



Get Started with Salesforce

Salesforce, Spring '18



CONTENTS

Get Started with Salesforce	1
What Is Salesforce?	1
Log In, Navigate, and Search Salesforce	44
Verify Your Identity	68
Personalize Your Salesforce Experience	83
Work on Mobile Devices	137
Index	156

GET STARTED WITH SALESFORCE

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

[What Is Salesforce?](#)

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

[Log In, Navigate, and Search Salesforce](#)

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

[Verify Your Identity](#)

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

[Personalize Your Salesforce Experience](#)

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

[Work on Mobile Devices](#)

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

EDITIONS

Available in: **Salesforce Classic**

Available in: **All Editions**

What Is Salesforce?

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

Run your business from anywhere with Salesforce. Use standard products and features to manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

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

[Concepts, Products, and Services](#)

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

[The Salesforce Admin](#)

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

[Salesforce Features and Edition Allocations](#)

Allocations for Salesforce features by edition.

EDITIONS

Available in: **both Lightning Experience and Salesforce Classic**

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

[Data and File Storage Allocations](#)

Storage allocation per Salesforce edition and number of standard licensed users in your organization.

[Maps and Location Service Allocations](#)

Limits for map views per user.

[Supported Browsers, Languages, and Accessibility Standards](#)

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

[Additional Resources](#)

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

Concepts, Products, and Services

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

EDITIONS

Available in: Salesforce Classic

Available in: **All Editions**

Concepts

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

Products and Services

Salesforce includes the following products and services.

Salesforce Applications

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

Lightning Platform

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

AppExchange

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

Salesforce.com Community

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

Terms

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

The Salesforce Admin

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

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

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

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

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

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

Salesforce Editions

We offer bundles of features and services, each geared toward specific business needs.

These bundles, called *editions*, share a look and feel but vary by functionality and pricing. Some customers start with a basic edition and upgrade to a more feature-rich edition as business requirements evolve.


It's easy to learn which features are available in various editions. Just search for features in Salesforce Help. Toward the top of every topic, you can see the editions in which the feature's available. Here's a quick description of each edition we offer.

Edition	What's Great About It
Essentials	Designed for small businesses that want to get started with a CRM system quickly. It includes intuitive walkthroughs and a setup assistant to get started, an easy-to-use UI, and administration tools to customize your deployment as you grow.
Professional	Designed for businesses requiring full-featured CRM functionality. It includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment.
Enterprise	Meets the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to Salesforce APIs, so you can easily integrate with back-office systems.
Unlimited	Maximizes your success and extends it across the entire enterprise through the Lightning platform. It gives you new levels of platform flexibility for managing and sharing all your information on demand. Includes all Enterprise Edition

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Edition	What's Great About It
	functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.
Developer	<p>Provides access to the Lightning platform and APIs. It lets developers extend Salesforce, integrate with other applications, and develop new tools and applications. Developer Edition also provides access to many of the features available in Enterprise Edition.</p> <p> Note: Salesforce doesn't provide technical support for Developer Edition. But you can ask for help from developer community message boards after you register for the Lightning Platform developer website: developer.salesforce.com.</p> <p>We also provide documentation for Developer Edition.</p>

Compare editions and their features in [Salesforce Pricing and Editions](#).

Salesforce Editions That Are No Longer Sold

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

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

Contact Manager Edition

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

Group Edition

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

Personal Edition

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

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

Performance Edition

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

EDITIONS

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

Database.com

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

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

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

SEE ALSO:

[Salesforce Editions](#)

[Database.com Feature List](#)

Salesforce Features and Edition Allocations

Allocations for Salesforce features by edition.

Allocations generally refer to amounts granted based on the edition you purchase. Information for specific feature *limits*, such as the number of total and active rules in your org, are in Salesforce Help; see the topics for using that feature.

Feature	Personal Edition	Contact Manager	Group Edition	Professional Edition	Enterprise Edition	Unlimited and Performance Edition	Developer Edition
Action plans: maximum tasks	N/A				75		
Active lookup filters	5 per object						
Active validation rules per object		20			100	500	100
Attachments: maximum size in the Notes & Attachments related list ¹	N/A	25 MB for file attachments. 2 GB for feed attachments.					
Categories: maximum default categories and hierarchy levels	N/A				<ul style="list-style-type: none"> • 100 categories in a data category group • 5 levels in a data category group hierarchy 		
Category groups: maximum default					5 category groups, with 3 groups active at a time		
Certificates: maximum					50		

Feature	Personal Edition	Contact Manager	Group Edition	Professional Edition	Enterprise Edition	Unlimited and Performance Edition	Developer Edition
Content deliveries: default delivery bandwidth per rolling 24-hour window	20 GB						
Content deliveries: default delivery view counts per rolling 24-hour window	20,000						
Content deliveries: maximum file size for online viewing	25 MB						
Content: maximum file size	<ul style="list-style-type: none"> • 2 GB • 2 GB (including headers) when uploaded via Chatter REST API • 2 GB (including headers) when uploaded via REST API • 38 MB when uploaded via SOAP API • 10 MB when uploaded via BULK API • 10 MB for Google Docs • 10 MB when uploaded via Visualforce 						
Content: maximum libraries	2,000						
Content: maximum number of documents	30,000,000						
Content: maximum number of documents and versions in a 24-hour period (adjustable)	200,000						2,500
Content packs: maximum files	N/A	50					
Custom apps ²	N/A	1		255 To exceed this number, contact Salesforce.	260 To exceed this number, contact Salesforce.	Unlimited	10
Custom big objects	100		N/A	100			
Custom fields per object ³	5	25	100		500	800	500
Custom labels	N/A			5,000			
Custom links: maximum label length	1,024 characters						

Feature	Personal Edition	Contact Manager	Group Edition	Professional Edition	Enterprise Edition	Unlimited and Performance Edition	Developer Edition
Custom links: maximum URL length	3,000 bytes ⁴						
Custom objects ⁵	N/A	5	50		200	2,000	400
Custom objects: deletion of parent records in a many-to-many relationship	N/A		Available unless more than 200 junction object records are associated with the deleted parent record <i>and</i> the junction object has a roll-up summary field that rolls up to the other parent.				
Custom objects: maximum master-detail relationships			2 ⁶				
Custom permissions	N/A				1,000		
Custom profiles: maximum	N/A			2	1,500 per user license type		
Custom settings: cached data allocation	The lesser of 10 MB or 1 MB multiplied by the number of full-featured user licenses in your org (N/A in Contact Manager and Professional Editions)						
Custom settings: maximum fields per setting	5	N/A	100	N/A	300		
Divisions: maximum	N/A			100			N/A
Documents: maximum size of custom app logo	20 KB						
Documents: maximum size of document to upload	5 MB						
Documents: maximum size of file name (with extension)	255 characters						
Entitlement processes and milestones	N/A			You can create up to 1,000 entitlement processes total, with up to 10 milestones per process. If your org was created before Summer '13, its maximum entitlement processes can be lower. Contact Salesforce to increase it.			
External objects ⁷	N/A				100		
Field history tracking: maximum standard or custom fields tracked for standard or custom objects	N/A	20					
File size: maximum in Chatter and on the Files tab	2 GB						
Fiscal years: maximum custom	250						

Feature	Personal Edition	Contact Manager	Group Edition	Professional Edition	Enterprise Edition	Unlimited and Performance Edition	Developer Edition
Formulas: maximum displayed characters after an evaluation of a formula expression	1,300						
Formulas: maximum length	3,900 characters						
Formulas: maximum size when compiled	5,000 bytes						
Formulas: maximum size when saved	4,000 bytes						
Formulas: unique relationships per object	15						
Formulas: VLOOKUP functions per object	10						
Ideas: maximum size of HTML idea comment	N/A			4 KB			
Ideas: maximum size of HTML idea description				32 KB			
Lightning Apps	N/A			10	25	Unlimited	N/A
Lightning pages: maximum components in a region	25						
Master-detail relationship: maximum child records	10,000 ⁸						
Objects: maximum number of deleting combined objects and child records	100,000						
Omni-Channel: maximum pending routing requests ⁹	N/A			100,000			
Omni-Channel: maximum queued work items ¹⁰				30,000 per hour			
Opportunity Teams: maximum members	N/A				30		
Permission sets: maximum (created)	N/A	1		10	1,000		
Permission sets: maximum (created and added as part	N/A		1,500				

Feature	Personal Edition	Contact Manager	Group Edition	Professional Edition	Enterprise Edition	Unlimited and Performance Edition	Developer Edition
of an installed managed AppExchange package)							
Question: maximum characters	N/A			1,000		N/A	
Question: maximum characters (with Chatter Answers Optimize Question Flow enabled)				32,000			
Quote PDF: maximum logo height	N/A			150 pixels			
Quote PDF: maximum logo size				5 MB			
Recycle Bin: maximum records	25 times your MB storage capacity as records. For example, an org with a storage allocation of 2,000MB (2GB) can have 50,000 records in the Recycle Bin: 25 x 2,000 = 50,000 records.						
Reply: maximum characters	N/A			1,000		N/A	
Reply (private): maximum characters (with Chatter Answers Optimize Question Flow enabled)				4,000		N/A	
Reply (public): maximum characters (with Chatter Answers Optimize Question Flow enabled)				32,000		N/A	
Shared Activities	You can relate up to 50 contacts to nonrecurring tasks, nongroup tasks, and nonrecurring events. You can assign one primary contact. All others are secondary contacts.						
Sharing rules	N/A			You can create up to 300 sharing rules per object, including up to 50 criteria-based rules.			
Static resources	A static resource can be up to 5 MB. An org can have up to 250 MB of static resources total.						
Tabs ²	N/A	3	5	1,210 To exceed this number, contact Salesforce.	1,225 To exceed this number, contact Salesforce.	1,225 To exceed this number, contact Salesforce.	100

Feature	Personal Edition	Contact Manager	Group Edition	Professional Edition	Enterprise Edition	Unlimited and Performance Edition	Developer Edition
Tags	<p>A user is allowed a maximum of:</p> <ul style="list-style-type: none"> • 500 unique personal tags • 5,000 instances of personal tags applied to records <p>Across all users, your org can have a maximum of:</p> <ul style="list-style-type: none"> • 1,000 unique public tags • 50,000 instances of public tags applied to records • 5,000,000 instances of personal and public tags applied to records 						
Territories: maximum account assignment rules	N/A				15		
Users: maximum created	1	5	10	Unlimited			2
Users: maximum created (Chatter Free)	N/A	5,000					
Flow	N/A				<p>Each flow can have up to:</p> <ul style="list-style-type: none"> • 50 versions • 2,000 steps <p>Each org can have up to:</p> <ul style="list-style-type: none"> • 500 active flows • 1,000 flows total • 30,000 waiting interviews at a given time • 1,000 events processed per hour • 20,000 defined relative alarm events across all flows and flow versions 		
Web-to-Case: maximum new cases generated in a 24-hour period	N/A			5,000 ¹¹			
Web-to-Lead: maximum new leads generated in a 24-hour period				500 ¹¹			

¹ You can add an attachment to the Attachments related list of a case, solution, campaign, task, or event, or to the Notes & Attachments related list of an account, contact, lead, opportunity, or custom object. If you don't see the related list on task or event page layouts, ask your admin to add it.

²The custom apps and custom tabs that are contained in a managed package that's publicly posted on the AppExchange don't count against the allocations for your Salesforce edition.

³Additional restrictions apply for activities, long text area fields, relationship fields, and roll-up summary fields.

⁴When data is substituted for the tokens in the URL, the link can exceed 3,000 bytes. Some browsers enforce additional limits for the maximum URL length.

⁵The custom objects that are contained in a managed package that's publicly posted on the AppExchange don't count against the allocations for your Salesforce edition. At the same time, an org can't have more than 2,000 custom objects, regardless of the source or namespace of those objects. Soft-deleted custom objects and their data count against your limits. We recommend that you hard delete or erase custom objects you no longer need.

⁶Each relationship is included in the maximum custom fields allowed.

⁷The amount of 100 external objects applies regardless of how many Salesforce Connect add-ons you purchase for your org. External objects don't count toward the amount for custom objects.

⁸As a best practice, don't exceed 10,000 child records for a master-detail relationship.

⁹Maximum objects that can be pending for Omni-Channel routing in an org. When an item is assigned to Omni-Channel-enabled queues, Omni attempts to route it to an available agent. If no agent is available, the work is pending routing. You may experience degraded performance in Omni-Channel Supervisor when queues surpass 10,000 pending routing requests.

¹⁰Maximum records that can be queued per hour in an org, across all Omni-Channel-enabled queues. Each time an item is assigned to an Omni-Channel queue, the platform checks how many items were queued in the preceding hour. If the max has been reached, the item isn't assigned to the queue.

¹¹If your org exceeds its daily Web-to-Case or Web-to-Lead amount, the default case owner or default lead creator receives a notification email that contains information about the case or lead. When your org reaches the 24-hour max, Salesforce stores additional requests in a pending request queue that contains Web-to-Case and Web-to-Lead requests. The requests are submitted when the amount refreshes. The pending request queue has an allocation of 50,000 combined requests. If your org reaches the pending request maximum, additional requests are rejected and not queued. Your admin receives email notifications for the first five rejected submissions. Contact Salesforce Customer Support to change your org's pending request allocation.

SEE ALSO:

[Salesforce Editions](#)

[Data and File Storage Allocations](#)

Data and File Storage Allocations

Storage allocation per Salesforce edition and number of standard licensed users in your organization.

Storage Capacity

Storage is divided into two categories. File storage includes files in attachments, Files home, Salesforce CRM Content, Chatter files (including user photos), the Documents tab, the custom File field on Knowledge articles, and Site.com assets. Data storage includes the following:

- Accounts
- Article types (format: "[*Article Type Name*]")
- Article type translations (format: "[*Article Type Name*] Version")
- Campaigns
- Campaign Members
- Cases

- Case Teams
- Contacts
- Contracts
- Custom objects
- Email messages
- Events
- Forecast items
- Google docs
- Ideas
- Leads
- List Email
- Notes
- Opportunities
- Opportunity Splits
- Orders
- Quotes
- Quote Template Rich Text Data
- Solutions
- Tags: Unique tags
- Tasks


Data Storage

For data storage, Contact Manager, Group, Professional, Enterprise, Performance, and Unlimited Editions are allocated the greater of 1 GB or a per-user limit. For example, a Professional Edition org with 10 users receives 1 GB, because 10 users multiplied by 20 MB per user is 200 MB, which is less than the 1 GB minimum. A Professional Edition org with 100 users receives more than the 1 GB minimum, because 100 users multiplied by 20 MB per user is 2,000 MB.

File Storage

Contact Manager, Group, Professional, Enterprise, Performance, and Unlimited Editions are allocated 10 GB of file storage per org.

Orgs are allocated additional file storage based on the number of standard user licenses. In Enterprise, Performance, and Unlimited Editions, orgs are allocated 2 GB of file storage per user license. Contact Manager, Group, Professional Edition orgs are allocated 612 MB per standard user license, which includes 100 MB per user license plus 512 MB per license for the Salesforce CRM Content feature license. An org with fewer than 10 users will receive a total of 1 GB of per-user file storage rather than 100 MB per user license.

 **Note:** Each Salesforce CRM Content feature license provides an additional 512 MB of file storage, whether Salesforce CRM Content is enabled or not.


File storage and data storage are calculated asynchronously, so if you import or add a large number of records or files, the change in your org's storage usage isn't reflected immediately.

The minimum values in the table below apply to Salesforce and Salesforce Platform user licenses. If your org uses custom user licenses, contact Salesforce to determine your exact storage amount. For a description of user licenses, see [User Licenses](#).

Big Object Storage

Contact Manager, Group, Enterprise, Performance, Unlimited, Developer, and Personal editions are allocated storage for 1 million big object records per org. Contact Salesforce to increase the limit. Big object storage is calculated asynchronously, so new records aren't

immediately reflected. While big object record limits are not actively monitored, Salesforce reserves the right to enforce the limit if necessary.

 **Note:** In most cases, the allocation is enforced and records can't be added once the allocation is exceeded. For active production orgs, the allocation of big object records is enforced contractually.

Salesforce Edition	Data Storage Minimum per Org	Data Storage Allocation per User License	File Storage Allocation per Org	File Storage Allocation per User License
Contact Manager				
Group		20 MB		612 MB
Professional	1 GB		10 GB	
Enterprise				
Performance		120 MB		2 GB
Unlimited				
Developer	5 MB			
Personal	20 MB (approximately 10,000 records)	N/A	20 MB	N/A

SEE ALSO:

[Salesforce Editions](#)

[Salesforce Features and Edition Allocations](#)

Maps and Location Service Allocations


Limits for map views per user.

Maps and location services uses Google Maps to display maps on standard address fields, enable creation of Visualforce maps, and helps users enter new addresses with autocomplete.


Limits for Map Views

Each paid and provisioned user is allotted 4,000 maps views per year. The map view limit for an entire organization is the total allotted map views of its paid and provisioned users. That total number of map views for an organization is shared by both paid and unpaid users. A map view is defined as one of the following:

- Display of an individual standard address map.

 **Note:** Display of billing and shipping address on the same record is considered separate map views.

- Display of a single Visualforce map.
- Display of a map marker whose location is specified by an address on a Visualforce map.

 **Note:** Map markers with location defined by latitude and longitude don't incur a map view.

- Each autocomplete on standard address field lookup.

Supported Browsers, Languages, and Accessibility Standards

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

[Supported Browsers](#)

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

[Supported Languages](#)

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

[Accessibility Standards](#)

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

Supported Browsers

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

[Supported Browsers for Salesforce Classic](#)

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

[Supported Browsers for Lightning Experience](#)

See the supported browsers and limitations for Lightning Experience.

[Internet Explorer Settings](#)

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

[Firefox Settings](#)

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

[Recommendations and Requirements for All Browsers](#)

For the best experience and security, follow these guidelines.

SEE ALSO:

[Requirements for the Salesforce App](#)

[Analytics Requirements](#)

Supported Browsers for Salesforce Classic

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



Note: Using Salesforce Classic in a mobile browser isn't supported. Instead, we recommend using the Salesforce app when you're working on a mobile device. To see the mobile browsers that are supported for Salesforce, check out [Requirements for the Salesforce App](#) on page 147.

EDITIONS

Salesforce Classic available in: **All Editions**

	Microsoft® Internet Explorer®	Microsoft® Edge	Google Chrome™	Mozilla® Firefox®	Apple® Safari®
Salesforce Classic	IE 9+	Latest	Latest	Latest	11.x+
Salesforce Console	IE 9+	Latest	Latest	Latest	No
Special setup considerations?	Yes	No	No	Yes	No
Limitations?	Yes	Yes	No	No	Yes

 **Note:**

- The term “latest version” is defined by the browser vendors. Use the support for your browser(s) to understand what “latest version” means.
- Salesforce Classic support for Microsoft® Internet Explorer® versions 7 and 8 is discontinued as of Summer ‘15.

