for:

- Child objects. Opportunity products, tasks, and public case comments are [automatically accepted](#) when the parent record is accepted. Attachments are automatically accepted if marked public and the **Share With Connections** checkbox is selected.
- Objects that have one or more master objects, such as custom junction objects or detail objects in a master-detail relationship.

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS


To subscribe to published objects :

- **Manage Connections**



Additionally, `Auto-Accept` does not apply to any record that is shared as the child of another record, for example a case record that is the child of a case record that you already accepted.

6. Click **Save**.

 **Note:** If your business partner stops publishing an object to which you are subscribed, you are automatically unsubscribed from that object.

Once you have subscribed to an object, you can [map published fields](#) on that object to fields on your object. For example, you can map the `Description` field on leads to a custom field on leads called `Partner Description`. This would allow you to use your own field to describe the lead for users within your organization rather than using the description provided by your business partner.

## Additional Considerations

- If you choose to auto-accept leads or cases, any active assignment rules in your organization run when a record is automatically accepted.
- In order to automatically accept a record shared by your connection, the connection owner for that record must be an active user.

## Subscribe to Fields in Salesforce to Salesforce



When you accept an invitation from a business partner to join Salesforce to Salesforce, you can subscribe to fields that your business partner has published and map those fields to your fields. When your business partner updates the fields on a record that you're sharing, the fields will be updated on the shared record in your organization.

For example, if your business partner has published the `Description` field, you could map that field to a custom field called `Partner Description`. This would allow you to use your own field to describe the lead for users within your organization.

Before subscribing to fields, see [Best Practices for Mapping Fields in Salesforce to Salesforce](#).

To map fields on a subscribed object:

1. Click the Connections tab.
2. Click the name of the connection you want to modify.
3. In the Subscribed Objects related list, click **Edit** next to an object.
4. Map your business partner's published fields to your organization's fields by choosing the appropriate field in the drop-down list.

 **Note:** Fields can only be mapped to fields with the same data type, length (for text and numeric fields) and decimal places (for numeric fields), so the drop-down list only shows fields with the correct data type. You can see the data type details of a published field by hovering your mouse over the information icon () next to the field. Select `--None--` if you don't want to populate any of your fields with the data from a published field.

5. If the field is a picklist, click **Edit Values** to map each published picklist value to a picklist value in your organization.
6. Click **Save**.

### EDITIONS


Available in: Salesforce Classic

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

### USER PERMISSIONS

To subscribe to published fields :

- Manage Connections

 **Note:** Changes to field mappings and picklist values may not show up in your business partner's organization for up to 15 minutes while Salesforce refreshes the cache. This cache enables us to support larger transaction volumes and reduce the number of API calls that count against your organization's limits.


SEE ALSO:

[Managing Connections](#)

[Publishing Fields in Salesforce to Salesforce](#)

## Best Practices for Mapping Fields in Salesforce to Salesforce

When you subscribe to a field in Salesforce to Salesforce, you map it to a field in your organization. This mapping lets updates to that field sync for all shared records. Before you map fields, look at these important best practices.

 **Important:** This information applies to standard Salesforce to Salesforce connections. If you're mapping fields for a replication connection as part of Organization Sync, some of this information may not apply.

### EDITIONS

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

### Auto-Mapping Fields

- When subscribing to fields, select **Auto-Map Fields** to automatically map your business partner's fields to your fields. After you select this option, click **Save** for your changes to take effect.
- For any unmapped field, Salesforce checks if the field's API name matches that of any of your fields. If there are no matches, Salesforce checks for matching field labels. If Salesforce still can't find a match, `--None--` is selected.
- Selecting **Auto-Map Fields** doesn't overwrite previous selections, and deselecting it doesn't affect fields that were mapped previously.
- The following standard fields are automatically mapped:
  - Account: `Account Name`, and, if you are using person accounts, `Last Name`
  - Attachment: `Body`, `Content Type`, `File Name`
  - Case: `Subject`
  - Case Comment: `Body` and `Published`
  - Contact: `Last Name`
  - Custom Object: `Name`
  - Lead: `Last Name` and `Company`
  - Opportunity: `Name`, `Closed Date`, and `Stage`
  - Product: `Product Name`
  - Task: `Subject`
  - Opportunity Product: `Quantity`, `Sales Price`

### Mapping Picklist Fields

- If a picklist value is mapped to `--None--`, and your business partner enters a picklist value, your picklist field is to the same value. For example, if you subscribe to the Lead Status picklist, and your business partner has the value `Internal` in that picklist, your record gets a lead status of `Internal`.
- To convert a custom field to a picklist field, stop publishing the field, change the field type, then publish the field again.
- When mapping picklist fields, if the subscribed org has the picklist field restricted to the values defined in the value set, and the publishing org does not have this restriction, the field is not available for mapping on the subscribing org.

## Mapping Currency Fields

- If you map a currency field, and a record shared by your connection uses a currency that your organization hasn't enabled, that currency field isn't updated when your organization auto-accepts the record. If you're manually accepting the record, the currency is updated only if your organization uses the same currency as the record.

For example, suppose that your connection has shared an opportunity with you. Your organization uses the Euro only. Your connection updates the opportunity amount to \$300. The opportunity amount isn't updated in your record because your organization doesn't support the U.S. Dollar.

- If you map a currency field and either you or your connection changes the currency on a record containing that field, updates you make to the field are no longer propagated to the other organization, and updates your connection makes to the field aren't reflected in your organization.
- You can map roll-up summary fields to currency fields with the same currency type. For example, a roll-up summary with the currency type `U.S. Dollar` can be mapped to a currency field that uses the U.S. Dollar.

## Mapping Quantity and Revenue Schedules

- If Quantity Schedules or Revenue Schedules are enabled in your connection's organization and you subscribe to the Products object from that connection, you must subscribe to the following fields and map them to matching fields in your organization.

Type of Schedule	Fields to Map
Quantity Schedule	<ul style="list-style-type: none"> <li>– <code>Number of Quantity Installments</code></li> <li>– <code>Quantity Installment Period</code></li> <li>– <code>Quantity Schedule Type</code></li> </ul>
Revenue Schedule	<ul style="list-style-type: none"> <li>– <code>Number of Revenue Installments</code></li> <li>– <code>Revenue Installment Period</code></li> <li>– <code>Revenue Schedule Type</code></li> </ul>

## Mapping Different Field Types

- Only map person account fields to person account fields, and business account fields to business account fields.
- If your connection is using person accounts and you aren't, the person account field `Last Name` is used as the Account Name when your connection shares a person account record with you. If you enable person accounts, you are automatically subscribed to `Last Name`. Any changes to Last Name and Account Name are synced.
- You can't map a standard number field to a custom number field.
- You can map lookup fields to text fields that have a length of 80 or more characters. If your connection edits a lookup field that you mapped to a text field, the text field is updated with their changes.
- You can map auto-number fields to text fields that have a length of 30 or more characters.
- You can map formula fields to fields of the same data type; for example, a formula field that has a number data type can be mapped to a field with a number data type. If a formula field is a text data type, it can be mapped to a text field with a length of 80 or more characters. Conversely, fields can't be mapped to formula fields; for example, a formula field with a currency data type can be mapped to a currency field, but a currency field cannot be mapped to a formula field. System audit fields are not supported.

## Unsubscribing to Fields

- You are automatically unsubscribed from a field if:

- Your business partner stops publishing the field
- You delete a custom field that is mapped to a published field
- The field type of a custom picklist or custom multi-select picklist is changed (for example, if a custom picklist is changed to a text field)

## Accepting Records Shared from a Connection

Salesforce to Salesforce allows you to accept records that have been made available to you by business partners with whom you have connections. When accepting a record, you can assign it to yourself, another user, a queue, or, if it is a lead or case, use your organization's assignment rules to automatically assign it. If the record is a child of another record you have accepted, you can assign it to the parent record when accepting it. Additionally, when [subscribing to an object](#), you can specify that the object's records are automatically accepted when shared by your connection.

If validation rules prevent you from accepting shared records, create a validation rule with the `Received Connection Name` field not equal to null; this will ignore validation rules for records you accept from your connections. To create this rule, use the following formula:

```
IF(OR(ISNEW(), ISNULL(Id)), if(ConnectionReceivedId = null,
TRUE, FALSE), NOT(AND(ISCHANGED(ConnectionReceivedId),
NOT(ConnectionReceivedId = null))))
```

You should also create a similar rule for any Apex trigger that has validation checks.

To accept records that have been made available to you:



**Note:** When you manually accept a record, it takes some time for all mapped fields on the record to be updated.

If an error occurs when accepting a record, see the Connection History for details.

1. Select the tab of the record type you are accepting.
2. Select a connections list view and click **Go!**. For example, on the Leads tab, in the **Leads from Connections** section, select a list view from the drop-down list and click **Go!**.
3. For accounts, contacts, and opportunities, click **Accept** next to the record you want to accept. For cases, leads and custom objects, select the checkbox next to the records to accept, then click **Accept**.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To accept shared records:

- Read and Edit on the object

To view records shared by a connection:

- Manage Connections or have access to the list view



**Note:** If a record is a child of a record you have accepted, the name of the parent record is displayed in the Parent Record Name column. If the record is a parent record or has no parent record, this column is blank.

When you accept a record that has public attachments, the attachments are automatically accepted if you selected the `Share With Connections` checkbox on the attachment.

## Accepting Opportunity Records

When you accept an opportunity, you have the option to relate the opportunity to an object and a price book, and to relate the opportunity to a new account or opportunity, or to use an existing account or opportunity. If you create a new opportunity or account, you can also set the owner of that record.

## Accepting Account Records

When you accept an account, you have the option relate the account to another object and to create a new account, or to use an existing account. If you create a new account, you can also set the owner of that record.

## Accepting Contact Records

When you accept a contact, you have the option relate the contact to another object and to create a new account or contact, or to use an existing account or contact. If you create a new contact or account, you can also set the owner of that record.

## Accepting Case, Lead, and Custom Object Records

When you accept a case, lead or custom object, you have option to relate the case, lead or custom object to another object and to assign the lead or custom object to a new owner.