SEE ALSO:

[Requirements for the Salesforce App](#)

Supported Browsers for Lightning Experience

See the supported browsers and limitations for Lightning Experience.

 **Note:**

- Salesforce doesn’t support non-browser applications that embed WebView or similar controls to render content for Salesforce Classic, Lightning Experience, or Salesforce mobile web. Examples of approaches that embed this type of control include Salesforce Mobile SDK, Microsoft’s WebBrowser Control, Electron’s embedded Chromium browser, iOS’s UIWebView and WKWebView, and Android’s WebView.
- You can’t access Lightning Experience in a mobile browser. Instead, we recommend using the Salesforce app when you’re working on a mobile device. For a list of supported mobile browsers on Salesforce, see [Requirements for the Salesforce App](#) on page 147.

EDITIONS

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

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

- You can continue to use IE11 to access Lightning Experience until December 16, 2017.
- If you opt in to [Extended Support for IE11](#), you can continue to use IE11 to access Lightning Experience and Communities until December 31, 2020.
- IE11 has [significant performance issues](#) in Lightning Experience.
- It is strongly recommended that you do not use Internet Explorer 11 with Community Builder.
- This change doesn’t impact Salesforce Classic.

	Microsoft® Internet Explorer®	Microsoft® Edge	Google Chrome™	Mozilla® Firefox®	Apple® Safari®
Lightning Experience	IE 11 (EOL December 31, 2020)	Latest	Latest	Latest	11.x+
Lightning Console Apps	IE 11 (EOL December 31, 2020)	Latest	Latest	Latest	11.x+
Lightning Communities	IE 11 (EOL December 31, 2020)	Latest	Latest	Latest	11.x+
Special setup considerations?	No	No	No	No	No
Limitations?	Yes	Yes	No	Yes	Yes



Note: The term “latest version” is defined by the browser vendors. Use the support for your browser(s) to understand what “latest version” means.

SEE ALSO:

[Requirements for the Salesforce App](#)

Internet Explorer Settings

If you use Internet Explorer, we recommend using the latest version that Salesforce supports. Apply all Microsoft software updates. To maximize the performance of Internet Explorer, set the following in the Internet Options dialog box via your browser's settings.

General Tab

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

Security Tab

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


Privacy Tab

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

Advanced Tab

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

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

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

Firefox Settings

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

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

Advanced Settings


Configure advanced preferences to maximize performance.


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

Preference	Recommended Value	Default Value
<code>accessibility.tabfocus</code>	7	1

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

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

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

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


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

Refer to [MozillaZine Knowledge Base](#) and [Firefox Support Home Page](#) for more information on these and other preferences.

Recommendations and Requirements for All Browsers

For the best experience and security, follow these guidelines.

The following recommendations and requirements apply for all browsers, whether you’re using Salesforce Classic or Lightning Experience.

-  **Note:** Salesforce doesn’t support non-browser applications that embed WebView or similar controls to render content for Salesforce Classic, Lightning Experience, or Salesforce mobile web. Examples of approaches that embed this type of control include Salesforce Mobile SDK, Microsoft’s WebBrowser Control, Electron’s embedded Chromium browser, iOS’s UIWebView and WKWebView, and Android’s WebView.
- For all browsers, enable JavaScript, cookies, and TLS 1.2. If TLS 1.2 isn’t available, enable TLS 1.1. Browsers that don’t support TLS 1.1 or TLS 1.2 won’t be able to access Salesforce after we deactivate TLS 1.0. Deactivation has already occurred in sandbox orgs and concludes with production orgs on July 22, 2017.
- Some features use iframes to work in Lightning Experience, so you must have the appropriate browser security settings for iframes to load correctly. Follow your browser’s instructions to enable working with iframes and third-party cookies. For example: In Internet Explorer, set the **Launching programs and files in an IFRAME** security setting to **Enable** or **Prompt**. In Safari, we recommend changing your privacy settings for cookies to **Allow from websites I visit**. In Chrome, make sure that **Block third-party cookies and site data** isn’t selected in the Content settings.
- The minimum screen resolution required to support all Salesforce features is 1024 x 768. Lower screen resolutions don’t always properly display Salesforce features such as Report Builder and Page Layout Editor.
- For Mac OS users on Apple Safari or Chrome, make sure the system setting `Show scroll bars` is set to **Always**.
- Some third-party browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable the browser’s plug-ins and extensions and try again.

Other products and features may also be affected by third-party plug-ins and extensions.

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

- Internet Explorer is the only supported browser for:
 - Standard mail merge (Salesforce Classic)
 - Installing Salesforce Mobile Classic on a Windows Mobile device
 - Connect Offline
- For the best experience on machines with 8 GB of RAM in the Salesforce Console, use Chrome.

Considerations for Microsoft Edge

Salesforce supports the latest version of Microsoft Edge for both Salesforce Classic and Lightning Experience. However, the Developer Console doesn’t support Microsoft Edge.

EDITIONS

Salesforce Classic available in: **All Editions**

EDITIONS

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

Launching programs and files in an IFRAME security setting to **Enable** or **Prompt**. In Safari, we recommend changing your privacy settings for cookies to **Allow from websites I visit**. In Chrome, make sure that **Block third-party cookies and site data** isn’t selected in the Content settings.

[Considerations for Microsoft Internet Explorer](#)

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

[Considerations for Apple Safari](#)

If you use Safari, we recommend using the latest version that Salesforce supports. Apply all Apple software updates.

[Considerations for Mozilla Firefox](#)

Salesforce makes every effort to test and support the most recent version of Firefox. However, Lightning Experience currently doesn't support Private Browsing.

[Considerations for Google Chrome](#)


If you use Chrome, we recommend using the latest version that Salesforce supports.

Considerations for Microsoft Edge

Salesforce supports the latest version of Microsoft Edge for both Salesforce Classic and Lightning Experience. However, the Developer Console doesn't support Microsoft Edge.

Considerations for Microsoft Internet Explorer

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

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

- You can continue to use IE11 to access Lightning Experience until December 16, 2017.
- If you opt in to [Extended Support for IE11](#), you can continue to use IE11 to access Lightning Experience and Communities until December 31, 2020.
- IE11 has [significant performance issues](#) in Lightning Experience.
- It is strongly recommended that you do not use Internet Explorer 11 with Community Builder.
- This change doesn't impact Salesforce Classic.

Keep the following considerations in mind when using Salesforce with Microsoft Internet Explorer.

- Lightning Experience might exceed IE11 data storage limits, which can cause performance problems. When you exceed the limits, you receive a message similar to "Do you want to allow force.com to use additional storage on your computer?" Agreeing removes the data limit for Lightning Experience. Another option is to set a 30 MB storage limit by following these steps.
 1. In Settings, select **Internet Options**.
 2. On the General tab, under the Browser History section, click **Settings**.
 3. On the Cache and Databases tab, increase the **Notify me when a website cache or database exceeds** option to 30 MB.
 4. Click **OK**.
- Salesforce Classic and Lightning Experience are supported in Internet Explorer 11 on Windows 8 and 8.1 for touch-enabled laptops with standard keyboard and mouse inputs only. There is no support for mobile devices or tablets where touch is the primary means of interaction. Use Salesforce mobile web instead.
- If you're using Microsoft® Internet Explorer® versions 9–10, you're redirected to Salesforce Classic even if your preference is set to Lightning Experience.
- Compatibility Mode in Internet Explorer isn't supported.

- Changing the compatibility parsing mode of the browser, for example, by using the `X-UA-Compatibility` header, isn't supported.
- Internet Explorer 11 isn't supported for the Developer Console.
- Drag and drop of files into feed comments isn't supported in Internet Explorer. Drag and drop of files into feed posts is supported in Salesforce Classic, but not in Lightning Experience.

There are additional considerations for Internet Explorer with Salesforce Classic.

- If you use Internet Explorer, confirm that you have TLS 1.1 and TLS 1.2 enabled. For more information, see [Enabling TLS 1.1 and TLS 1.2 in Internet Explorer](#).
- The HTML solution editor in Internet Explorer 11 is not supported in Salesforce Knowledge.
- The Metro version of Internet Explorer 10 isn't supported.
- Internet Explorer 9 users don't have browser-based spell check.

Considerations for Apple Safari

If you use Safari, we recommend using the latest version that Salesforce supports. Apply all Apple software updates.

Salesforce currently doesn't support Analytics with Apple Safari. Use Internet Explorer 11, Edge, or the latest version of Chrome or Firefox.

Considerations for Mozilla Firefox

Salesforce makes every effort to test and support the most recent version of Firefox. However, Lightning Experience currently doesn't support Private Browsing.

Considerations for Google Chrome

If you use Chrome, we recommend using the latest version that Salesforce supports.

The Use Strict Site Isolation setting in Chrome can cause some Salesforce features not to work. Disable the setting to restore the features.

Supported Languages

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

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

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

In addition to the Salesforce language support, you can localize your org in two ways. Use the Translation Workbench to specify languages you want to translate, assign translators to languages, translate your text customizations, and override labels and translations from managed packages. You can translate everything from custom picklist values to custom fields so that your global users can use Salesforce in their language.

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

Fully Supported Languages

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

- Chinese (Simplified): `zh_CN`
- Chinese (Traditional): `zh_TW`

- Danish: `da`
- Dutch: `n1_NL`
- English: `en_US`
- Finnish: `fi`
- French: `fr`
- German: `de`
- Italian: `it`
- Japanese: `ja`
- Korean: `ko`
- Norwegian: `no`
- Portuguese (Brazil): `pt_BR`
- Russian: `ru`
- Spanish: `es`
- Spanish (Mexico): `es_MX`
- Swedish: `sv`
- Thai: `th`

**Note:**

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

End-User Languages

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

End-user languages include:

- Arabic: `ar`
- Bulgarian: `bg`
- Croatian: `hr`
- Czech: `cs`
- English (UK): `en_GB`
- Greek: `el`
- Hebrew: `iw`
- Hungarian: `hu`
- Indonesian: `in`
- Polish: `pl`
- Portuguese (European): `pt_PT`
- Romanian: `ro`

- Slovak: `sk`
- Slovenian: `sl`
- Turkish: `tr`
- Ukrainian: `uk`
- Vietnamese: `vi`

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

- Live Agent
- Cases
- Accounts

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

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


- Report Builder
- Generating quote PDFs
- Customizable forecasting
- Emails
- Salesforce Knowledge
- Feeds
- Communities
- Certain search features, including lemmatization and synonym groups

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

Platform-Only Languages

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

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

 **Note:** Language support is closely tied to the API version. For example, we introduced support for Belgian Dutch (`nl_BE`) in the same release as API version 40.0. To take advantage of this language, you must use API version 40.0 or later. In general, we recommend using the most recent version of the API to make the most of our language features.

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

- Dutch (Belgium) falls back to Dutch
- English (Australia), English (India), English (Malaysia), and English (Philippines) fall back to English (UK).
- French (Belgium), French (Canada), French (Luxembourg), and French (Switzerland) fall back to French.
- German (Austria), German (Belgium), German (Luxembourg), and German (Switzerland) fall back to German.
- Italian (Switzerland) falls back to Italian.
- Romanian (Moldova) falls back to Romanian.

- Montenegrin falls back to Serbian (Latin).
- Portuguese (European) falls back to Portuguese (Brazil).

The following platform-only languages are currently supported.

- Albanian: `sq`
- Arabic (Algeria): `ar_DZ`
- Arabic (Bahrain): `ar_BH`
- Arabic (Egypt): `ar_EG`
- Arabic (Iraq): `ar_IQ`
- Arabic (Jordan): `ar_JO`
- Arabic (Kuwait): `ar_KW`
- Arabic (Lebanon): `ar_LB`
- Arabic (Libya): `ar_LY`
- Arabic (Morocco): `ar_MA`
- Arabic (Oman): `ar_OM`
- Arabic (Qatar): `ar_QA`
- Arabic (Saudi Arabia): `ar_SA`
- Arabic (Sudan): `ar_SD`
- Arabic (Syria): `ar_SY`
- Arabic (Tunisia): `ar_TN`
- Arabic (United Arab Emirates): `ar_AE`
- Arabic (Yemen): `ar_YE`
- Armenian: `hy`
- Basque: `eu`
- Bosnian: `bs`
- Bengali: `bn`
- Catalan: `ca`
- Chinese (Simplified—Singapore): `zh_SG`
- Chinese (Traditional—Hong Kong): `zh_HK`
- Dutch (Belgium): `n1_BE`
- English (Australia): `en_AU`
- English (Canada): `en_CA`
- English (Hong Kong): `en_HK`
- English (India): `en_IN`
- English (Ireland): `en_IE`
- English (Malaysia): `en_MY`
- English (Philippines): `en_PH`
- English (Singapore): `en_SG`
- English (South Africa): `en_ZA`
- Estonian: `et`

- French (Belgium): `fr_BE`
- French (Canada): `fr_CA`
- French (Luxembourg): `fr_LU`
- French (Switzerland): `fr_CH`
- Georgian: `ka`
- German (Austria): `de_AT`
- German (Belgium): `de_BE`
- German (Luxembourg): `de_LU`
- German (Switzerland): `de_CH`
- Hindi: `hi`
- Icelandic: `is`
- Irish: `ga`
- Italian (Switzerland): `it_CH`
- Latvian: `lv`
- Lithuanian: `lt`
- Luxembourgish: `lb`
- Macedonian: `mk`
- Malay: `ms`
- Maltese: `mt`
- Romanian (Moldova): `ro_MD`
- Montenegrin: `sh_ME`
- Romansh: `rm`
- Serbian (Cyrillic): `sr`
- Serbian (Latin): `sh`
- Spanish (Argentina): `es_AR`
- Spanish (Bolivia): `es_BO`
- Spanish (Chile): `es_CL`
- Spanish (Colombia): `es_CO`
- Spanish (Costa Rica): `es_CR`
- Spanish (Dominican Republic): `es_DO`
- Spanish (Ecuador): `es_EC`
- Spanish (El Salvador): `es_SV`
- Spanish (Guatemala): `es_GT`
- Spanish (Honduras): `es_HN`
- Spanish (Nicaragua): `es_NI`
- Spanish (Panama): `es_PA`
- Spanish (Paraguay): `es_PY`
- Spanish (Peru): `es_PE`
- Spanish (Puerto Rico): `es_PR`
- Spanish (United States): `es_US`

- Spanish (Uruguay): es_UY
- Spanish (Venezuela): es_VE
- Tagalog: tl
- Tamil: ta
- Urdu: ur
- Welsh: cy

[Locale and Language Support for the Salesforce App](#)

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


SEE ALSO:

[Select Your Language, Locale, and Currency](#)

[Enable and Disable the Translation Workbench](#)

Locale and Language Support for the Salesforce App

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

-  **Note:** Salesforce for Android and Salesforce for iOS use the language and locale settings from both your Salesforce user profile and the locale settings on your mobile device. If your device uses different locale settings than are specified for your user profile, you see different languages displayed throughout the app. For example, the navigation menu displays in English while records display in French.


The Salesforce app includes multi-currency support, but advanced currency management isn't available.

The date fields in records, such as the `Close Date` field in opportunities, use the native date picker on your mobile device. For example, when your locale is set to Thai and you edit a date field, the year is displayed in Gregorian years, like 2017. When you save the date, the displayed year is translated to the Buddhist calendar equivalent, 2560. You can change the calendar setting on your mobile device by referring to the instructions for your mobile device. For example, in iOS 10, you can change the calendar setting by going to **Settings > General > Language & Region**.

Accessibility Standards

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

Salesforce is committed to providing on-demand enterprise applications accessible to all individuals, including users working with assistive devices, such as speech recognition software and screen readers.

-  **Important:** Accessibility features in Salesforce Classic are no longer maintained or enhanced. We recommend that you instead use Lightning Experience, which offers the latest accessibility features.

EDITIONS

The Salesforce app available in: **All** editions except Database.com

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Lightning Experience: Accessible by Design


Lightning Experience provides a fully accessible platform for our customers, based on the accessible markup in the [Salesforce Lightning Design System](#).

Lightning Experience has been developed to meet the Web Content Accessibility Guidelines Version 2.0 (WCAG), at level AA, and the WAI-ARIA specifications published by the W3C. Salesforce complies with Section 508 of the Rehabilitation Act and meets as many federal, state, and international accessibility requirements as possible.

A third-party vendor has completed an accessibility assessment of Salesforce's core products and has documented the assessment in our [Voluntary Product Accessibility Templates \(VPAT\)](#). Use the VPATs to evaluate the Salesforce design conformance with the accessibility standards under section 508 and W3C WCAG 2.0 Level AA.

Recommended Screen Readers and Browsers

Operating System	Screen Reader	Recommended Browsers
Windows [®] , latest version	NVDA, latest version	Google Chrome [®] , latest version
Windows, latest version	Freedom Scientific JAWS, latest version	Google Chrome, latest version
macOS, latest version	VoiceOver	Google Chrome, latest version, or Safari [®] , latest version

 **Note:** Salesforce pilot and beta features don't always provide full accessibility.

[Low-Vision Users Who Require Magnification](#)

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

[Deaf or Hearing Impaired Users](#)

Salesforce provides captions for videos accessible through the **Help & Training** link at the top of any page.

[Use Lightning Experience with a Screen Reader](#)

Learn how to get the most out of a screen reader and other assistive technologies when you use Lightning Experience, where accessibility features are built in.

[Use Salesforce Classic with Assistive Technologies](#)

Learn how Salesforce accessibility mode changes your experience with Salesforce Classic.

[Keyboard Shortcuts](#)

Use keyboard shortcuts to work efficiently in Salesforce. Shortcuts help you navigate and work with records faster and without using your mouse. You can use these shortcuts with your web browser shortcuts.

[Salesforce App Accessibility Considerations](#)

The Salesforce app provides users working with screen readers and other accessibility features a fully accessible mobile experience. Unlike the full Salesforce site, the Salesforce app doesn't require accessibility mode. If you use Salesforce with an assistive device, keep these tips in mind.

[Contact Salesforce](#)

Learn more about accessibility at Salesforce.

Low-Vision Users Who Require Magnification

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Deaf or Hearing Impaired Users

Salesforce provides captions for videos accessible through the **Help & Training** link at the top of any page.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Use Lightning Experience with a Screen Reader

Learn how to get the most out of a screen reader and other assistive technologies when you use Lightning Experience, where accessibility features are built in.

The examples focus on using Sales Cloud pages, but many tips are applicable to other products when you choose Lightning Experience.

See browser and screen reader recommendations in [Accessibility Standards](#).


EDITIONS

Available in: Lightning Experience

Available in: **All** Editions

General Screen Reader Tips

Salesforce is a complex web application that takes time to learn and understand. Screen readers can be complex applications themselves. We recommend that you become familiar with your screen reader's modes and navigation shortcuts on less complex websites before using it with Lightning Experience. Refer to your screen reader's documentation for guidelines and common usage tips.

 **Note:** While Salesforce does its best to comply with accessibility standards, sometimes glitches occur with certain combinations of screen readers and web browsers. If you encounter difficulties that aren't documented here, try using Salesforce with a different combination of screen reader and browser.

See [Known Accessibility Issues in Lightning Experience](#).

Screen Reader Modes

In this documentation, we sometimes reference putting your screen reader into a specific mode to interact with part of a page. It's useful to know your screen reader's modes and ways of switching between them before using Salesforce. Most screen readers for Windows have multiple modes.

When you use Salesforce and other web applications, the screen reader must switch modes between navigating pages and interacting with them. Sometimes a screen reader switches to the appropriate mode automatically if it correctly interprets elements on the page. Other times you must switch modes manually to get the behavior you want.

Navigation mode (JAWS Virtual mode and NVDA Browse mode)

This mode is the default mode for most screen readers. In this mode, use your screen reader's cursor keys to navigate element by element through the page, and use screen reader shortcuts to jump between elements of a particular type. The keys you press are sent to the screen reader rather than the underlying page. For instance, in NVDA's Browse mode, pressing the h key navigates to the next heading.

Interaction mode (JAWS Forms mode and NVDA Focus mode)

This mode is for interacting with controls on the page, such as form fields, tabs, list boxes, trees, and combo boxes. In this mode, the keys you press are sent to the underlying page rather than the screen reader. For instance, pressing the h key while on a text input in NVDA's Focus mode types "h" in the text input. Pressing the Escape key returns you to navigation mode.

Listen for a click sound in NVDA and JAWS to inform you of mode changes.

Check your screen reader's documentation to learn more about its modes.

General Lightning Experience Navigation Tips

Keep these navigation tips in mind as you use Lightning Experience.

- With NVDA, you sometimes need to enable **Focus Mode** when you navigate to a menu or a picklist inside a form.
- After you open a dialog, interact with it, and close it, the focus is placed on the button that launched the dialog.
- Don't use the screen reader's list of links. Because Salesforce is a complex application, it's possible to lose contextual information around a link.
- When you type in edit fields or combo boxes that perform as type-ahead or autocomplete fields, your screen reader reads the lists. To navigate to an item, use the arrow keys.
- We recommend using a screen reader that supports live regions, because status updates are often provided using this method.

General Keyboard Accessibility Tips

Some examples of keyboard navigation techniques include:

- Tab key moves to links and controls.
- Spacebar switches the state of buttons.
- Spacebar opens menus.
- Arrow keys move between menu items.
- Arrow keys move between tabs in a tab set.

Lightning Experience Keyboard Shortcuts

Lightning Experience has its own set of custom keyboard shortcuts. To open a dialog that lists available keyboard shortcuts, press Ctrl+/ on Windows or Cmd+/ on macOS.

The dialog includes shortcuts for common global actions and navigation. The Lightning Console UI provides an even richer collection of keyboard shortcuts. Make sure that you are using these keyboard shortcuts in your screen reader's interaction mode or in combination with your screen reader's passthrough key to avoid conflicts with your screen reader's default shortcuts.

For more information, see [Keyboard Shortcuts for Lightning Experience](#).

[Navigate Lightning Experience Page Layouts](#)

Learn about the layout of pages in Lightning Experience with details for screen readers.

[Lightning Experience Tips for Screen Readers](#)

Learn tips for using a screen reader with some parts of the Lightning Experience UI.

[Known Accessibility Issues in Lightning Experience](#)

Learn about known issues for screen readers and Lightning Experience.

Navigate Lightning Experience Page Layouts

Learn about the layout of pages in Lightning Experience with details for screen readers.

The examples focus on using Sales Cloud pages, but many tips are applicable to other products when you choose Lightning Experience.

We recommend that you partner with someone familiar with the page layouts used for your Salesforce org. Administrators can customize the display of tabs and UI options for your org.

We encourage administrators to improve the usability of pages for specific groups of users by removing unnecessary page content. Consider creating more simplified layouts for screen reader users by omitting complex structural items, such as tab sets.

EDITIONS

Available in: Lightning Experience

Available in: **All** Editions

Page Header

The page header includes:

- Skip links
- Global search box
- Buttons for navigating to favorites and managing them
- Global Actions quick create menu
- Contextual help menu , which launches a panel
- Setup menu
- Notifications button, which launches a panel
- User profile button, which launches a panel

Skip Links

The top of each page has two links: Skip to Navigation and Skip to Main Content.

- Skip to Navigation moves the focus to the navigation section after the page header. The navigation section begins with an App Launcher button that launches the app picker. In most Salesforce apps, the App Launcher button is followed by links that provide access to the main Salesforce objects, such as Accounts and Opportunities. In Console apps, the App Launcher button is followed by a link to a Salesforce object, a menu to select another object type, and a set of open tabs.
- Skip to Main Content moves the focus to the content of the current page and bypasses common links at the top of each page. For example, if you open Chatter, you're placed at the top of your feed. This link skips both the page header and the navigation links.

Global Search

The top of each Salesforce page has an editable combo box labeled Search Salesforce. Use this box to search your entire Salesforce org for records, files, Chatter groups and posts, and users. When you begin typing, a list of auto-suggested searches and records displays. Use the arrow keys to navigate the list of search suggestions. Or continue typing your search term, and press Enter to do a full search. When you press Enter on a suggested record, you go directly to the item. When you press Enter on a suggested search in the list, you go to a Search Results screen. On the screen, the search results are grouped by the object type, such as User or Group.

The Search Results screen is divided into sections, each marked with a heading level 2.

- The first heading level 2 is “Searchable objects from navigation bar.” This section contains links to narrow your search.
- Subsequent heading level 2s list the types of records returned. A search for Universal Containers can produce headings for Accounts, Contacts, Leads, and Opportunities.

If no headings follow the “Searchable objects from navigation bar” heading, your search didn’t return any results. If the search did return results, you hear the number of results when the page loads.

Favorites

The page header has two buttons for managing favorite pages. Use the first button to add or remove the current page. The button label is Add Favorite if the page is not on your favorites list. The label changes to Remove Favorite when the page is added. This button is disabled on pages that don’t support favorites.

The next button, Favorites List, opens a dialog that you can use to jump to a favorite page in Salesforce. The dialog lists your favorites and includes an Edit Favorites button. If you have many favorites, the dialog starts with a favorites search combo box, which is in focus when you open the dialog. Type a search term, or use your arrow keys to navigate through your favorites list. Press Enter to navigate to the highlighted favorite. Use the Edit Favorites button to open a new dialog where you can rearrange, rename, and remove pages in your favorites list.

See [Favorites Considerations](#).

Navigation Region

After the header region is the navigation section of the page. This section begins with the App Launcher button, which opens an App Launcher dialog that contains apps configured by your administrator. Use this dialog to switch between apps. You can also use the App Launcher to access a Salesforce object in your org.

Standard App Navigation

After the App Launcher is the main navigation for the current Salesforce app. The list contains links to object home pages, such as Accounts, Opportunities, and Leads. Some objects have menus associated with them. Use these menus to access recently used records of this object type and to create a record of this object type.

Lightning Console App Navigation

In Console Apps, the App Launcher is followed by a link to an object home, or a Select link if no object is selected. The object menu is labeled Show Navigation Menu. You can use these controls to browse through records of certain object types.

After these controls are your open Workspace tabs. Use your arrow keys to navigate between tabs. Each tab contains an action menu button and a close button. When you are focused on a tab, use your Tab key to navigate to one of its buttons.

Page Content

After the navigation section is the main content of the page. There are two main types of pages, each with a similar layout: object home pages and record home pages.

Beyond these two common page types, there are several unique pages, including Home, Tasks, Notes, Reports, Dashboards, News, Forecasts, and Chatter. Chatter pages include the feed, user profiles, groups, and Files. We encourage you to explore these page types and develop your own navigation strategies.

Object Home

All object home pages in Lightning Experience have the same layout. At the beginning of the main content section is the List View picker. To select a list view, use the associated heading level 1 link. After the list view heading link, an object home page has several actions.

- Action bar, which can contain several buttons or links and an overflow menu of actions that you can take at the object level
- List view control menu, where you can create, share, delete, and edit list views for the object
- Display picker, where you can switch between a list view and a Kanban view
- Refresh button
- Edit button, to edit values inline
- Chart button
- Filter button, which opens a panel for filtering your list view results

After this set of controls is the list view, which is an inline editable grid. After you tab to the grid, press the Enter key to enter the grid. To navigate the grid, use the arrow keys or screen reader table navigation. Edit buttons indicate that editing is allowed. Use an edit button to change the values of fields. If you've made edits, press the Escape key to leave the grid, and then press the Tab key to access the Save and Cancel buttons.

Record Home

The main content area on a record home page begins with the object type, followed by the record name, which is the page's heading level 1. After the heading is the action bar for the page. These buttons and links, and possibly an overflow menu, contain actions that relate to this record. The actions can include edit, delete, change owner, and so on. Most of these actions open and place focus in a modal dialog.

After the action bar is the highlights section, which has top details about the record. After the highlights section, you find two lists of tabs (also called tab sets). Depending on the record's object type, these tabs reveal record details, Chatter for the record, related lists, record activities, or anything else configured by your administrator. Use these tabs to get information, activity, and collaboration related to the record.

Related Lists

Related lists contain information about records that are linked to the record that you're on. All related lists and similar cards on record pages begin with a heading level 2 and are identified with the ARIA article landmark.

You can perform actions on objects and records inside related list cards.

Lightning Experience Tips for Screen Readers

Learn tips for using a screen reader with some parts of the Lightning Experience UI.

Composer Windows

A composer window is a dialog that stays at the bottom of your browser window. A composer persists across Salesforce pages until you close the composer or the browser tab. Typically, you use a composer for creating records. For example, you use a composer window when you create an object from the Global Actions menu in the page header.

A composer window consists of:

- A heading level 2
- Minimize or Restore button for switching the visibility of the composer window
- Maximize button for changing the composer window to a modal view
- Close button for closing the composer window without completing the task
- Composer body content, which usually consists of form fields
- Other buttons, such as Save or Done

EDITIONS

Available in: Lightning Experience

Available in: **All Editions**

When a composer opens, the first field in the composer window has focus. Press the Tab key to move the focus through the fields inside the composer window. Press the Escape key to navigate to the composer's header. From the composer's header, use Shift+Tab to navigate out of the composer and back to the browser tab.

To quickly navigate between two open composer windows, press the Escape key from inside a composer window to focus its header. Then use your arrow keys to navigate to the other composer window's header. When you're focused on the header of the composer you want to work in, press Enter to move into the composer's content area.

For easier navigation with a screen reader, we recommend having only one or two composer windows open at a time. When too many composer windows are open to fit on the screen, an overflow menu button appears. To reach this overflow menu button, press **g**, then press **d**. You might need to also use your screen reader's passthrough keys to send the g and d key presses directly to the page.

See also [Keyboard Shortcuts for Lightning Experience Composer Windows](#).

Type-Aheads and Lookups

Forms in Salesforce use combo boxes for lookup fields.

For single-select lookup fields

When you select a value for the lookup, the combo box input field is replaced with an HTML link. The link represents the filled-in value and is wrapped in an application role so that the data is sent to the application. You can clear the value by navigating to the link with your Tab key and pressing the Delete key. Your focus then moves to the restored combo box input.

For multi-select lookup fields

When you select a value for the lookup, the value is added to a list of selected values immediately after the combo box. This list is wrapped in an application role. From the combo box, press the Tab key to move your focus into the list of selected values. Use the arrow keys to navigate the list, and use the Delete key to remove individual values. When you navigate away from a lookup with selected values, the combo box is hidden on the page. Navigate back to the selected values to reveal the combo box again so that you can add more values.

Modal Dialogs

Many buttons in the Salesforce user interface open modal dialogs in the current browser window. When a modal dialog opens, everything else on the page is obscured so that your attention stays on the modal dialog's content. Keyboard focus also stays in the modal dialog until you close it.

Close a modal dialog by using the Close button near the top of the modal or by pressing the Escape key. When you close a modal, the underlying page's interactivity is restored, and your focus returns to the button that you used to launch that modal dialog.

Tab Sets

When you encounter a tab set in Lightning Experience, use the arrow keys to navigate between the tabs. Use the Tab key to navigate to the first focusable element in the selected tab's panel.

Known issue: Lightning tab sets are wrapped in an application role. You can't navigate them using the NVDA virtual cursor.

Sales Path

Opportunity workspace and Lead workspace page layouts can include the Sales Path feature, which represents the stages required for working through a sales process. Sales Path consists of stages represented with tabs that you can navigate with your arrow keys. To indicate that you've completed a stage, select its stage tab and use the Mark Stage as Complete button.

Tables and List Views

Salesforce displays records in tables called list views. To navigate to a list view, use the screen reader's shortcut for moving to the next table. If a page contains more than one list view, navigate by headings rather than by using the next table shortcut to get better context.

Table column headers in list views include buttons to control the view. For example, the buttons can sort data alphabetically and adjust column width. Your screen reader might announce these buttons along with the heading text while navigating between columns in the table.

Navigation in List Views

Salesforce list views use a grid interaction pattern. To navigate, we recommend that you use the grid's keyboard controls rather than your screen reader's table layer. Make sure that your screen reader is in interaction mode before you use the grid interactions. When you enter the list view using your Tab key, your screen reader switches to interaction mode.

Similar to many screen readers, list view grids have two modes.

Navigation mode

Navigation mode is the default mode for list views to let you quickly navigate the list view's contents.

Navigation mode has the following keyboard functionality.

- Use arrow keys to navigate between cells.
- Press the Tab key to navigate out of the list view.
- Press the Enter key to switch to action mode. If your screen reader cursor is on a cell that contains a single interactive control, pressing Enter switches to action mode. It then performs that control's default action. If the current cell has more than one interactive control, pressing Enter switches to action mode. Your focus is then placed on the first interactive control in the cell.

Action mode

Many cells in a list view can have actionable content, such as links, action menus, and inline edit. Switching to action mode lets you interact with these controls.

Action mode has the following keyboard functionality.

- Use arrow keys or the Tab key to navigate between controls.
- With focus on a control, you can use any key that you normally use to activate the control. For example, use the Spacebar to select a checkbox or the Enter key to follow a link.
- Press the Escape key to switch back to navigation mode. There is a known issue with Windows screen readers when you press Escape on a list view. The screen reader switches out of interaction mode instead of switching the list view out of action mode. To continue navigating the list view, manually switch your screen reader back to its interaction mode.

See also [Known Accessibility Issues in Lightning Experience](#).

Known Accessibility Issues in Lightning Experience

Learn about known issues for screen readers and Lightning Experience.

- When using NVDA, before interacting with a menu or a form's dropdown list, enable **Focus Mode** on your screen reader. Forms in Lightning Experience use accessible menus instead of standard picklists.
- After closing a dialog, use the browser's search feature to return to a known point on the page. After you open, interact with, and close a dialog, focus is placed on the button that launched the dialog.
- With VoiceOver on macOS, when you navigate through a list of items in a combo box using arrow keys, the screen reader doesn't read out the highlighted items.

EDITIONS

Available in: **Lightning Experience**


Available in: **All Editions**

- Many elements that function as buttons identify themselves as links to screen readers.
- Some interactive components are wrapped in an application role, which can present usability challenges in NVDA and JAWS. These components are tabs, filled-in lookup fields, and interactive lists. If you have issues with these components, use your Tab key to navigate into them rather than your virtual cursor. To use these components as intended, switch to your screen reader's interaction mode if it doesn't switch automatically.
- Salesforce's tree grids have limited screen reader support. In particular, NVDA skips over tree grids with the virtual cursor. With VoiceOver, you can navigate to the tree grid using the virtual cursor, but you can't use the virtual cursor to navigate through the tree grid. We recommend using your Tab key to navigate through a tree grid.

Use Salesforce Classic with Assistive Technologies

Learn how Salesforce accessibility mode changes your experience with Salesforce Classic.

Salesforce Classic includes an alternate user interface mode for using assistive technologies. Most new features are designed with accessibility in mind and are accessible in standard mode. However, accessibility mode might better suit your needs, especially if you are using speech recognition or screen reading software to create reports and dashboards or interact with list views.

 **Note:** Accessibility features in Salesforce Classic are no longer maintained or enhanced. We recommend that you instead use Lightning Experience, which offers the latest accessibility features.

[Enable Accessibility Mode](#)

Enable accessibility mode in Salesforce Classic.

[Accessibility Mode Features](#)

Learn how accessibility mode changes your experience using Salesforce.

[Accessibility Tips for Salesforce Classic](#)

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

Enable Accessibility Mode

Enable accessibility mode in Salesforce Classic.

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

Accessibility Mode Features

Learn how accessibility mode changes your experience using Salesforce.

Accessibility Mode Features That Enhance Usability

- Access setup pages from a Setup link at the top of the page.
- Dropdown menus include a Go button that you select to navigate to the option you choose in the dropdown list.

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic

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


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

Disabled Chatter Features

- Edit Chatter posts and comments


Disabled Calendar Features

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

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

Disabled Report and Dashboard Features

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

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

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

Disabled List View Features

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

Other Disabled Features

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



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

Accessibility Tips for Salesforce Classic

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

Sighted Keyboard Users

Learn about Salesforce accessibility features designed for sighted keyboard users.

Specific Color Users

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

Sighted Keyboard Users

Learn about Salesforce accessibility features designed for sighted keyboard users.

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

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic

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

Specific Color Users

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

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

- Display image text alternatives to access information provided by important images.
- Override our CSS for these classes: `assistiveText`, `zen-assistiveText`. Then set your browser settings according to your preferences.

In addition,

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



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

Keyboard Shortcuts

Use keyboard shortcuts to work efficiently in Salesforce. Shortcuts help you navigate and work with records faster and without using your mouse. You can use these shortcuts with your web browser shortcuts.

Keyboard shortcuts aren't case-sensitive. For example, Shift+B is the same as Shift+b. If Ctrl, Alt, or Shift is part of the shortcut, the sequence of the keys doesn't matter. For example, Ctrl+Alt+A is the same as Alt+Ctrl+A.

To learn more about Salesforce accessibility for keyboard users, see [Sighted Keyboard Users](#).

[Keyboard Shortcuts for Salesforce Classic](#)

Work faster in Salesforce Classic apps with keyboard shortcuts. You can use shortcuts to open recent items and show or hide the sidebar.

[Keyboard Shortcuts for Lightning Experience](#)

Work faster in Lightning Experience apps with keyboard shortcuts. You can search for, edit, save, and close a record without touching a mouse.