**Note:** If you choose to `Assign using active assignment rule` and no assignment rule criteria is met, the lead, case, or custom object is assigned to the Default Lead, Case, or Custom Object Record Owner.

## Accepting Product Records

When you accept a product, you have the option to create a new product or relate the product to an existing product.

## Additional Considerations

- After accepting a shared record, if you update a field that your business partner has subscribed to, the field is automatically updated on the record in your business partner's organization. Likewise, if your business partner updates a field to which you have subscribed, it is automatically updated in your organization. When your business partner updates the record, the `Last Updated By` field will be set to "Connection User".
- Once you have accepted a record, you can make it available to other connections in the same way you can make any record available using Salesforce to Salesforce. This allows you to work in a multi-tiered business network. In a multi-tiered network, changes made to the shared record in any organization updates the information in all the organizations that are sharing the record.

- When your business partner shares child records at a later time using the **Manage Connections** link in the related list of a record you have already accepted, the [child records can be automatically added](#) to your organization.

## SEE ALSO:

[Sharing Records Using Salesforce to Salesforce](#)[Connections Home Page](#)[Tips for Using Salesforce to Salesforce](#)


## Automatically Accepting Related Records From a Connection

### Rules for Automatically Accepting Related Records From a Connection

When you share records using Salesforce to Salesforce, you can also share child records. When you accept a record from a connection, or when your connection accepts a record from you, the child records can be automatically accepted provided that certain criteria are met. Similarly, when a child record is shared at a later time using the **Manage Connections** link in the related list, and the parent record has already been accepted, the child record can be automatically accepted.

In order for a child record to be accepted automatically, the following criteria must be met:

- The parent record must already be accepted in the organization.
- The record must be related as a child to the parent record.
- The child record cannot have two master records.
- The child record cannot have multiple relationships to the same parent object.
- The connection owner must be an active user.
- The owner of the parent record must be an active user.

 **Important:** When child records are accepted automatically, there may be a slight delay before they are visible in the related list of the parent record. Additionally, when a child record is shared using the **Manage Connections** link in the related list of a parent record, there may be a slight delay before the Sent Connection Name displays.

If a child record does not meet the criteria for automatic acceptance, it will need to be manually accepted from its object tab. For example, an opportunity record will need to be accepted from the Opportunities tab. A child record that needs to be manually accepted will display with the parent record name so that it can be properly assigned. For more information, see [Accepting Records Shared from a Connection](#) on page 368.

## SEE ALSO:

[Subscribe to Fields in Salesforce to Salesforce](#)

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To accept or reject records:

- Read and Edit on the record

## Publishing Objects in Salesforce to Salesforce


The objects you publish are the objects that your users can share with your business partners using Salesforce to Salesforce. If you have accepted an invitation, created new custom objects, or you have decided to share more information with your business partner, you may want to publish additional objects. Alternatively, you may find that you want to limit the objects you publish to a particular business partner.

You can publish the following objects:

- Account
- Attachment (unencrypted)
- Case
- Case Comment
- Contact
- Lead
- Opportunity
- Opportunity Product
- Product
- Task
- Custom Object

To define published objects for a connection:

1. Click the Connections tab.
2. Click the name of the connection you want to modify.
3. In the Published Objects related list, click **Publish/Unpublish**.
4. Select the objects you want to publish to your business partner. Deselect objects you no longer want to publish.
5. Click **Save**.

 **Note:** You cannot publish objects that you do not have permission to edit.

When you update your published objects, an email is sent to your business partner notifying them of the change. You can customize this email by editing the Update Connection communication template.

Your business partner is automatically unsubscribed to objects when you:

- Stop publishing an object
- Delete a custom object to which your business partner is subscribed

Once you have published an object, you can manage the fields you publish on that object. For more information on publishing fields, see [Publishing Fields in Salesforce to Salesforce](#) on page 372.

### Additional Considerations

- All custom objects in your organization appear in the list of objects, however, Salesforce to Salesforce only supports deployed custom objects. You cannot forward a record for a custom object that has not been deployed.
- If you publish the case comment object, all public case comments will be shared with your connections. To avoid sharing a comment on a specific case, select **Make Private**.

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To publish objects:

- Manage Connections

- Only unencrypted files are supported

## SEE ALSO:

[Publishing Fields in Salesforce to Salesforce](#)

[Forwarding Related Records to a Connection](#)

## Publishing Fields in Salesforce to Salesforce

When working with a business partner in Salesforce to Salesforce, you control which objects you share with them by publishing the objects. In addition, you can control which fields you publish on those objects. By default, the following fields are published:

- Account: Account Name, and, if you are using person accounts, Last Name
- Attachment: Body, Content Type, File Name
- Case: Subject
- Case Comment: Body and Published
- Contact: Last Name
- Custom Object: Name
- Lead: Last Name and Company
- Opportunity: Name, Closed Date, and Stage
- Product: Product Name
- Task: Subject
- Opportunity Product: Quantity, Sales Price

Salesforce to Salesforce displays the API label for each field.

In addition to those required fields, you may want to publish more fields, or limit the fields you are currently publishing to a particular business partner.