EDITIONS

Available in: **Salesforce Classic**

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

EDITIONS

Available in: **Salesforce Classic and Lightning Experience**

[Keyboard Shortcuts for Lightning Experience Composer Windows](#)

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

SEE ALSO:

[Keyboard Shortcuts for Lightning Console Apps](#)

[Keyboard Shortcuts for Salesforce Classic Console Apps](#)

[Keyboard Shortcuts for Macros](#)

[Keyboard Shortcuts for Health Cloud Console](#)

[Keyboard Shortcuts for Analytics Dashboards and Lenses](#)

[Keyboard Shortcuts for Dashboards in Lightning Experience](#)

[Keyboard Shortcuts for Data Categories](#)

Keyboard Shortcuts for Salesforce Classic

Work faster in Salesforce Classic apps with keyboard shortcuts. You can use shortcuts to open recent items and show or hide the sidebar.

Command	Description	Shortcut
Open Recent Items record	<p>Opens a record listed in the Recent Items list. Press any number from 0 to 9.</p> <p>For example, press Alt+1 to open the first item in the list, Alt+2 to open the second item, and so on. To open the 10th item in the list, press Alt+0.</p> <p>If you're using Mozilla® Firefox®, press Shift+Alt+<i>number</i> to open the record.</p> <p>If you're using Microsoft® Internet Explorer®, press Alt+<i>number</i> to highlight a record. To open the selected record, press Enter.</p>	<p>Windows: Alt+<i>number</i></p> <p>macOS: Option+<i>number</i></p>
Show or hide sidebar	<p>Show or hide the collapsible sidebar.</p> <p>To use this shortcut, your org must enable the collapsible sidebar.</p>	<p>Windows: Alt+S</p> <p>macOS: Option+S</p>

EDITIONS

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

Keyboard Shortcuts for Lightning Experience

Work faster in Lightning Experience apps with keyboard shortcuts. You can search for, edit, save, and close a record without touching a mouse.

Note:

- You can't customize keyboard shortcuts in Lightning Experience.
- Keyboard shortcuts aren't case-sensitive. For example, Shift+B is the same as Shift+b. If Ctrl, Alt, or Shift is part of the shortcut, the sequence of the keys doesn't matter. For example, Ctrl+Alt+A is the same as Alt+Ctrl+A.
- For shortcuts that specify "then," release the first key, or key combo, before typing the next key. The comma isn't part of the shortcut.
- Keyboard shortcuts are supported on U.S. and U.K. keyboards. Shortcuts that include / (forward slash) and . (period) aren't supported on other language keyboards.
- Lightning Experience keyboard shortcuts don't work on Salesforce Classic apps viewed in Lightning Experience.

EDITIONS

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

These shortcuts work in all Lightning apps with standard navigation. Lightning apps with console navigation have additional shortcuts. You can't use these shortcuts in apps created in Salesforce Classic.

Command	Description	Shortcut
Global		
Close or deselect	Close or deselect a window. You can't close some windows and dialogs with this shortcut.	Esc
Edit	Edit a record. This shortcut doesn't work with Lightning Knowledge articles, reports, dashboards, feed items, approval requests, and email messages.	E
Insert quick text	Displays the quick text browser. Use the browser to find, preview, and insert quick text.	Windows: Ctrl+. macOS: Cmd+.
Open or close Macros	Opens or closes the Macros utility.	M
Open or close Notes	Opens or closes the Notes utility. To use this shortcut, first open the utility.	N
Post to feed	Submits a post or comment. You can submit posts, comments, and questions with details. This shortcut doesn't work on other publisher actions, such as emails and polls.	Windows: Ctrl+Enter macOS: Cmd+Enter
Save	Save a record. Your focus must be on a field.	Windows: Ctrl+S macOS: Cmd+S
Search	Places your cursor in the search box.	/

Command	Description	Shortcut
Show shortcut menu	Displays the available shortcuts in a modal window.	Windows: Ctrl+/ macOS: Cmd+/
Navigation		
Focus notifications	Focuses the notification panel. Press the shortcut again to focus the next notification.	C
Focus notifications (reverse order)	Focuses the notification panel. Press the shortcut again to focus the previous notification.	Shift+C
Go to composer window	Goes to the docked composer window.	G, then D
Go to publisher	Takes you to the publisher. If your publisher has multiple actions, you can use the Tab and arrow keys to navigate within the publisher.	G, then P
Go to utility bar	Goes to the utility bar.	G, then U
Switch walkthrough focus	When the walkthrough window is displayed over the app, this shortcut lets you switch focus between the walkthrough and the app.	F6

Keyboard Shortcuts for Lightning Experience Composer Windows

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

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

Description	Shortcut
Opens the overflow menu from anywhere on the page	g, then d
Moves through the list of open composer windows in the overflow menu	Up Arrow and Down Arrow
Moves between open composer windows	Left Arrow and Right Arrow
Moves focus to inside the composer window (from a composer window's header)	Enter
Cycles through the fields inside the composer window	Tab
Moves focus from a composer window to the window's header	Esc

EDITIONS

Available in Lightning Experience

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

Salesforce App Accessibility Considerations

The Salesforce app provides users working with screen readers and other accessibility features a fully accessible mobile experience. Unlike the full Salesforce site, the Salesforce app doesn't require accessibility mode. If you use Salesforce with an assistive device, keep these tips in mind.

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

If you're using assistive technology on an iOS device, consider these issues:

- When VoiceOver is enabled, three-finger scrolling isn't available on some pages. In this case, use the buttons on the top and bottom of the screen to scroll vertically and the buttons on the left and right of the screen to scroll horizontally.
- Using pinch and spread to zoom isn't currently supported. To zoom, use the iOS zoom function.

If you're using assistive technology on an Android device and post to Chatter, the area for writing your post isn't announced.

EDITIONS


The Salesforce app available in: **All** editions except **Database.com**

Contact Salesforce

Learn more about accessibility at Salesforce.

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

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

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Additional Resources

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

[Tip Sheets and Implementation Guides](#)

In addition to online help, Salesforce publishes additional material to help you be successful.

These documents include tip sheets, implementation guides, and other resources that describe the features and capabilities of Salesforce.

[Get More Done Faster with Walkthroughs](#)

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

[Handy Videos to Learn More About Salesforce](#)

Sometimes it's easier to understand how things work when you see them in action. We've put together a bunch of informative videos that you can use to learn more about Salesforce. And they're all organized by themes in playlists, some of which are already very popular. Be sure to check them out when you get a chance!

EDITIONS

Available in: All Editions

Tip Sheets and Implementation Guides

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

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


- [Printable Tip Sheets & User Guides — All Users](#)
- [Learn More About Setting Up Salesforce](#)
- [Resources for the Sales Professional](#)
- [Service Cloud Printed Resources](#)
- [Reports and Dashboards](#)
- [Collaboration Resources for Users](#)
- [Communities Resources](#)
- [Health Cloud Resources](#)
- [Printable Tip Sheets and User Guides — For Administrators](#)

Get More Done Faster with Walkthroughs

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

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

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

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

EDITIONS

Available in: All Editions

Handy Videos to Learn More About Salesforce

Sometimes it's easier to understand how things work when you see them in action. We've put together a bunch of informative videos that you can use to learn more about Salesforce. And they're all organized by themes in playlists, some of which are already very popular. Be sure to check them out when you get a chance!



Who Sees What Series—Lightning Experience

This is a must watch series if you want to understand how roles, profiles, and sharing rules work together to provide access to all the various objects and records in your Salesforce organization.

Short URL: <http://sforce.co/whoseeswhatlightning>

If you're not using Lightning Experience yet, see [Who Sees What Series—Salesforce Classic](#).

EDITIONS

Available in: All Editions



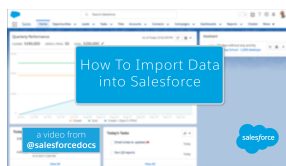
How Tos for Lightning Experience

Welcome to Lightning Experience, the new and improved Salesforce. Here's the complete collection of videos focused on the Lightning Experience interface. From planning your rollout to settings things up to getting productive with new sales and service features, we've got admins and end users covered.



How Tos for Salesforce Classic

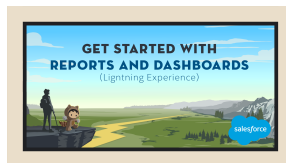
You've probably seen our videos in a help topic, or in a trail. Here is a collection of all of our How To videos for the Salesforce Classic user interface, for both administrators and end users.



How To Import Data into Salesforce

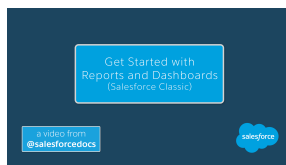
This 5-part video series walks you through all aspects of data import, from preparing your import files to matching owner and parent record IDs.

Short URL: <http://sforce.co/dataimport>



Get Started with Reports and Dashboards—Lightning Experience

Salesforce offers a powerful set of reporting tools in Lightning Experience. Watch these videos to learn how to build reports that answer your business questions, and dashboards that provide actionable insights to executives, managers, and associates alike.



Get Started with Reports and Dashboards—Salesforce Classic

This collection of videos from Salesforce will get you up and running with Salesforce Classic reports and dashboards in no time. Learn about the Salesforce Classic report builder, cross filters, joined reports, and matrix reports. Get tips on how to create and update dashboards. Even find out how to schedule reports to run automatically, or make them run faster!



How Tos for Einstein Analytics

Einstein Analytics is a powerful suite of business intelligence tools that surface insights and actions from your business data. Watch these videos to learn how to explore your data, build interactive dashboards, and create end-to-end analytics solutions with apps.



How Tos for Salesforce Health Cloud

This video series will get you up and running with the Salesforce Health cloud in no time. From managing your calendar on the Today page to managing entire patient care teams, the Health Cloud streamlines it all, so you can get back to what you do best.

Log In, Navigate, and Search Salesforce

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

[Log In for the First Time](#)

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

[Change Your Password](#)

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

[Change Your Security Question](#)

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

[Download Plug-Ins for Documentation and Online Training Courses](#)

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

[Navigate Salesforce Tabs](#)

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

[Search Across Salesforce](#)

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

[Set Up Your Chatter Profile](#)

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

[Explore the Salesforce Setup Menu](#)

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

[View and Purge the Recycle Bin](#)

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

[View and Display FAQ](#)

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

[Tips for New Users](#)

Some tips to help you become a fast, productive Salesforce user on day one.

Log In for the First Time

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

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

1. Check your email for your login information.
2. Click the link provided in the email.
The link logs you in to the site automatically.
3. The site prompts you to set a password and choose a security question and answer to verify your identity in case you forget your password.

EDITIONS


Available in: Salesforce
Classic and Lightning
Experience

Available in: **All Editions**

Change Your Password

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


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

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

1. From your personal settings, enter *Password* in the **Quick Find** box, then select **Change My Password**.
2. Enter the password information requested.
3. Click **Save**.

Change Your Security Question

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

 **Note:** If you don't see the Change My Password option, contact your Salesforce admin for assistance.

1. From your personal settings, enter *Password* in the **Quick Find** box, then select **Change My Password**.
2. Enter your current password.
3. From the Security Question drop-down menu, select a question.
4. Enter your answer to the question in the *Answer* field.
5. Click **Save**.

Download Plug-Ins for Documentation and Online Training Courses

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**

EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Available in: **All Editions**

EDITIONS

Available in: Salesforce Classic

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

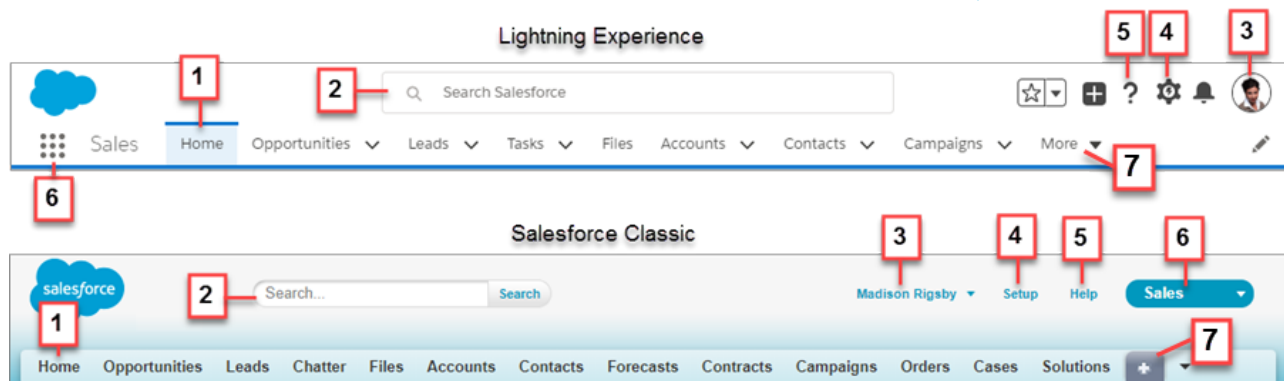
Navigate Salesforce Tabs

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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



- Click a tab to switch between objects and features (1)
- Search to find a record (2)
- Access user-specific customizations from your profile (3)
- If you have administrator privileges, use the Setup menu to customize Salesforce for your organization (4)
- Access help resources and training (5)
- View and access other apps within Salesforce (6). Each app contains different features and tabs.
- View more tabs that aren't visible on the nav bar (7).

[Explore the Home Tab](#)

When you log in to Salesforce, the first thing you see is most likely the Home tab.

[Explore Object Tabs](#)

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

[Explore Detail Pages](#)

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

[Access Other Salesforce Apps](#)

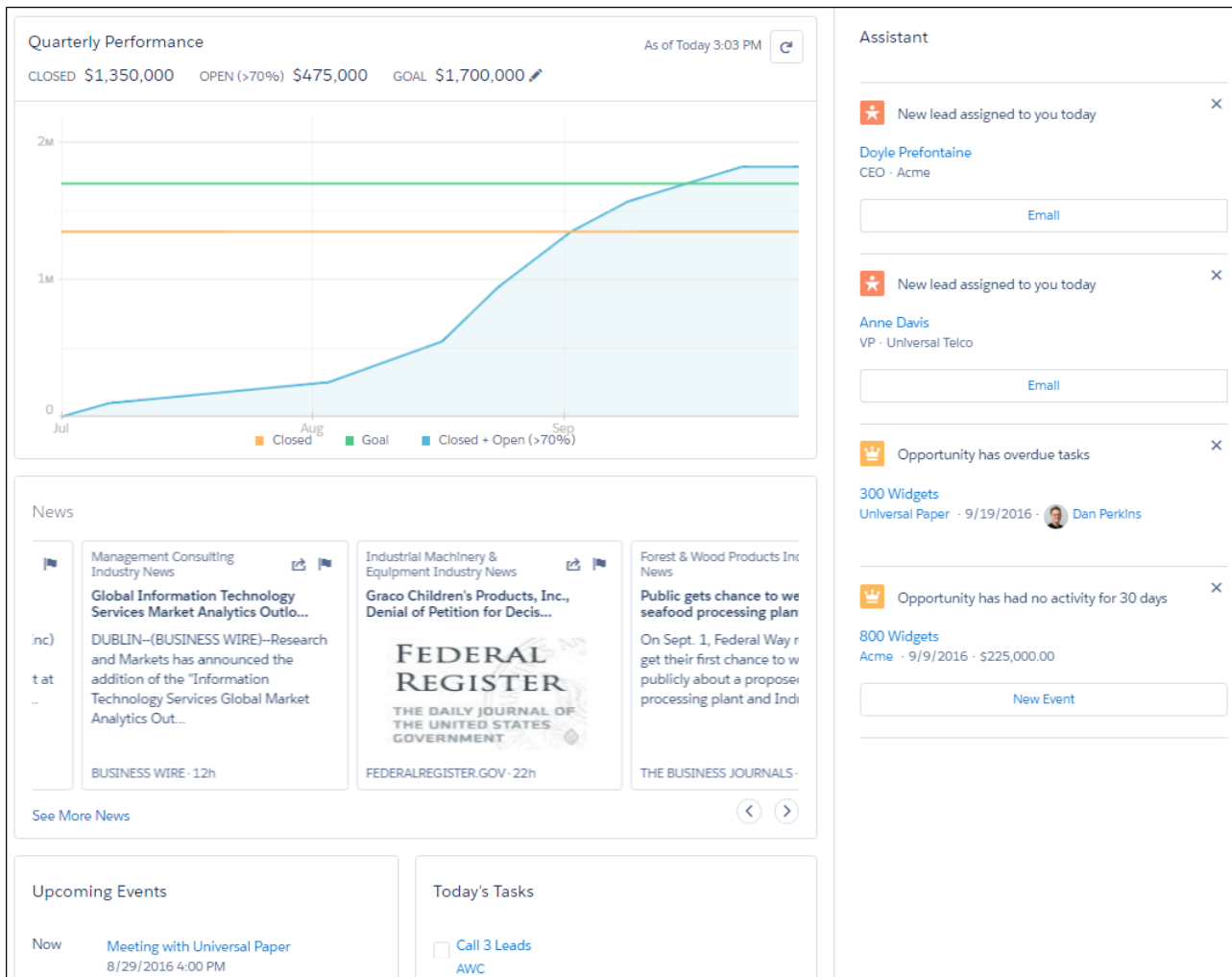
Looking for a particular feature? Check out the app menu or App Launcher to see all the Salesforce apps that are available to you.

Explore the Home Tab

When you log in to Salesforce, the first thing you see is most likely the Home tab.

The tabs and features you see depend on your user interface, edition, layout, and customizations.

Home in Lightning Experience focuses on top sales user priorities, including quarterly sales performance. There’s even an Assistant, which is your users’ action list of things to do. You can also use the Lightning App Builder to create custom Home pages for different profiles.



Home in Salesforce Classic gives you a high-level view of your work, including recently viewed items, your Chatter feed, and calendar of events.

Explore Object Tabs

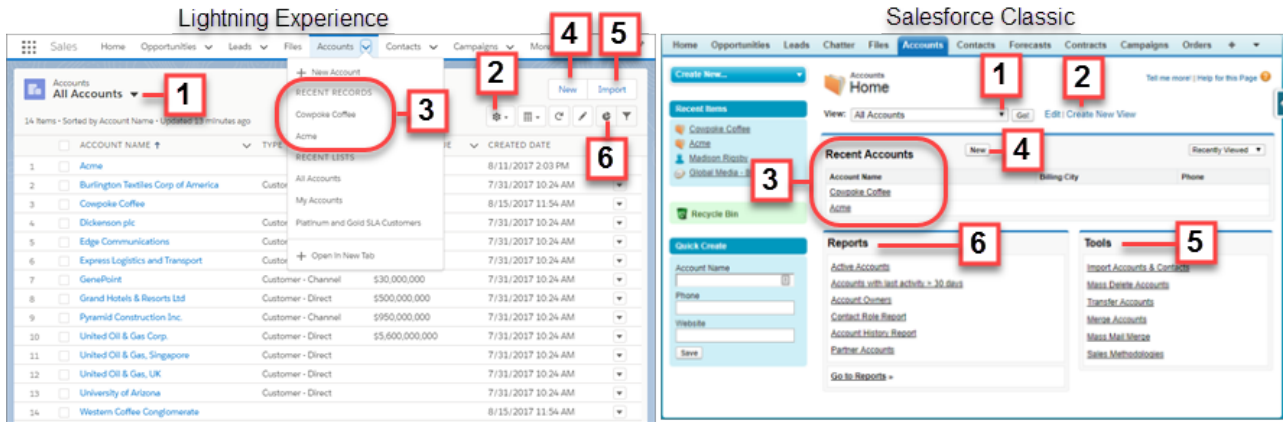
Object tabs show pages for your Salesforce objects, like a summary of your accounts.