To define published fields for a connection:

1. Click the Connections tab.
2. Click the name of the connection you want to modify.
3. In the Published Objects related list, click **Edit** next to the published object.
4. Select the fields you want to publish to your business partner. Deselect fields you no longer want to publish.
5. Click **Save**.

 **Note:** You cannot publish fields that you do not have permission to edit.

Changes to fields may not show up in the subscribing connection for up to 15 minutes while Salesforce refreshes the cache. This cache enables us to support larger transaction volumes and reduce the number of API calls that count against your organization's limits.

You cannot publish rich text area (RTA) fields.

Geolocation fields and latitude and longitude on standard addresses aren't supported in Salesforce to Salesforce.

When you change which fields you publish, an email is sent to your business partner notifying them of the change. You can customize this email by editing the Update Connection communication template.

Your business partner is automatically unsubscribed to fields when you:

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To publish fields:

- Manage Connections



- Stop publishing a field
- Delete a custom field to which your business partner is subscribed
- Change the type of a field to which your business partner is subscribed
- Change the size or precision of a long text area, text, percent, number, or currency field.

These fields remain published, but your business partner must re-subscribe to them.

Occasionally, new releases of the Salesforce service include new standard fields. Because Salesforce organizations around the world aren't upgraded to new releases simultaneously, you can't publish these new fields to a business partner until their organization is upgraded. Service upgrades occur during scheduled system maintenance periods. To view the system maintenance schedule, go to [trust.salesforce.com](https://trust.salesforce.com).

## Other Tips and Considerations

- When publishing fields, consider sending your business partner information about the fields. This helps them to create a mapping strategy that makes sense for your program.
- Translate your published custom field names into the languages your partners use. This allows them to see the field names in their own language.
- If you're using person accounts, and your connection has not enabled person accounts, the person account `Last Name` is used as the `Account Name` when you share a record. If your connection enables person accounts, they are automatically subscribed to `Last Name`. Any changes to `Last Name` and `Account Name` are synchronized.
- If you want to publish the `Middle Name`, `Informal Name`, and `Suffix` fields on contacts, the fields must be enabled in both your org and your partner's org, or your partner's org must be configured to auto-accept contacts.

SEE ALSO:

[Managing Connections](#)

[Subscribe to Fields in Salesforce to Salesforce](#)


## Making Records Available to a Connection

Salesforce to Salesforce allows you to share records with business partners to whom you are connected. There are two ways to share records: forward records directly to connections, or assign records to a queue of connections. You can share the same records with multiple connections. Once shared, connections must choose to accept the records.


 **Note:** Don't forward a record to the connection that originally shared it. Doing so causes errors when Apex triggers run.

### Sharing a Record with Connections

You can share records with business partners to whom you are connected. You can only forward records that you or your subordinates own; System Administrators can forward all records.

 **Note:** Any lead record you are forwarding must include a populated `Company Name` field.

You cannot forward a record for a custom object that has not been deployed.

1. To forward a record and its related records:
  - View the record's detail page.
  - In the External Sharing related list, click the forward button.
2. To forward multiple records to connections:
  - Select the tab of the type of record you want to forward.
  - Select a list view from the `View` drop-down list, then click **Go!**.
  - In the list view, select the checkboxes next to the records you want to forward. To select all records, select the checkbox in the column header.
  - Click **Forward to Connections**.
3. Select the connection(s) to forward the record to in the Available Connections list.
4. Click the Add arrow () to move the connection(s) to the Selected Connections list.
5. Optionally select **Send Notification Email (new invitees only)** to send email notifying the connection's representative that you forwarded the record. Only new recipients of the record receive the email; connections that you previously forwarded the record to don't receive another email.
6. Optionally select the checkboxes next to related records you want to forward. You can also [share related records separately](#).
7. Click **Save**.

The records are forwarded to the specified connections.

 **Tip:** Certain fields, like currency fields, must be mapped a certain way in Salesforce to Salesforce. For details, see [Best Practices for Mapping Fields in Salesforce to Salesforce](#).

### Sharing Attachments

You can share attachments as child records of any supported object. Attachments are automatically accepted by a connection, providing the following criteria are met:

- The Attachment object type is published to your connection and your connection is subscribed to the object.

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To assign records to a connection:

- Read and Edit on the record

To stop sharing a record:

- Read and Edit on the record

To forward multiple records to a connection:

- Manage Connections

- The parent record for the attachment is shared with the connection.
- The attachment is not marked "Private."
- The **Share With Connections** checkbox on the attachment is selected.
- The attachment is 20 MB or less.

## Stop Sharing Records

To stop sharing a record:

 **Note:** You can only stop sharing records that you or your subordinates own. System Administrators can stop sharing all records.

1. View the record's detail page.
2. In the External Sharing related list, click **Stop Sharing**.

When you stop sharing the record with a connection, changes to the record in your organization are not reflected on the record in the connection's organization. The shared record is not deleted from the other organization.

SEE ALSO:

[Sharing Records Using Salesforce to Salesforce](#)

[External Sharing Related List](#)

## External Sharing Related List

Salesforce to Salesforce allows you to share records with one or more connections; each connection has the opportunity to accept records you share with them, even if other connections have already accepted the same record. When working with a record that you have received from a connection, or a record that you have shared with a connection, the record detail page includes a header indicating the record's status. The record may also contain the External Sharing related list, which shows details on which connections this record is shared with, and the sharing status.