Let’s walk through what you see on the Accounts tab. Select **Sales** from the App Launcher, and then click the **Accounts** tab.

The navigation model in Lightning Experience is optimized for efficiency with actions in the navigation bar. However, both Salesforce Classic and Lightning Experience provide similar functionality on object pages:

- A dropdown menu (1) for list views related to Accounts. You can also create list views and edit existing ones (2).
- Recent account records (3). You can also click **New** (4) to create an account record.
- Tools to import and manage records (5).

- Ways to visualize data with reports and charts (6).



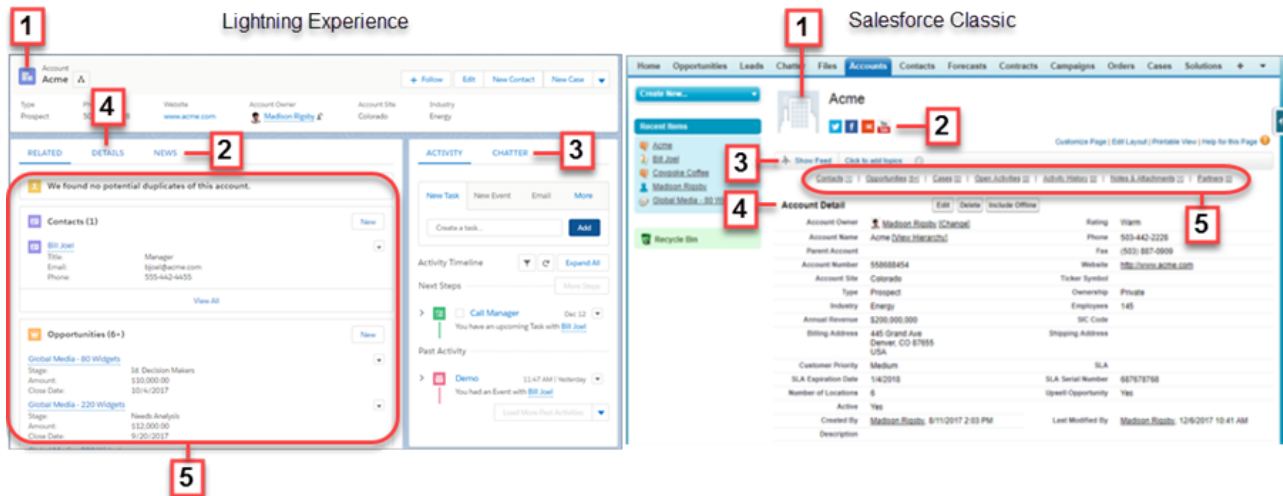
Explore Detail Pages

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

Let's navigate to the Accounts tab and click an account name.

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

- A profile image (1), if available, and social network links (2)
- A feed (3), where you can add and view comments about a record
- Detailed information about the account record (4) and related records (5)



Access Other Salesforce Apps

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

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

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

[Open Another App from the App Launcher in Salesforce Classic](#)


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

[Open a Another App in Lightning Experience](#)

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

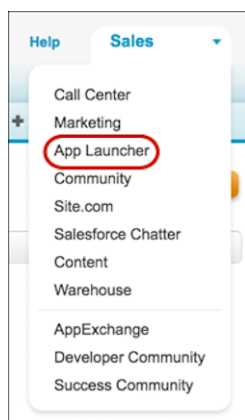
Open Another App from the App Launcher in Salesforce Classic

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

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

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

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



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

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

EDITIONS

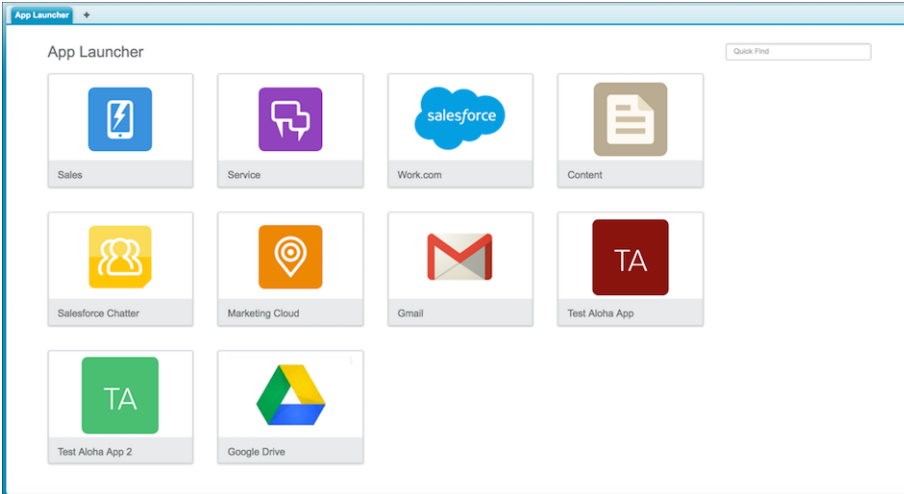
Available in: Salesforce Classic

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

USER PERMISSIONS

To see the App Launcher:

- Use Identity Features



Open a Another App in Lightning Experience

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

- ✔ **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.
- To open the App Launcher, on the left side of the navigation bar, click ☰ .

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

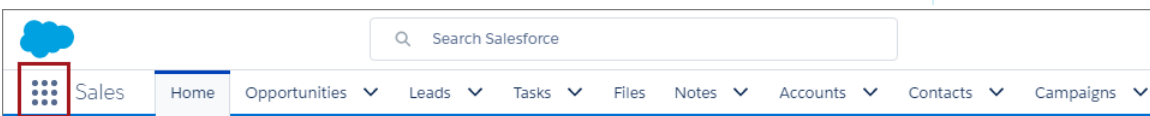
EDITIONS

Available in: Lightning Experience

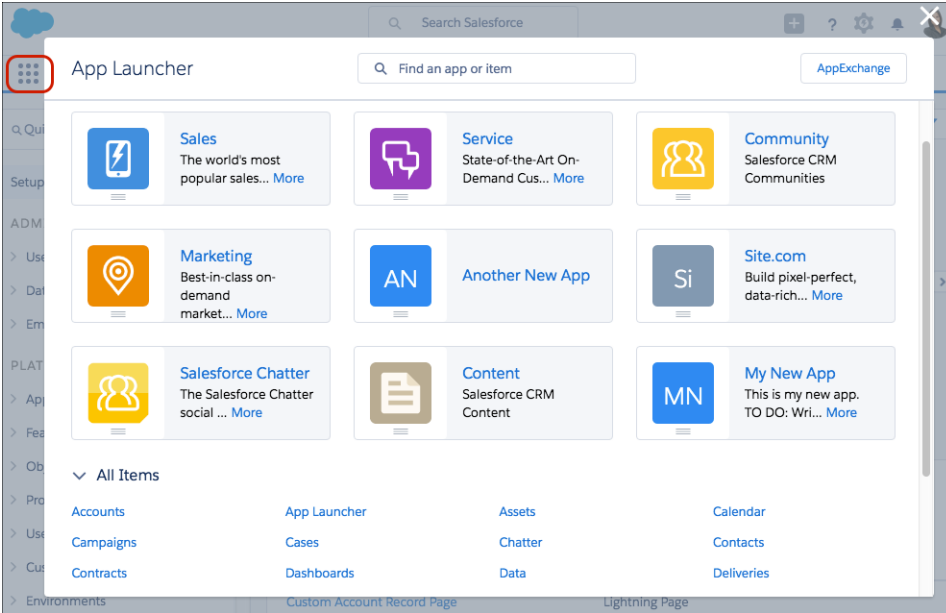
Available in: **All** editions except **Database.com**

USER PERMISSIONS

- To use an app:
- Access to that app as specified in your user profile or permission sets.

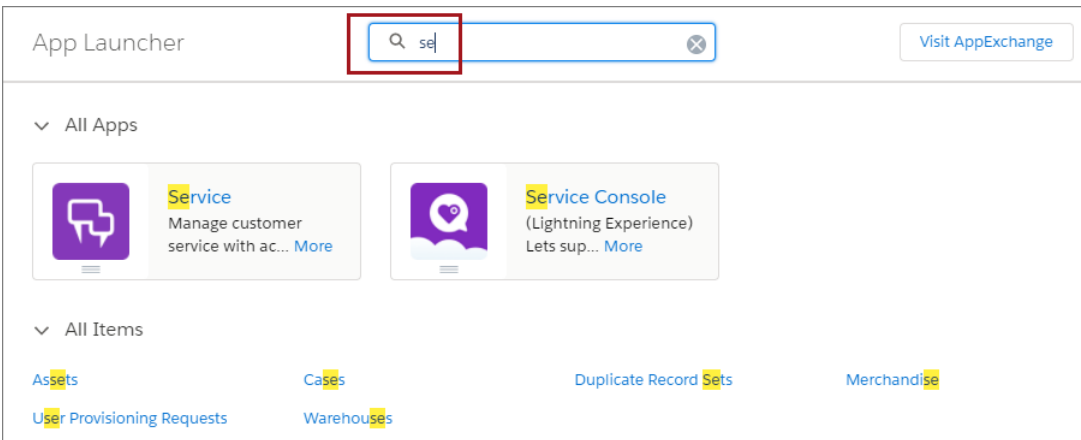


The App Launcher displays standard Salesforce apps, custom apps, and the connected apps that your Salesforce admin has installed for your convenience. Connected apps are third-party apps, such as Gmail, Google Drive, and Windows365.

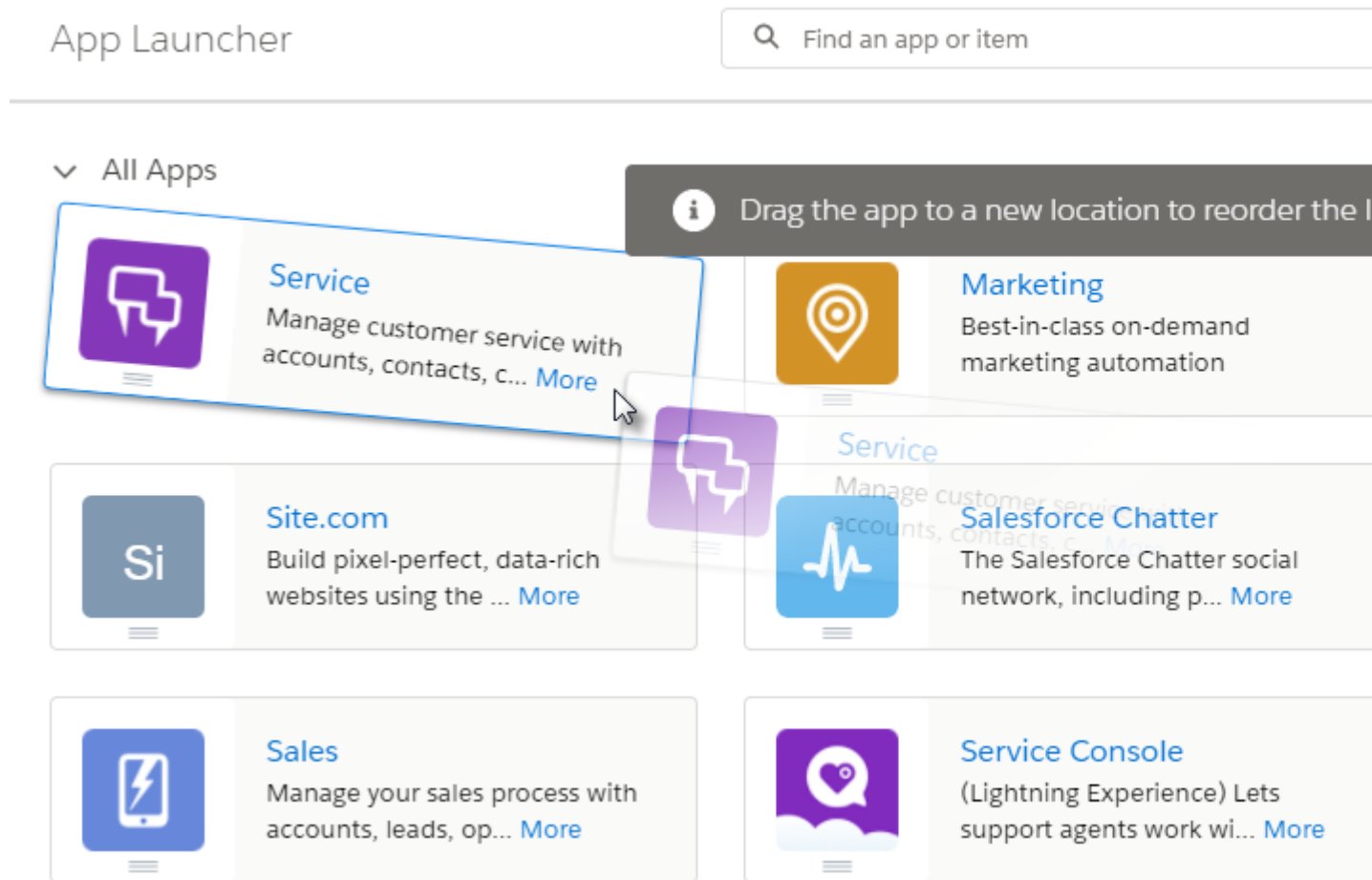


When you open a connected app, it opens in a new tab. Be sure to set your popup blocker to allow popups. Otherwise, your connected app doesn't launch.

- Use the Find an app or item box at the top of App Launcher to look for apps or items by name. For example, start typing the name of the app, such as "Service," and all apps and items containing the string appear as you type.



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



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

Search Across Salesforce

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

EDITIONS

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

[Search for Records in Lightning Experience](#)

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

[Search for Records in Salesforce Classic](#)

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

[Refine Search Results in Lightning Experience](#)

When you use global search, you search several fields for each object—and you can get a lot of search results. Use our guidelines for navigating the search results page to quickly find records.

[Refine Search Results in Salesforce Classic](#)

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

[Search Your Feeds in Lightning Experience](#)

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

[Search Your Feeds in Salesforce Classic](#)

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

SEE ALSO:

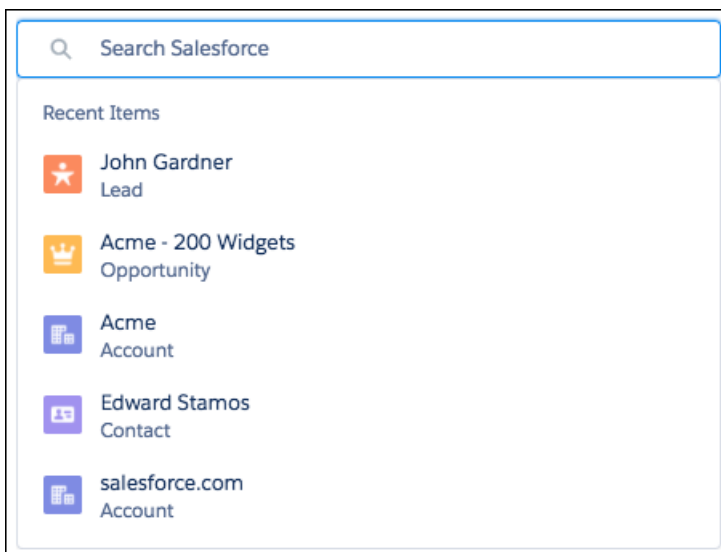
[Find Information with Search](#)

Search for Records in Lightning Experience

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

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

1. When you click in the search box, the instant results drop down presents a list of recent items. Use the suggestions for shortcuts to your frequently viewed records.



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

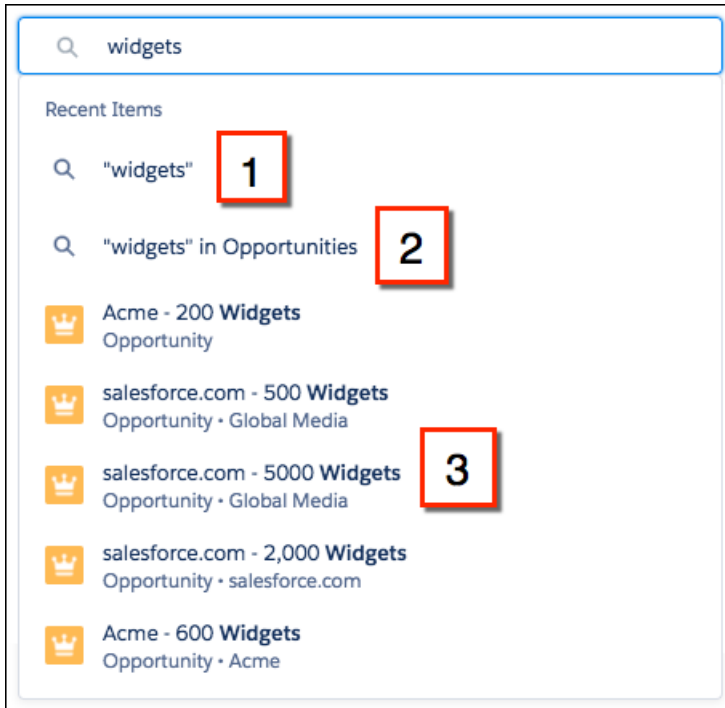
In the instant results drop down, you can also:

- Search across all searchable objects (1). You can also press Enter for the same results.
- Search within the object you're currently on (2).
- Select a suggested record and navigate directly to the record (3).

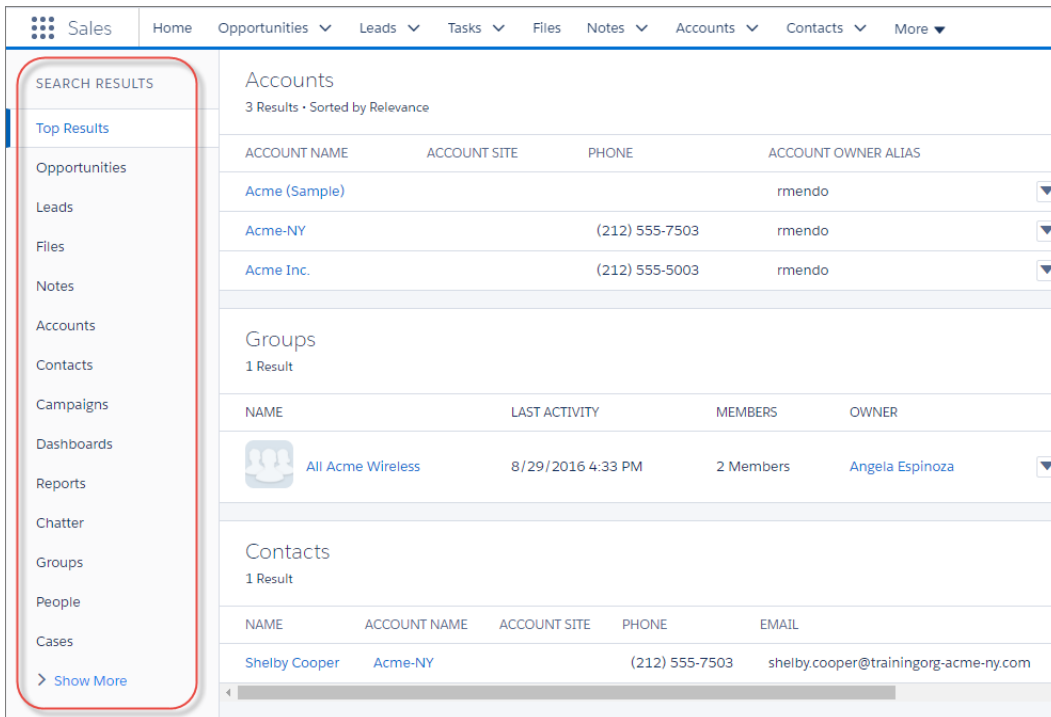
EDITIONS

Available in Lightning Experience

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

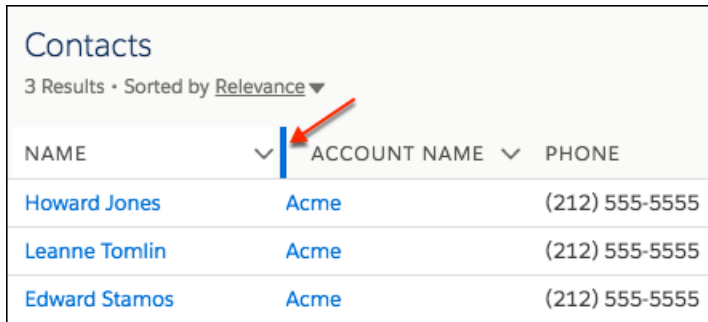


3. If you don't see the record that you want, press Enter to see the full search results. You'll land on the Top Results page, which shows you the most relevant results from your most frequently used objects.



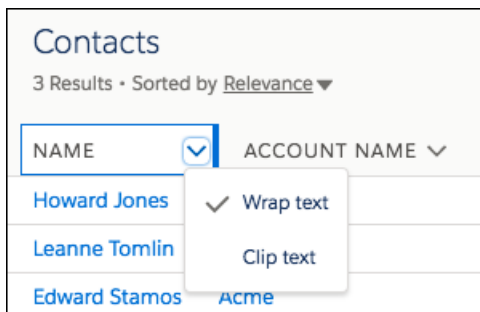
From this high-level overview, it's easy to find what you need. See results for a specific object by selecting it on the left under **Search Results**. Searchable objects are listed in the same order they appear in the global navigation bar. If you don't see the right object under **Search Results**,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

To adjust column widths on the search results page, click and drag the borders in the column header.



NAME	ACCOUNT NAME	PHONE
Howard Jones	Acme	(212) 555-5555
Leanne Tomlin	Acme	(212) 555-5555
Edward Stamos	Acme	(212) 555-5555

Text wrapping is on by default, but you can change this preference for a column by clicking the down arrow in the column header.



NAME	ACCOUNT NAME	PHONE
Howard Jones	Acme	(212) 555-5555
Leanne Tomlin	Acme	(212) 555-5555
Edward Stamos	Acme	(212) 555-5555

Note:

- Column width and text wrapping preferences aren't remembered for Tasks, Events, and Dashboards search results. They go back to their defaults in future searches.
- Column resizing and text wrapping aren't available for search results from external sources.

Still can't find a record? Here are easy things you can do to quickly get on the right search track.

- Enter a more specific search term if you get too many results. For example, enter the full name and company (*Mike Jones Salesforce*) or last name and zip code (*Jones 94123*). The more specific you are, the better your results are.
- If you are searching for a specific contact or opportunity, add the account name to your search term to see more targeted results. For example, *John Smith Acme* or *200 Widgets Acme*. This feature also works for record suggestions in Lightning Experience instant results.
- Avoid wildcards (*Mi* or *M?ke* for *Mike*) and partial terms (*Ac* for *Acme*).
- Limit your search to a specific object to get more results.
- Check your spelling and that you entered the complete search term.
- Wait a few minutes for the record to be made searchable if you recently created or updated the record. If you can't find your record after 15 minutes, contact your admin. Not all fields on a record are searchable.
- Check with your admin if you think the record isn't appearing due to permission issues. We only show you records that you have access to.

SEE ALSO:

[What Are the Results I See As I Type in the Search Bar?](#)

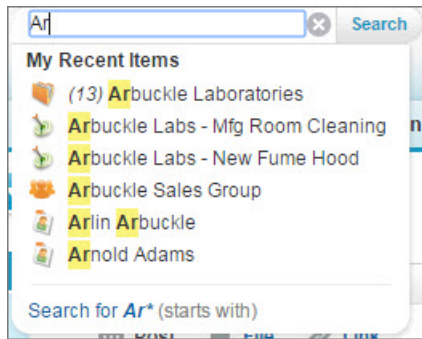
[Refine Search Results in Lightning Experience](#)

Search for Records in Salesforce Classic

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

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

1. Enter your search term.



EDITIONS

Available in Salesforce Classic

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

As you type, notice that the dropdown list includes **My Recent Items** and highlights the part of the record name that matches your search term.

2. Press Enter or click **Search**.
You're taken to the search results page.

Search Results Guided Tour | Help for this Page

1. Search bar:

2. Records (10+)

Action	Account Name	Region	Billing Country
Edit	Arbuckle Laboratories	EMEA	Greece
Edit	Arbuckle Laboratories	EMEA	Portugal
Edit	Arbuckle Laboratories	EMEA	Spain
Edit	Arbuckle Laboratories	EMEA	Spain
Edit	Arbuckle Laboratories	EMEA	Switzerland

3. [Show More](#) 5

4.

Campaigns (2)

Action	Campaign Name	Parent Campaign	Type	Status	Start Date	End Date	Total Responses	Owner Alias
Edit	Arbuckle Labs - Mfg Room Cleaning		Advertisement	Planned			0	AUser
Edit	Arbuckle Labs - New Fume Hood		Advertisement	Planned			0	AUser

Contacts (1)

Action	Name	Account Name	Mobile	Mailing City	Phone	Email	Contact Owner Alias
Edit	Mr. Arlin Arbuckle	Arbuckle Laboratories		Oslo			AUser

On the search results page, you can

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

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

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

Still can't find a record? Try these tips.

- Enter a more specific search term if you get too many results. For example, enter the full name and company (*Mike Jones Salesforce*) or last name and zip code (*Jones 94123*). The more specific you are, the better your results are.
- If you are searching for a specific contact or opportunity, add the account name to your search term to see more targeted results. For example, *John Smith Acme* or *200 Widgets Acme*. This feature also works for record suggestions in Lightning Experience instant results.
- Avoid wildcards (*Mi* or *M?ke* for *Mike*) and partial terms (*Ac* for *Acme*).
- Limit your search to a specific object to get more results.
- Check your spelling and that you entered the complete search term.
- Wait a few minutes for the record to be made searchable if you recently created or updated the record. If you can't find your record after 15 minutes, contact your admin. Not all fields on a record are searchable.
- Check with your admin if you think the record isn't appearing due to permission issues. We only show you records that you have access to.

SEE ALSO:

[How Does Search Work?](#)

[Instant Results in Salesforce Classic](#)

[Refine Search Results in Salesforce Classic](#)

Refine Search Results in Lightning Experience

When you use global search, you search several fields for each object—and you can get a lot of search results. Use our guidelines for navigating the search results page to quickly find records.

See the most relevant results on one page with Top Results

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

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

Quickly view results by object

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

EDITIONS

Available in: Lightning Experience

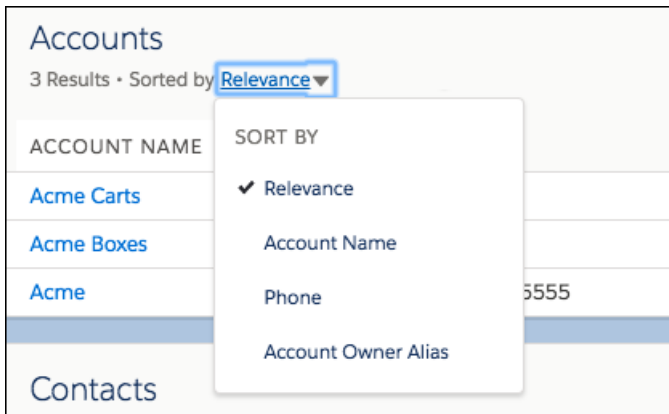
Available in: **All Editions except Database.com**

See all available objects under Show More

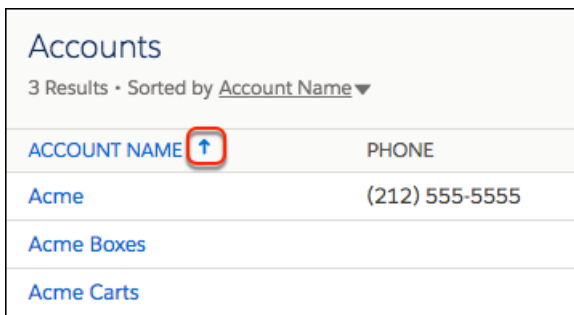
If you don't see an object listed under Search Results, select **Show More** to see all objects available to you. Searchable objects are listed in alphabetical order.

Sort your results

To sort search results, click column headers or use the sort drop-down menu.



To change the sort direction, click the arrow in the column header.



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

Filter Account and File Search Results

Click **Accounts** or **Files** under the Search Results heading to see filtering options.

The screenshot shows the Salesforce search interface. At the top, there is a search bar with the text 'acme'. Below the search bar is a navigation bar with various tabs: Sales, Home, Opportunities, People, Leads, Tasks, Campaigns, Files, and More. The main content area is titled 'Accounts' and shows 3 results, filtered by Owner Last Name and sorted by Relevance. The results are displayed in a table with columns: ACCOUNT NAME, OWNER LAST ..., OWNER FIRST..., INDUSTRY, and PHONE. The results are: Acme -- Palo Alto, Acme, Acme -- Brooklyn, Acme Carts, and Acme Boxes. On the left side, there is a 'SEARCH RESULTS' sidebar with 'Top Results' and 'REFINE BY' sections. The 'Top Results' section has 'Accounts' highlighted with a red box. The 'REFINE BY' section has input fields for 'Account Name', 'Owner Last Name' (with 'smith' entered), and 'Owner First Name'.

The search results update as you apply each filter. You can see which filters are applied above the search results. Your admin determines which fields can be filtered.

See results from outside of Salesforce

If your admin connected an external search engine to your org, results appear under External Results on the search results page. External sources are listed alphabetically. Frequently used external data sources also appear in Top Results. And, if the source was added to the navigation bar, it also appears under Search Results. Select the Title to go to the record detail page or **View** to go to the external document directly. Depending on the external source, the URL opens in the external source website or in a frame inside Salesforce.

More Search Tips and Best Practices

Here are easy things you can do to quickly get on the right search track.

- Enter a more specific search term if you get too many results. For example, enter the full name and company (*Mike Jones Salesforce*) or last name and zip code (*Jones 94123*). The more specific you are, the better your results are.
- If you are searching for a specific contact or opportunity, add the account name to your search term to see more targeted results. For example, *John Smith Acme* or *200 Widgets Acme*. This feature also works for record suggestions in Lightning Experience instant results.
- Avoid wildcards (*Mi* or *M?ke* for *Mike*) and partial terms (*Ac* for *Acme*).
- Limit your search to a specific object to get more results.
- Check your spelling and that you entered the complete search term.
- Wait a few minutes for the record to be made searchable if you recently created or updated the record. If you can't find your record after 15 minutes, contact your admin. Not all fields on a record are searchable.
- Check with your admin if you think the record isn't appearing due to permission issues. We only show you records that you have access to.

Refine Search Results in Salesforce Classic

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

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

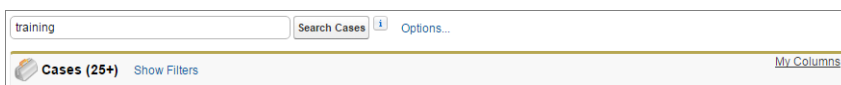
Search All

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

Pin

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

Filter



- Use **Options...** to restrict your search to items you own, if available, to exact phrase searches, and to divisions, if your organization uses them.
- Use **Show Filters**, if available, to filter your search results.
- Use **My Columns**, if available, to customize which columns display by customizing **Selected Fields** from the **Available Fields**.



Note: Your admin determines the availability of filter fields and customizable columns in a search layout. If your admin didn't create a search layout or if search layouts aren't available for an object, you can't filter search results or customize the columns in search results. Filters aren't available in Customer Portals or partner portals.

More Search Tips and Best Practices

Here are easy things you can do to quickly get on the right search track.

- Enter a more specific search term if you get too many results. For example, enter the full name and company (*Mike Jones Salesforce*) or last name and zip code (*Jones 94123*). The more specific you are, the better your results are.
- If you are searching for a specific contact or opportunity, add the account name to your search term to see more targeted results. For example, *John Smith Acme* or *200 Widgets Acme*. This feature also works for record suggestions in Lightning Experience instant results.
- Avoid wildcards (*Mi* or *M?ke* for *Mike*) and partial terms (*Ac* for *Acme*).
- Limit your search to a specific object to get more results.
- Check your spelling and that you entered the complete search term.
- Wait a few minutes for the record to be made searchable if you recently created or updated the record. If you can't find your record after 15 minutes, contact your admin. Not all fields on a record are searchable.
- Check with your admin if you think the record isn't appearing due to permission issues. We only show you records that you have access to.

EDITIONS

Available in: Salesforce Classic

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

Search Your Feeds in Lightning Experience

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

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

EDITIONS

Available in Lightning Experience

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


Search Your Feeds in Salesforce Classic

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

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

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

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

 **Example:** Watch a Demo:  [Search in Salesforce Classic](#)

EDITIONS

Available in Salesforce Classic

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


Set Up Your Chatter Profile


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


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

 **Note:** If your organization doesn't use Chatter, you can still [add and edit personal information](#).

1. Click the **Chatter** tab and find the placeholder profile image on the left side of the page. Click *Your Name* next to the placeholder image.
2. To update your profile photo, hover over the placeholder image and click **Add Photo**.

 **Tip:** Use a photo of you and not a group of people or a pet. Chatter is a business tool, so choose a photo you don't mind showing to your boss and CEO.

3. To update your contact information, click  under your profile photo. In the **Edit Profile** box, complete the fields on the Contact tab and the About tab.

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

4. Click **Save All**.

EDITIONS


Available in: Salesforce Classic


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

Explore the Salesforce Setup Menu

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

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

1. Look at the top of any Salesforce page.
 - If you're using Lightning Experience, click , then select **Setup Home**.
 - If you're using Salesforce Classic and you see **Setup** in the user interface header, click it.
 - If you're using Salesforce Classic and you don't see **Setup** in the header, click your name, then select **Setup**.
2. Enter the name of the Setup page, record, or object that you want in the `Quick Find` box, then select the appropriate page from the menu.

 **Tip:** Type the first few characters of a page's name in the `Quick Find` box. As you type, pages that match your search terms appear in the menu. For example, to find the Language Settings page, type `lang` in the `Quick Find` box, then select **Language Settings**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience


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

View and Purge the Recycle Bin

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

View Items in the Recycle Bin

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

-  **Note:** Records in the Recycle Bin don't count against your org's storage usage. However, Salesforce uses your storage limit to determine the maximum number of records allowed in your Recycle Bin. Your Recycle Bin can contain 25 times your MB storage capacity as records. For example, an org with a storage allocation of 2,000MB (2GB) can have 50,000 records in the Recycle Bin: $25 \times 2,000 = 50,000$ records.

Search for Items in the Recycle Bin

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view and recover your deleted records:

- Read on the records in the Recycle Bin

To view and recover records deleted by other users:


- Modify All Data

To recover deleted public tags:

- Tag Manager

To purge the Recycle Bin:

- Modify All Data

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


3. Click **Search**.

Restore Items in the Recycle Bin

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

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

- Parent accounts (as specified in the `Parent Account` field on an account)
- Indirect account-contact relationships (as specified on the Related Accounts related list on a contact or the Related Contacts related list on an account)
- Parent cases (as specified in the `Parent Case` field on a case)
- Master solutions for translated solutions (as specified in the `Master Solution` field on a solution)
- Managers of contacts (as specified in the `Reports To` field on a contact)
- Products related to assets (as specified in the `Product` field on an asset)
- Opportunities related to quotes (as specified in the `Opportunity` field on a quote)
- All custom lookup relationships
- Relationship group members on accounts and relationship groups, with some exceptions
- Tags
- An article's categories, publication state, and assignments

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

Purge the Recycle Bin

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

View and Display FAQ

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

[What’s the Collapsible Sidebar?](#)

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

[Why Can’t I See Some Features?](#)

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

[Why Can’t I View Salesforce Popup Windows Such as Lookup Dialogs and Help Pages?](#)

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

Why Can't I See Some Buttons and Links?

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

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

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

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

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

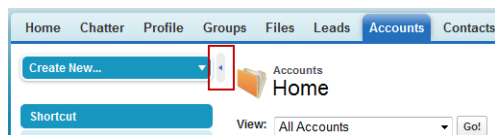
Why Am I Getting an Error Message?

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

What's the Collapsible Sidebar?

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

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



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

Why Can't I See Some Features?

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

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

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

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

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

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

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: All editions

To test your popup settings:

1. From your personal settings, enter *Reminders* in the **Quick Find** box, then select **Activity Reminders**. No results? Enter *Personal Information* in the **Quick Find** box, then select **Personal Information**.
2. Click **Open a Test Reminder**.

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

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

Why Can't I See Some Buttons and Links?

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

For example, users who do not have the "Delete" permission on opportunities do not see the **Delete** button on an opportunity detail page. They also don't see the **Del** link on an opportunity related list.

[Why can't I see the Sharing button on a record in Salesforce Classic?](#)

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.

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

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

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

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

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

Why Am I Getting an Error Message?

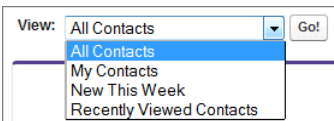
When you're working in Salesforce, you can occasionally get an error message. Typically, an error message appears when you try to view, edit, or delete information to which you don't have access.