Externally shared records will have one of the following statuses:

### Active (sent)

The record has been shared and accepted by an external organization.

### Active (received)

The record has been sent to you from an external organization, and it has been accepted.

### Pending (sent)

The record has been shared, but not accepted by an external organization.

### Inactive

The record is no longer shared with an external organization.

### Inactive (deleted)

The record was accepted by an external organization, but that organization has deleted the record.

### Inactive (converted)

The record is a lead that was accepted by an external organization and converted into an opportunity by that organization. When a lead is converted, Salesforce to Salesforce inactivates the shared record so that it is no longer updated in the subscribing connection.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To see the external sharing status of a record

- Read on the record

To stop sharing a record:

- Manage Connections



**Note:** If you change the Lead Status during conversion, it is not reflected in the subscribing connection.

#### SEE ALSO:

[Sharing Records Using Salesforce to Salesforce](#)

[Making Records Available to a Connection](#)

## Forwarding Related Records to a Connection


Salesforce to Salesforce allows you to forward records that are children of records already shared with connections. You select the child record types that can be shared when you [share a parent record](#).

Child records are [automatically shared](#) with connections after the parent record has been accepted by the connection, provided certain criteria are met.

Consider the following tips when sharing related records:

- A related record will no longer be shared with a connection if the related record is edited from an unshared record.
- A maximum of 100 tasks per related record can be shared. This maximum includes open and closed tasks.

To stop sharing a related record from its parent record detail page:

1. Select the parent record's detail page.
2. In the related list of the record you want to stop sharing, click **Manage Connections** in the Sent Connection Name column. For example, to stop sharing a contact related to an account, click **Manage Connections** in the Contacts related list on the account detail page.
3. Select the connection(s) that you want to stop sharing with in the Selected Connections list.
4. Click the Remove arrow () to move the connection(s) to the Available Connections list.
5. Click **Save**.

Alternatively, to stop sharing a related record from its detail page:

1. View the record's detail page.
2. In the External Sharing related list, click **Stop Sharing**.

To stop sharing a case comment or attachment, you must make the records private.

#### EDITIONS

Available in: Salesforce Classic

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

#### USER PERMISSIONS

To assign records to a connection:

- Read and Edit on the record

To forward related records to a connection:

- Read and Edit on the record

To stop sharing a record:

- Read and Edit on the record

## Sharing Opportunity Products with Connections

An opportunity product is related to both opportunity and product records. For this reason, it can only be shared as a child record of a shared opportunity, provided the associated product is also shared.


If all of the following criteria are met, opportunity products are automatically shared with connections.

- The Opportunity Product object type is published to your connection, and your connection has subscribed to the object.
- The opportunity and the product associated with the opportunity product are shared with your connection.
- In the connection's organization, the opportunity is associated with an active price book during acceptance.
- In the connection's organization, the product is associated with the same active price book as the opportunity.
- In the connection's organization, the product is active.

- In both organizations, the opportunity currency is the same.

When sharing opportunity products, keep these additional rules in mind:

- If quantity or revenue schedules are enabled in the connection's organization, Quantity and Sales Price fields won't be updated in their organization.
- If the price book associated to the opportunity product is changed or deleted in one organization, the opportunity product will no longer be shared.
- If the opportunity is no longer shared, the opportunity product will no longer be shared.

 **Note:** Currently, if you edit the stage of multiple opportunity records by performing a global find and replace, that change will not be reflected in organizations that you had forwarded the records to in Salesforce to Salesforce.

For example, suppose you perform a global find and replace which causes the stage of all inactive opportunities to change from `Inactive` to `In Review`.

If any of the affected opportunities had been forwarded to a business partner in Salesforce to Salesforce, those opportunities will still be in the `Inactive` stage in your partner's Salesforce organization. For the stage change to be reflected in their organization, they would need to open each affected opportunity, click **Edit**, and click **Save**.

## Sharing Case Comments with Connections

You can share a case comment as a child record of a case. Case comments are automatically accepted by a connection, providing the following criteria are met:

- The Case Comment object type is published to your connection, and your connection has subscribed to the object.
- The case to which the case comment is associated is shared with the connection.
- The case comment is not marked "Private."

SEE ALSO:

[Sharing Records Using Salesforce to Salesforce](#)

## Tips for Using Salesforce to Salesforce

### Managing Connections with Custom Reports

Use custom reports to keep track of Salesforce to Salesforce activity and updates. For details, see [Reporting in Salesforce to Salesforce](#).

#### EDITIONS

Available in: Salesforce Classic

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

Workflow is available in: **Enterprise, Performance, Unlimited, Developer,** and **Database.com** Editions

## Managing Records

- If validation rules prevent you from accepting shared records, create a validation rule with the `Received Connection Name` field not equal to null; this will ignore validation rules for records you accept from your connections. To create this rule, use the following formula:

```
IF(OR(ISNEW(), ISNULL(Id)), if(ConnectionReceivedId =null,
TRUE, FALSE),NOT(AND(ISCHANGED(ConnectionReceivedId),
NOT(ConnectionReceivedId = null))))
```

You should also create a similar rule for any Apex trigger that has validation checks.