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

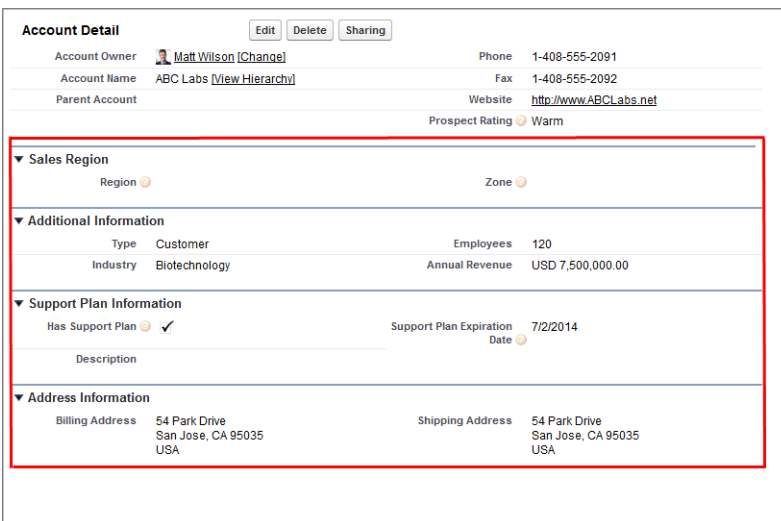
Tips for New Users

Some tips to help you become a fast, productive Salesforce user on day one.

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



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



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

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

EDITIONS

Available in: Salesforce Classic

Available in: All Editions

Verify Your Identity

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

[Methods for Verifying Your Identity](#)

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

[Salesforce Authenticator](#)

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

[Verify Your Identity with a One-Time Password Generator App or Device](#)

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

[Verify Your Identity with a Temporary Code](#)

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

[Troubleshoot Login Issues](#)

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

Methods for Verifying Your Identity

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

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

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

Salesforce Authenticator Mobile App

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

U2F Security Key

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

One-Time Password Generator App

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

SMS Text Message

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


EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Email

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

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

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

Salesforce Authenticator

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

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

[What Is Two-Factor Authentication?](#)

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

[Get the Salesforce Authenticator Mobile App \(Version 2 or Later\)](#)

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

[Requirements for Salesforce Authenticator \(Version 2 or Later\)](#)

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

[Salesforce Authenticator \(Version 2 or Later\) Accessibility Considerations](#)

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

[Locale and Language Support for Salesforce Authenticator \(Version 2 or Later\)](#)

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

[Connect an Account to Salesforce Authenticator \(Version 2 or Later\)](#)

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

EDITIONS

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

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

[Back Up Your Connected Accounts in the Salesforce Authenticator Mobile App](#)

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

[Restore Connected Accounts in the Salesforce Authenticator Mobile App](#)

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

[Remove an Account from Salesforce Authenticator \(Version 2 or Later\)](#)

When you no longer want to use the app for two-factor authentication, or want to switch to a new device, remove your Salesforce account from the Salesforce Authenticator mobile app.

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

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

[Block Unrecognized Account Activity with Salesforce Authenticator \(Version 2 or Later\)](#)

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

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

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

[Stop Location-Based Automated Verifications in Salesforce Authenticator \(Version 2 or Later\)](#)

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

What Is Two-Factor Authentication?

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

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

When someone tries to log in or access restricted online data in your account, Salesforce sends a notification to your mobile device. You open the Salesforce Authenticator app to see details of the online activity. After you check the details, you can tap **Approve** to verify that the activity belongs to you. If you don't recognize the activity, you tap **Deny** to block it. You can also flag the blocked activity for your Salesforce admin.

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

EDITIONS

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

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

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

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

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

New Installations

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

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

Updating from Salesforce Authenticator Version 1

If you already have version 1 installed on your mobile device, download the update from the App Store or Google Play. The update preserves the connected accounts you already have in the app. These accounts are code-only accounts that generate verification codes but don't receive push notifications or allow location-based automated verifications. Code-only accounts appear on your Connected Accounts list without a > at the far right of the account name row, and there's no account detail page. The verification codes in these code-only accounts are valid until you connect the new version 2 functionality to your Salesforce account via your personal settings. After you connect the new version, your account gives you full Salesforce Authenticator version 2 functionality: push notifications, location-based automated verifications, and verification codes.

EDITIONS

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

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

Requirements for Salesforce Authenticator (Version 2 or Later)

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

Supported Devices and Browsers

Salesforce Authenticator is supported in portrait orientation in these environments.

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

EDITIONS

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

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

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

Salesforce Editions and Licenses

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

Salesforce Editions

- Essentials Edition
 - Group Edition
 - Professional Edition
 - Enterprise Edition
 - Performance Edition
 - Unlimited Edition
 - Developer Edition
 - Contact Manager Edition
- Database.com Edition isn't supported.

User License Types

- Salesforce users
 - Salesforce Platform and Salesforce users
 - Customer Community, Customer Community Plus, and Partner Community external users
 - Portal users who are a member of a Salesforce community
- These user license types aren't supported:
portal users (unless a member of a Salesforce community), Database.com users, Sites and Site.com users, Data.com users, and Work.com users.

Wireless Connection

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

Salesforce Authenticator (Version 2 or Later) Accessibility Considerations

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

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

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

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

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

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

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

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

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

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

2. From your personal settings, enter *Advanced User Details* in the **Quick Find** box, then select **Advanced User Details**. No results? Enter *Personal Information* in the **Quick Find** box, then select **Personal Information**.

3. Find **App Registration: Salesforce Authenticator** and click **Connect**.

4. For security purposes, you're prompted to log in to your account.

5. Open the Salesforce Authenticator app on your mobile device.

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

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

The app generates a unique two-word phrase.

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

8. Click **Connect**.

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

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

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

Back Up Your Connected Accounts in the Salesforce Authenticator Mobile App

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

You can enable backups in the following ways:

EDITIONS

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

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

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

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

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

Operating System

Process

Android

If prompted to select which app to open the link with, tap **Salesforce Authenticator** from the list.

If your web browser opens, tap **Open Salesforce Authenticator**.

iOS

When asked for permission to open Salesforce Authenticator, tap **Open** to approve.

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

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

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

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

Restore Connected Accounts in the Salesforce Authenticator Mobile App

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

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

- Connected Accounts are active on only one device at a time. If you restore your Connected Accounts on a second device, you can no longer access them from the previous device.
- To restore your Connected Accounts on a new device, restore your accounts **before** creating new Connected Accounts on the new device. You can't restore Connected Accounts from a backup after creating new Connected Accounts.
- Custom connection names and custom usernames are not preserved; neither is the sort order of your connections. These settings return to their initial values. You can rename and resort your connections after you restore them.

1. From the Let's Get Started screen, tap **Restore from Backup**.
2. When prompted, enter your mobile number and tap **Send**.
3. Salesforce Authenticator sends you a text message with a link. Tap the link in the text message.
4. Authorize your mobile device to open the Salesforce Authenticator mobile app. This process is different on Android and iOS devices.

Operating System

Process

Android

If prompted to select which app to open the link with, tap **Salesforce Authenticator** from the list.

If your web browser opens, tap **Open Salesforce Authenticator**.

iOS

When asked for permission to open Salesforce Authenticator, tap **Open** to approve.


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

5. In the Salesforce Authenticator app, enter your passcode.
When you see your Connected Accounts, the restoration process is complete.

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

When you no longer want to use the app for two-factor authentication, or want to switch to a new device, remove your Salesforce account from the Salesforce Authenticator mobile app.

These steps are for Salesforce Authenticator users who want to disconnect Salesforce Authenticator on a device from their Salesforce account. For admins who want to disconnect a user's account (such as when a user loses the device running Salesforce Authenticator), see the admin instructions in *Disconnect Salesforce Authenticator (Version 2 or Later) from a User's Account*.

-  **Note:** Before you remove an account from the Salesforce Authenticator app on your mobile device, make sure that you don't lose access to your Salesforce account. Either ask your Salesforce admin to disable the two-factor authentication requirement from your account, or make sure that you have another two-factor authentication method available.

If you're disconnecting an account to switch to a new device, follow the steps to back up your connected accounts before proceeding.

1. Begin in a web browser, in your Salesforce account. From your personal settings, enter *Advanced User Details* in the **Quick Find** box, then select **Advanced User Details**. No results? Enter *Personal Information* in the **Quick Find** box, then select **Personal Information**.
2. Find **App Registration: Salesforce Authenticator**, and click **Disconnect**.
3. Open the Salesforce Authenticator app on your mobile device.
4. In the app list of connected accounts, find the account you want to remove.
5. Swipe left on the account username.
6. Tap **Remove** or **Delete**, whichever appears.
A confirmation dialog appears.
7. To confirm the removal of the account, tap **Remove**.

The next time you log in to Salesforce, you'll be prompted to set up two-factor authentication again, unless your system administrator has disabled it.

SEE ALSO:

- [Back Up Your Connected Accounts in the Salesforce Authenticator Mobile App](#)
- [Disconnect Salesforce Authenticator \(Version 2 or Later\) from a User's Account](#)

EDITIONS

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

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

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

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

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

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

EDITIONS

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

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

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

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

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

EDITIONS

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

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

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

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

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

1. Respond to a notification from Salesforce Authenticator by opening the app on your mobile device.
The app displays details of your account activity, including your username, the service you're trying to access (such as Salesforce), and information about the device used for the activity. If location services are enabled and available, the app shows your current location. Owing to the nature of geolocation technology, the accuracy of geolocation fields (for example, street address, country, city) can vary.
2. Check the details.
3. If you recognize the details, and you're in a location you trust, like your office or home, switch on **Always verify from here**.
4. Tap **Approve**.
In Salesforce, you're logged in or granted access to the desired resource. The next time you take the same action from the same location, the Salesforce Authenticator app automatically verifies the activity for you. You need your mobile device with you, but you don't have to respond to an app notification.

EDITIONS

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

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

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

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

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

EDITIONS

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

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

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

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

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


EDITIONS

Available in: Both Salesforce Classic and Lightning Experience

Available in: **All Editions**

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

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

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

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

4. For security purposes, you’re prompted to log in to your account.
5. Using the authenticator app on your mobile device, scan the QR code.
Alternatively, click **I Can’t Scan the QR Code** in your browser. The browser displays a security key. In the authenticator app, enter your username and the key displayed.
6. In Salesforce, enter the code generated by the authenticator app in the **Verification Code** field.
The authenticator app generates a new verification code periodically. Enter the current code.
7. Click **Connect**.

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

Verify Your Identity with a Temporary Code

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

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

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

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

Your admin sets how long the code is valid. You can use the code multiple times until it expires. You get an email notification whenever your admin generates a temporary code for you.
2. Enter the temporary code where prompted in the identity verification screen.
3. If you don't need the code any more and it's still valid, expire the code.
 - a. From your personal settings, enter *Advanced User Details* in the **Quick Find** box, then select **Advanced User Details**. No results? Enter *Personal Information* in the **Quick Find** box, then select **Personal Information**.
 - b. Find **Temporary Verification Code** and click **Expire Now**.

EDITIONS

Available in: Both Salesforce Classic and Lightning Experience


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

Troubleshoot Login Issues

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

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

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

-  **Note:** If you have the "User Single Sign-On" permission, only an administrator can reset your password. For help, contact your Salesforce administrator.
- Forgot your password? [Retrieve it](#).
- Locked out? Wait until the lockout period expires and try again, or contact your Salesforce admin.
- Password expired? We prompt you to change your password.
- Accessing Salesforce from outside a trusted IP range, using a new browser or app? We prompt you to [verify your identity](#).
- What does Use Custom Domain on the login page mean? If your Salesforce admin created a custom domain for your org, click **Use Custom Domain** to provide the domain name and log in.

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

[Reset Your Forgotten Password](#)

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

[Reset Your Security Token](#)

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

[Update Your Token in Salesforce Outlook Edition](#)

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

[Update Your Token in Connect Offline, Connect for Office, and Data Loader](#)

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

[Grant Login Access](#)

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

Reset Your Forgotten Password

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

▶ [Watch a Demo \(Salesforce Classic\)](#) (33 seconds)

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**

Reset Your Security Token

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

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

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

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

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



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

Update Your Token in Salesforce Outlook Edition

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

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

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**
Connect for Office not available in **Database.com**

Connect Offline available in: Salesforce Classic

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**
Connect for Office not available in: **Database.com**

Connect Offline available in: Salesforce Classic

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

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


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

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

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

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

- When you log in, add the security token value to the end of your password, such as `mypasswordXXXXXXXXXX`.

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

Grant Login Access

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


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

Watch a Demo:  [Letting Your Salesforce Administrator Access Your Account](#)

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

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

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**
Connect for Office not available in: **Database.com**

Connect Offline available in: Salesforce Classic

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**

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

USER PERMISSIONS

To view setup audit trail history:

- View Setup and Configuration

Personalize Your Salesforce Experience

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

[My Settings: Update Your Personal Settings](#)

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

[Update Your Profile Page](#)

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

[Personalize Your Navigation](#)

Personalize your Salesforce navigation so you can work more efficiently.

[Update Your Chatter and Communities Settings](#)

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

[Organize Your Day](#)

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

[Organize Your Data](#)

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

[Brand Your Org in Lightning Experience](#)

Rally your team around your brand and important initiatives, like a new product launch, with a set of custom brand images and colors in your org. We call them *themes*. You can choose one of Salesforce's built-in themes, or create your own custom themes with just a few clicks.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: All Editions.

My Settings: Update Your Personal Settings

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

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

[Access Your Personal Settings in Salesforce Classic](#)

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

[Access Your Personal Settings in Lightning Experience](#)

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

[Update Personal Information](#)

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

EDITIONS

Available in: Salesforce Classic

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

[Edit Your Email Settings](#)

You can change your outgoing email settings to specify the name that appears and add an optional signature. You can also specify a return address and opt to automatically send BCC emails to yourself at the return address.

[Edit Your Language and Locale Settings](#)

[Add, Remove, and Organize Your Tabs in Salesforce Classic](#)

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

[Customize Your Pages](#)

Specify the related lists that appear in detail pages.

[Set Record Type Preferences](#)

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

Access Your Personal Settings in Salesforce Classic

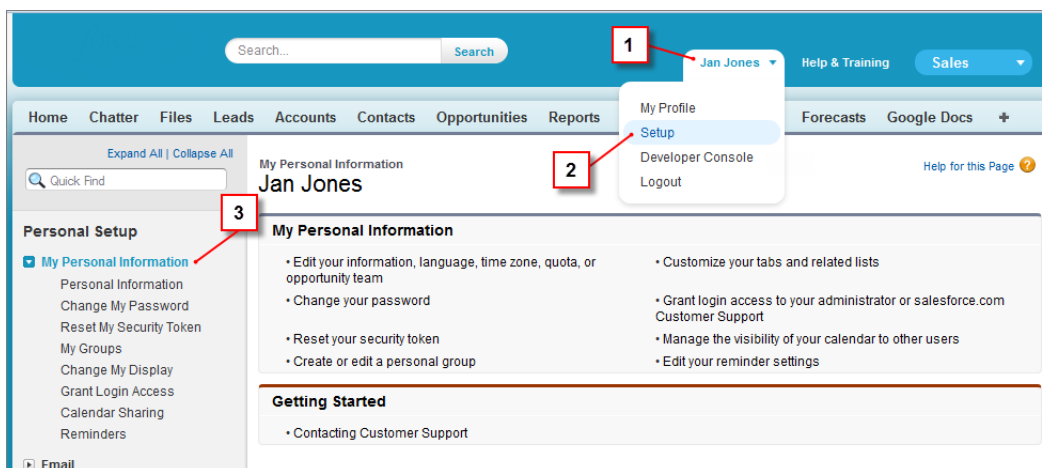
If you use Salesforce Classic, your personal settings are located either in Personal Setup or My Settings.

- At the top of any Salesforce page, click the down arrow next to your name.
Depending on your organization's user interface settings, you should see either **Setup** or **My Settings** in the menu.
- From the menu under your name, click **Setup** or **My Settings**.
- Do one of the following:
 - If you clicked **Setup**, look on the left side of the page and click a menu item to display its sub-menu, then click the item you want.

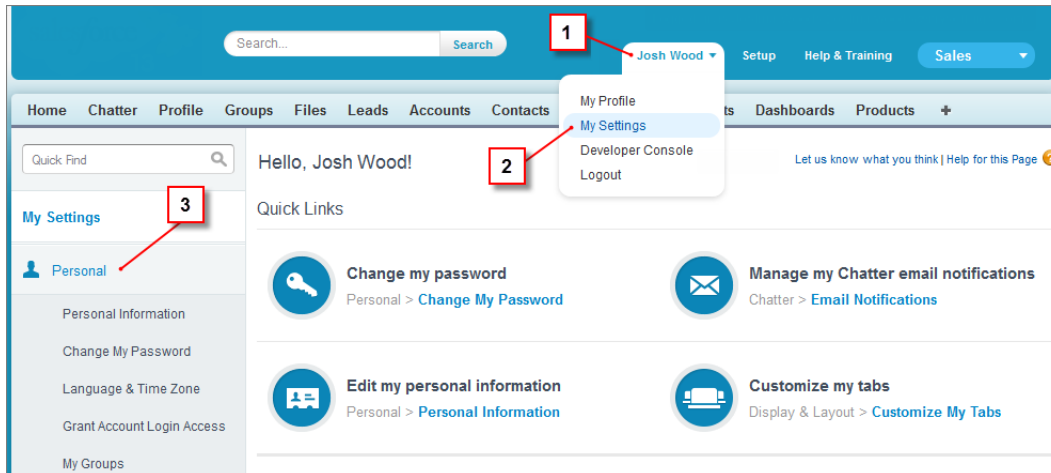
EDITIONS

Available in: Salesforce Classic

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



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



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

Access Your Personal Settings in Lightning Experience

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

1. At the top of any Salesforce page, click your image.
2. Click **Settings**.
3. On the left side of the page, click a menu item to display its submenu, then click the item you want.

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

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

EDITIONS

Available in: Lightning Experience

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

Update Personal Information

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

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

The available personal setup options vary according to which Salesforce Edition you have.


If you change your email address, a confirmation message is sent to the new address. Click the link in the message for the new email address to take effect. This process ensures system security.

4. Save your changes.

Edit Your Email Settings

You can change your outgoing email settings to specify the name that appears and add an optional signature. You can also specify a return address and opt to automatically send BCC emails to yourself at the return address.

1. From your personal settings, enter *My Email Settings* in the Quick Find box, then select **My Email Settings**.
2. Make your changes.

 **Note:** Depending on your org's settings, you can be prompted to confirm your identity if you change your email address. To confirm your identity, make sure that you have access to your previously registered email account.