- To track records that you are sharing with connections, create a custom report. For example, you can create a custom report that shows all the leads that you have shared with connections that were deleted by the connection:
  - Use the Leads and Connections report type
  - Enter the filter criteria “Status equals Inactive (deleted)”
- Make your view of unaccepted records from connections more useful by creating a custom list view. For example, create a list view that hides unaccepted leads from connections that are more than a month old.



**Note:** You must have the “Manage Connections” permission to create these list views.

- Only users with the “Manage Connections” permission can view objects shared from a connection, therefore, you should create custom list views that you can assign to people who need access to this information.
- If you are expecting to receive large volumes of records from a connection, [enable Auto-Accept for the appropriate objects](#) on page 364. For example, if a connection shares a large number of leads with your organization on a regular basis, select the `Auto-Accept` checkbox next to Opportunity on the Add or Remove Subscribed Objects page.
- To see changes made by a connection, enable field tracking on the object and add the history related list to page layouts. Another option is to create a custom history report that includes the `Received Connection Name` field.
- To automatically assign all incoming leads or cases to a specific user, create an assignment rule that includes the following rule entries:
  - *Received Connection Name contains name of connection*
  - *Created By contains Connection User*

You can do the same with escalation rules.

- If you want to assign a case to a connection using an escalation rule on the case, you must assign the case to a queue where the connection is a member. For example, if you have a connection that acts as your third-party service agency and all cases meeting certain criteria should be escalated to this connection, you must:
  - Create a queue that contains the connection as a member.
  - Create an escalation rule with the appropriate criteria.
  - Add an escalation action that automatically assigns cases meeting the specified criteria to that queue

## Other Tips

- If you want to connect to partners but aren't sure if they use Salesforce, you can use [connection finder](#) to find out.
- When you convert a lead, Salesforce to Salesforce inactivates the shared record and updates the External Sharing related list in your connection's lead record with an Inactive (converted) status. Due to inactivation of the shared record, changes to the Lead Status during conversion aren't reflected in your connection's lead record.

- To learn how to use workflows to automate updates to records and connections in Salesforce to Salesforce, see [Using Workflows in Salesforce to Salesforce](#).

## Reporting in Salesforce to Salesforce

To track Salesforce to Salesforce activity and updates, create custom reports.

When it comes to using custom reporting to efficiently manage your Salesforce to Salesforce connections, the possibilities are endless! Here are some ways you might use custom reports in Salesforce to Salesforce:

- Create a custom report with the Connections with Accounts report type to track connection activity and other connection details. The report only displays connections that are associated with accounts.
- Create custom report types to view connection information for each of your published or subscribed objects.
- Create a custom report to view records that are shared with multiple connections. Alternatively, to view records shared with multiple connections in a list view, add the `Sent Connection Name` field to an existing or new view and verify that enhanced lists are disabled.
- Create a custom report with the Connections with Leads report type to view all leads that you shared with connections and that the connection then deleted.

### EDITIONS

Available in: Salesforce Classic

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

Workflow is available in: **Enterprise, Performance, Unlimited, Developer,** and **Database.com** Editions

## Using Workflows in Salesforce to Salesforce

You can use workflow to automate updates to records and connections in Salesforce to Salesforce.

Workflow rules are only triggered for records shared in Salesforce to Salesforce when:

- You accept a parent record
- A child record is inserted
- You are subscribed to the fields that are configured to trigger the workflow rules

Some suggestions for criteria for workflow rules for Salesforce to Salesforce include:

- `Received Connection Name` field on leads, opportunities, and custom objects
- `Current User` equals `pnet`
- `Last Modified By` field equals `Connection User`

For example, you can create a task for a user every time a connection updates a lead:

1. Create a workflow rule with the following criteria:
  - Evaluation criteria: `Evaluate the rule when a record is: created, and every time it's edited`
  - Run the rule when `criteria are met`.
  - Rule criteria: `"Lead: Last Modified By equals Connection User"`.

2. Add a workflow task.

You can use workflows for many Salesforce to Salesforce processes, including updating values on picklists when a connection has edited the field. When you accept a record, only the following fields trigger workflow rules:

 **Note:** If your organization is set up to automatically accept records, workflow rules are triggered by any field you subscribed to.

### EDITIONS

Available in: Salesforce Classic

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


Workflow is available in: **Enterprise, Performance, Unlimited, Developer,** and **Database.com** Editions

Object	Fields Triggering Workflows
Account	<ul style="list-style-type: none"> <li>Account Name</li> <li>City</li> <li>Country</li> <li>Received Connection Name</li> <li>Sent Connection Name</li> <li>State</li> <li>Type</li> </ul>
Case	<ul style="list-style-type: none"> <li>Case Number</li> <li>Priority</li> <li>Status</li> <li>Subject</li> <li>Type</li> </ul>
Contact	<ul style="list-style-type: none"> <li>Email</li> <li>Last Name</li> <li>Mailing Address</li> <li>Phone</li> <li>Title</li> </ul>
Lead	<ul style="list-style-type: none"> <li>Company</li> <li>Email</li> <li>Industry</li> <li>Lead</li> <li>Lead Source</li> <li>Name</li> <li>No. of Employees</li> <li>Phone</li> <li>Received Connection Name</li> <li>Sent Connection Name</li> <li>State</li> <li>Status</li> <li>Title</li> </ul>
Opportunity	<ul style="list-style-type: none"> <li>Account Name</li> <li>Amount</li> <li>Close Date</li> <li>Name</li> <li>Received Connection Name</li> </ul>



Object	Fields Triggering Workflows
	<ul style="list-style-type: none"> <li>• Sent Connection Name</li> <li>• Stage</li> </ul>
Custom Object	<ul style="list-style-type: none"> <li>• Connection Name</li> <li>• Name</li> <li>• Sent Date</li> </ul>

All subsequent updates made to any fields on accepted records trigger workflow rules.

 **Note:** Sometimes it makes sense to use an Apex trigger instead of a workflow. Suppose that you have a workflow rule that updates a secondary field, **field B**, when **field A** is updated. Even if your Salesforce to Salesforce partner subscribed to fields A and B, updates to field B that are triggered by your workflow rule aren't sent to your partner's organization. This prevents a loop of updates.

If you want such secondary field updates to be sent to your Salesforce to Salesforce partners, replace the workflow with an Apex trigger that uses post-commit logic to update the secondary field.

 **Note:** In bi-directional connections, Salesforce to Salesforce updates are triggered back only on "after" triggers (for example, "after insert" or "after update"), not on "before" triggers.

## Verifying Your Business Partners Use Salesforce

### About Connection Finder

If your partners use Salesforce, it is beneficial to connect your Salesforce organizations so that you can share records and collaborate on relevant business processes. Before you can connect, you need to find out if your partners use Salesforce. Use Connection Finder to email your partners a link to a simple survey asking if they use Salesforce. Survey responses are recorded on the contact and account records for each partner. Once you know a partner's status, you can invite them to connect using Salesforce to Salesforce.

#### EDITIONS

Available in: Salesforce Classic


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

## Setting Up Connection Finder

Connection Finder allows you to email surveys to find out if your partners are Salesforce customers. Once you know a partner's status, you can invite them to connect using Salesforce to Salesforce.

To use connection finder, you must perform the following activities:

1. [Enable connection finder](#) in your organization.
2. [Configure connection finder settings](#).
3. Add the **Find Connections** button to the contacts list view by customizing the search layout. Add the button to the contact detail page by customizing the contacts page layout.
4. Add the `Uses Salesforce` field to the contacts page layout.
5. Add the `Salesforce Customer` field to the account page layout.

 **Note:** The `Uses Salesforce` and `Salesforce Customer` fields also appear on the contact and account records in any Customer Portal or partner portal you set up.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS

To enable Connection Finder and edit settings:


- `Modify All Data`

## Enabling Connection Finder

To activate connection finder:

1. From Setup, enter *Connection Finder* in the `Quick Find` box, then select **Salesforce to Salesforce Connection Finder**.
2. Click **Edit**.
3. Select `Enabled`.
4. Click **Save**.

The connection finder settings are now available to configure. Additionally, the default email template and required related fields are created and available for use.


 **Note:** Disabling connection finder inactivates outstanding surveys and removes the **Find Connections** button. The `Uses Salesforce` and `Salesforce Customer` fields remain on contact and account records, respectively.

## Configuring Connection Finder Settings


You can determine the content and look of the email you send to partners.

1. From Setup, enter *Connection Finder* in the `Quick Find` box, then select **Salesforce to Salesforce Connection Finder**.
2. Click **Edit**.
3. Select an email template.

The default connection finder template is automatically selected. You can also create custom email templates for your survey.

 **Note:** Custom email templates must contain the survey URL. `{!Contact.PartnerSurveyURL}` is available as a contact merge field when creating templates.

4. Optionally, select a logo using the lookup.

 **Note:** You must first upload your logo to the Documents tab and mark it as `Externally Available Image`.

Salesforce recommends adding a branded logo, as it appears at the top of the survey page. If no logo is selected, the logo portion of the survey page remains blank.

5. Click **Save**.

## Finding Out if Your Partners Use Salesforce

If your partners use Salesforce, it is beneficial to connect your Salesforce organizations so that you can share records and collaborate on relevant business processes. Before you can connect, you need to find out if your partners use Salesforce. Use Connection Finder to email your partners a link to a simple survey asking if they use Salesforce. Survey responses are recorded on the contact and account records for each partner. Once you know a partner's status, you can invite them to connect using Salesforce to Salesforce.

1. In the Contact list view, select the partners you want to survey and click **Find Connections**. Alternatively, on a contact detail page, click **Find Connections**.



**Note:** **Find Connections** doesn't appear if:

- The contact record doesn't have a valid email address
- The contact is not associated with an account

If the contact is a person account, **Find Connections** appears in the list view, but shows an error message if the user clicks the button. **Find Connections** does not appear on the contact detail page.

2. Enter a subject for the email.
3. Edit the body text, supplied by the default template, or click **Change Template** to choose a different email template.



**Note:** The default email template is selected by your administrator. You can select a different template or edit the body text, however, you must include the survey URL: `{ !Contact.PartnerSurveyURL }`.

You cannot edit body text if you chose multiple recipients.

4. Click **Check Spelling** to spell check the body text.
5. Click **Preview** to see what your email will look like to the recipient.
6. Click **Send**.

The email is sent to the selected partners, who have 90 days to respond to the survey before the link becomes invalid. The partner's response is recorded in the `Uses Salesforce` field on the partner's contact record and the `Salesforce Customer` field on the account record. A closed activity is also added for the contact.



**Tip:** Salesforce recommends creating a custom list view or custom report so that you can track customer responses in one convenient location.

If the partner's organization uses Salesforce, the survey displays a section asking if the recipient has administrator privileges for Salesforce. If not, the recipient can optionally provide their administrator's contact information and a new contact record is created in Salesforce for that user, unless one already exists.



**Note:** This section doesn't appear if a contact for that partner, whose `Uses Salesforce` value is *Yes*, *admin user*, already exists in your organization.

### EDITIONS

Available in: Salesforce Classic

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

### USER PERMISSIONS


To email partners asking if they use Salesforce:

- Send Email (single recipient)

OR


Mass Email (multiple recipients)

## Tips and Additional Considerations for Connection Finder

- Create a custom list view or custom report to track your survey responses in one location. Add the `Uses Salesforce` field to contact list views and reports. Add the `Salesforce Customer` field to account list views and reports.
  - Create translated versions of the default connection finder template to send to international partners. To do so, clone the default template, make the necessary language changes, and include the survey URL: `{ !Contact . PartnerSurveyURL }`. You can then choose the appropriate template when sending out requests to your partners.
-  **Note:** The survey page is in English, but includes a `Language` drop-down so that recipients can view the survey in their native language.
- When creating validation rules for the `Uses Salesforce` field, use the API value, not the label seen in the user interface. For example:

```
CONTAINS (TEXT (UseSalesforce ), 'YesNotAdmin')
```

<code>Uses Salesforce</code> drop-down value	API value
No	No
No Response	NoResponse
Not Sure	NotSure
Yes, admin user	YesAdmin
Yes, not admin user	YesNotAdmin

- If a partner provides details for their Salesforce administrator, Salesforce checks to see if there is already a contact in your Salesforce organization with that email address. If so, the `Uses Salesforce` field on the contact record is set to *Yes, admin user*. If the field is already set to *No*, it is not updated.
-  **Note:** A partner can only add an administrator if one does not already exist as a contact in your organization.
- The `Salesforce Customer` field is dependent upon the values in its contacts' `Uses Salesforce` field.

### EDITIONS

Available in: Salesforce Classic

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

## Participating in Social Networks from Within Salesforce

### Salesforce for Twitter and Facebook Overview

Salesforce for Twitter and Facebook gives you an easy way to interact with customers and prospects in real-time on Twitter and Facebook, directly from within Salesforce.

Salesforce for Twitter and Facebook users can search, monitor, join, and respond to social media conversations that are relevant to your company, all from within Salesforce. Users can also:

- Find out what people are saying about your company now
- Create cases, contacts, and leads from Tweets and Facebook wall posts and comments
- Share information with Twitter and Facebook communities

### EDITIONS

Available in: Salesforce Classic

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

- Engage with millions of people sharing opinions, asking questions, and looking for help

You can enable Salesforce for Twitter and Facebook by downloading the free app from the [AppExchange](#). You can find more documentation from the Resources section of the app listing for Salesforce for Twitter and Facebook.

## Resources for the Sales Professional

In addition to online help, Salesforce creates guides and tip sheets to help you learn about our features and successfully administer Salesforce.

	For End Users	For Admins
<b>Data.com Clean</b>		
<a href="#">Implementing Data.com Clean</a>	✓	
<b>Account Management</b>		
<a href="#">Getting Microsoft® Outlook® and Salesforce in Sync</a>	✓	
<a href="#">Get Ready to Sync Contacts and Events with Exchange Sync (Beta)</a>	✓	
<a href="#">Tips &amp; Hints for Sales Reps</a>	✓	
<a href="#">Tips for Using Content Deliveries</a>	✓	
<a href="#">Tips for Using HTML Email Templates</a>	✓	✓
<a href="#">Using Force.com Connect for Office</a>	✓	
<a href="#">Salesforce Bulk Mail Merge Process</a>	✓	
<a href="#">Guidelines for Uploading Mail Merge Templates</a>	✓	
<a href="#">Sample Mail Merge Templates (Zip file)</a>	✓	
<a href="#">Getting Started with Force.com Connect Offline</a>	✓	
<a href="#">Tips &amp; Hints for Working with Territories</a>	✓	
<b>Pipeline Management</b>		
<a href="#">Using Customizable Forecasts</a> —For users of Customizable Forecasting. For more information, search for “Customizable Forecasting Overview” in the Salesforce Help.	✓	
<a href="#">Tips &amp; Hints for Products &amp; Schedules</a>	✓	
<b>Mobile</b>		
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