In Personal and Developer Editions, a Salesforce-specific tag line is added below your personal signature on all outbound emails.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Edit Your Language and Locale Settings

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


EDITIONS

Available in: Salesforce Classic

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

Add, Remove, and Organize Your Tabs in Salesforce Classic

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

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

EDITIONS

Available in: Salesforce Classic

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

- To add or remove tabs and change their order, use the Add, Remove, Up, and Down arrows.
- Click **Save**.
- If you added a tab to an app you're not actively using, open that app to see your new tab.

Customize Your Pages

Specify the related lists that appear in detail pages.

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

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

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

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

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

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

- Save your changes.

Set Record Type Preferences

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

- From your personal settings, enter *Record Type* in the **Quick Find** box, then select **Set Default Record Types** or **Record Type Selection**—whichever one appears.

If the Record Type Selection option isn't available, your organization isn't using record types or multiple record types aren't available.

- Select the data type to specify that you want to use the default record type whenever you create that type of record. Otherwise, leave the box unchecked.

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

- Click **Save**.

Update Your Profile Page

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

Available in: Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic

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

You can update all fields on your profile, except the Manager field. Only your Salesforce admin can update the Manager field.

Personalize Your Navigation

Personalize your Salesforce navigation so you can work more efficiently.

[Personalize the Navigation Bar in Lightning Experience](#)

Personalize an app's navigation bar to suit the unique way you work. You can add items to the navigation bar, reorder items, and rename or remove items you've added.

[Personalized Navigation Considerations](#)

Keep these considerations in mind when personalizing an app's navigation bar in Lightning Experience.

[Create Shortcuts to Your Top Salesforce Pages with Favorites](#)

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

[Favorites Considerations](#)

Keep these considerations in mind when working with favorites.

[Customize Your Tabs in Salesforce Classic](#)

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience


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

Personalize the Navigation Bar in Lightning Experience

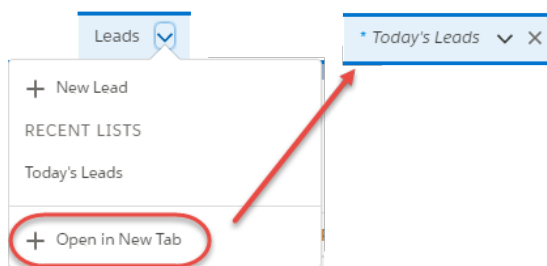
Personalize an app's navigation bar to suit the unique way you work. You can add items to the navigation bar, reorder items, and rename or remove items you've added.

1. Before you can add an item to an app's navigation bar, you first need to open it as a temporary tab. You can:

- a. Open an item in the App Launcher, from your favorites list, or click a link on a page or email. If the item you open isn't already accessible from the navigation bar, it opens as a temporary tab.

 **Note:** Temporary tabs open when you open an item that doesn't have a parent object already in the navigation bar. For example, if you open a contract record or contract list, it opens under Contracts if Contracts is available in the navigation bar. If Contracts isn't available, the record or list opens as a temporary tab.

- b. Open an item, like a lead or a list of Today's Leads, and select **Open in New Tab** from the dropdown menu.



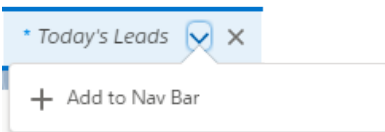
EDITIONS

Available in: Lightning Experience

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

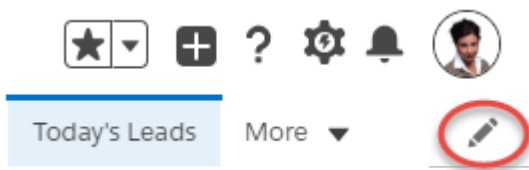
The asterisk next to the item name means it's a temporary tab. Temporary tabs are removed from the navigation bar when you close them, log out of Salesforce, or switch to a different app. But you can permanently add them to the navigation bar.

2. Select **Add to Nav Bar** from the temporary tab's dropdown menu.



The temporary tab is permanently added to the app's navigation bar.

3. Personalize the items in the app's navigation bar.
 - a. Click the pencil icon on the navigation bar.



- a. Reorder items, and rename or remove items you've added.

A navigation bar can contain up to 50 default and personal navigation items. For example, if an app has 40 default items in the navigation bar, you can add up to 10 personal items. You can't remove the default items that your admin defined for the app.

SEE ALSO:

[Personalized Navigation Considerations](#)

Personalized Navigation Considerations

Keep these considerations in mind when personalizing an app's navigation bar in Lightning Experience.

- You can reorder, rename, or remove items that you've added to a navigation bar, but you can't remove or rename the default items defined by admins.
- A navigation bar can have up to 50 items, which includes the default items. If a navigation bar already has 50 default items, you can't add more.
- If you open temporary tabs and then open a new web browser tab, the temporary tabs aren't available in the new browser tab.
- Admins can't access or modify the personal items users add to a navigation bar.
- Temporary tabs open when you open an item that doesn't have a parent object already in the navigation bar. For example, if you open a contract record or contract list, it opens under Contracts if Contracts is available in the navigation bar. If Contracts isn't available, the record or list opens as a temporary tab.
- Personalizations that you make in Lightning Experience aren't available in Salesforce Classic.

EDITIONS

Available in: Lightning Experience

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

Considerations for Admins

- Help users get the most out of personalized navigation by upgrading your Classic apps to Lightning apps. Users can't personalize the navigation bar of Classic apps in Lightning Experience.
- Check what's in your apps. Users can't remove the items you include in the navigation bar, and they can't personalize the navigation bar if it contains more than 50 items. For example, if you include 32 items in an app's navigation bar, users can add an additional 18 personal items.
- If you don't want your users to personalize the navigation bar for any app they use, you can disable personalization. From Setup, enter *User Interface* in the Quick Find box, then select **User Interface**. Select **Disable Navigation Bar Personalization in Lightning Experience**.



Tip: Avoid opening temporary tabs by adding appropriate parent objects to the navigation bar. For example, to prevent a contract list or record from opening as a temporary tab, add Contracts to the navigation bar.

SEE ALSO:

[Personalize the Navigation Bar in Lightning Experience](#)

Create Shortcuts to Your Top Salesforce Pages with Favorites

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

1. Click the star in the header of Lightning Experience to add the current page—for example, all open leads—to your favorites list.
A highlighted star means you're on a favorite. Remove a favorite by clicking the highlighted star.
2. Click the dropdown next to the star to find, open, and manage your favorites.
Each favorite shows the name and record type.

SEE ALSO:

[Personalize the Navigation Bar in Lightning Experience](#)

[Favorites Considerations](#)

Favorites Considerations

Keep these considerations in mind when working with favorites.

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

EDITIONS


Available in: Lightning Experience

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

EDITIONS

Available in: Lightning Experience

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

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

- You can't favorite things in setup pages, but you can still access your favorites from these areas.
- Only individual users can manage favorites. They can't be shared or edited by Salesforce admins.


SEE ALSO:

[Create Shortcuts to Your Top Salesforce Pages with Favorites](#)

Customize Your Tabs in Salesforce Classic

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

1. From your personal settings, enter *Customize My* in the **Quick Find** box, then select **Customize My Tabs**. No results? Enter *Display* in the **Quick Find** box, then select **Change My Display**.
2. If you have access to multiple apps, select the app whose tabs you want to customize from the **Custom Apps** drop-down list.
By default, you'll see the tabs for the selected custom app that are set for your profile.

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

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

EDITIONS

Available in: Salesforce Classic

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

Update Your Chatter and Communities Settings

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

[Change Your Profile or Group Photo](#)

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

[Follow People](#)

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

[Follow Records](#)

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

[Update Your Email Notifications in Chatter](#)

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

EDITIONS

Available in: Salesforce Classic

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

SEE ALSO:

[Join or Leave Groups](#)

Change Your Profile or Group Photo

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

Available in: Salesforce Classic and Lightning Experience

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

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

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

5. Save your changes.

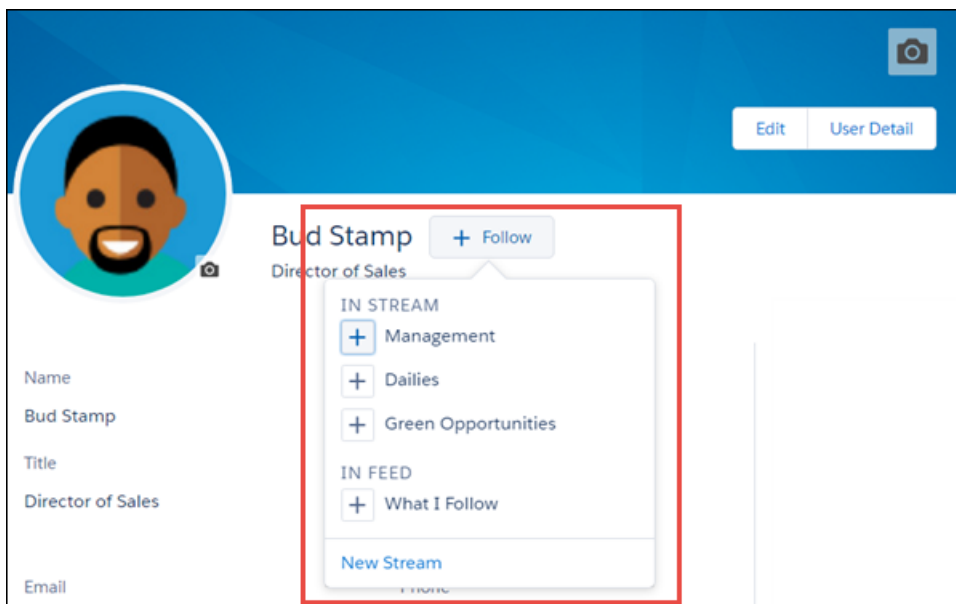
Follow People

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

Available in: Salesforce Classic and Lightning Experience

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

To follow a person, click **Follow** on a person's profile page. If the **Follow** button has a **+** in front of it, you have more options. Click the button to see options for following the person and for adding them to a new or existing stream. To follow the person from the menu, click **What I Follow**.



Note: You can find streams in Lightning Experience on the Chatter home page.

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

To stop following a person from your profile, mouse over the follower, then, in the hover, mouse over the **Following** label. In Salesforce Classic, click **x**. In Lightning Experience, select **Unfollow**. When you stop following a person, their past posts continue to appear in your What I Follow feed. But you don’t see any future updates from them.

Follow Records

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

Available in: Salesforce Classic and Lightning Experience

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

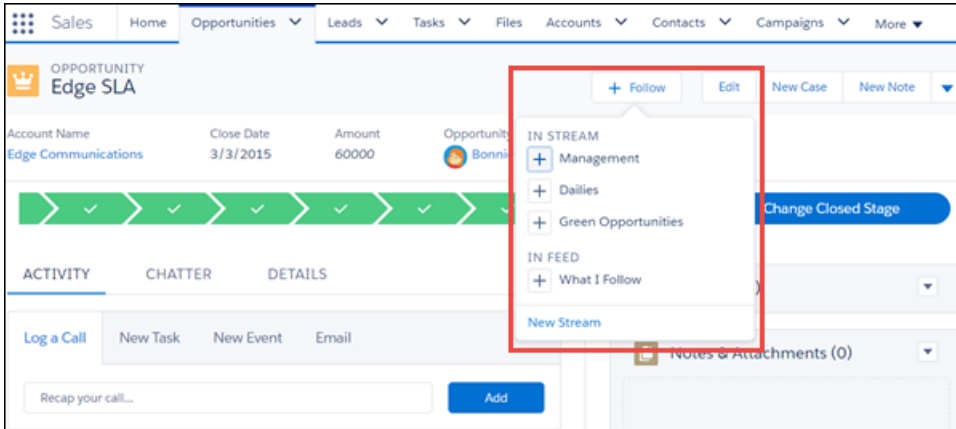
USER PERMISSIONS

To view a record:

- Read on the record

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

To follow a record, click **Follow** on the record page. If the **Follow** button has a **+** in front of it, you have more options. Click the button to see options for following the record and for adding it to a new or existing stream. To follow the record from the menu, click **What I Follow**.




Note: You can find streams in Lightning Experience on the Chatter home page.

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

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

When you create a child record, the owner of the parent record becomes the owner of the child record by default. But, despite your **Automatically follow** setting, you don’t automatically follow the child record. You must explicitly follow the child record, even when you’re the owner of the parent record.

To stop following a record on the record page, mouse over the **Following** label. In Salesforce Classic, click . In Lightning Experience, what you see depends on whether streams are enabled. If streams are enabled, click **Following** and deselect **What I Follow**. If streams aren't enabled, when you mouse over Following, you see **Unfollow**. Click **Unfollow**.

Update Your Email Notifications in Chatter

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

Available in: Salesforce Classic and Lightning Experience

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

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

Organize Your Day

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

[Schedule and Track Your Tasks and Events](#)

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

[Track Your Sales Performance](#)

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

[View Important Updates with the Assistant](#)

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

EDITIONS

Available in: Salesforce Classic

Available in: All Editions.

Schedule and Track Your Tasks and Events

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

In the My Tasks section, you can

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

 identifies tasks that are part of a recurring series.

EDITIONS



Available in: Salesforce Classic

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

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

In the Calendar section, you can:

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

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

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

SEE ALSO:


[Tasks](#)

[Events and Calendars](#)

Track Your Sales Performance

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

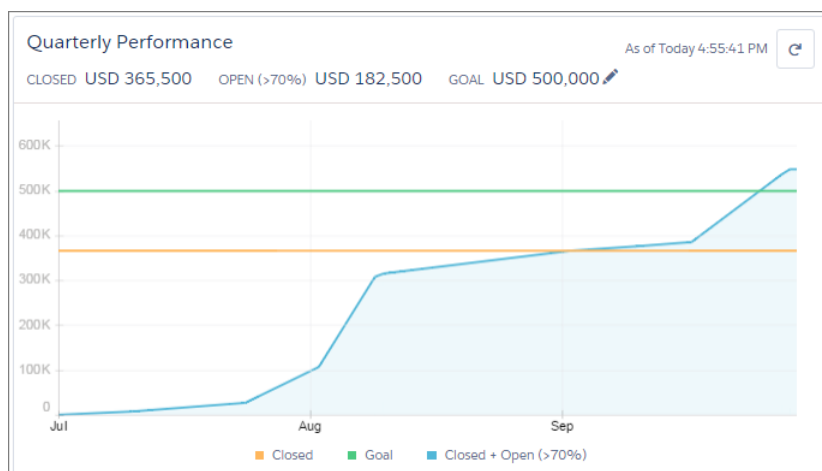
The performance chart displays data based on your sales team's opportunities if you have an associated team. Otherwise, the chart displays opportunities you own. Only opportunities for the current sales quarter that are closed or open with a probability over 70% are displayed.

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


EDITIONS


Available in: Lightning Experience

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



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

The performance chart isn't refreshed automatically. Click  to make sure you have the most up-to-date view of your sales performance.

 **Note:** The performance chart isn't compatible with custom fiscal years. If your org has custom fiscal years enabled, your admin can create custom reports and dashboards to display on the Home page.

SEE ALSO:

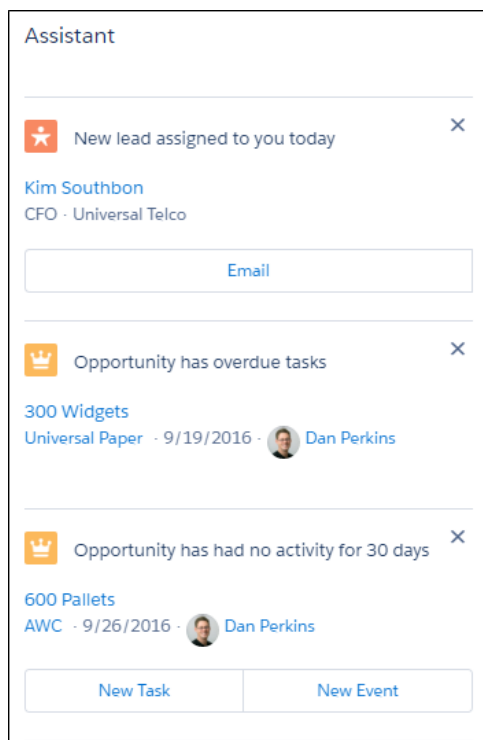
[Lightning Experience Home Permissions and Settings](#)

[View Important Updates with the Assistant](#)

View Important Updates with the Assistant

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

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



EDITIONS

Available in: Lightning Experience

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

The following updates appear in the Assistant:

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

Opportunities are overdue if they're still open after the Close Date. These updates stop appearing if it's been over 8 days since the Close Date.

Up to 10 updates are shown at a time. Updates about leads appear before updates about opportunities. Opportunity updates are arranged in order of close date.

 **Note:**

- If you have Einstein Activity Capture enabled, you won't see the updates about opportunities with no open activity or no activity in 30 days.
- The Assistant doesn't show tasks due today or overdue tasks that aren't tied to an opportunity. The Today's Tasks component is an alternative that's available on the Home page, and it shows a list of your tasks due today.
- If you don't have access to activities on opportunities or if the opportunity pipeline is off, you instead see recommendations for opportunities that have close dates over the next 90 days.

Buttons for different actions (such as **New Task**) automatically appear under most Salesforce configurations, but you may need to make some updates if you've customized global actions or publisher layouts.

Actions need to exist as global actions in order to appear in the Assistant. From Setup, enter *Global Actions* in the **Quick Find** box, then select **Global Actions**. Make sure the following actions are available. The Label can be anything, but we recommend something simple, like New Task, New Event, or Email.

Table 1: Required Settings for Global Actions

Allows user to	Action Type	Target Object	Name
Create a new task	Create a Record	Task	NewTask
Create a new event	Create a Record	Event	NewEvent
Send an email	Send Email	Outgoing Email	SendEmail (not required)

To display actions, they also need to be included in the related global publisher layouts. From Setup, enter *Publisher Layouts* in the **Quick Find** box, then select **Publisher Layouts**. Select the relevant publisher layout, and make sure the actions are included under the **Mobile & Lightning Actions** section.

SEE ALSO:

- [Lightning Experience Home Permissions and Settings](#)
- [Track Your Sales Performance](#)

Organize Your Data

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

[What's the Difference Between Standard and Custom Objects?](#)

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

[Find and View Your Data](#)

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

Update Your Data

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

Analyze Your Data

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

Note and Attachment Fields


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

What's the Difference Between Standard and Custom Objects?

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

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

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

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

SEE ALSO:

[Find and View Your Data](#)

[Create and Update Records](#)

Find and View Your Data

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

Find Your Records

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

Sort List Views

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

Print List Views

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view a custom object tab:

- Read on the custom object

To view custom object records:

- Read on the custom object

EDITIONS

Available in: Salesforce Classic

Available in: All Editions

Visualize List View Data with Charts in Lightning Experience

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

Customize Your Data View

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

Work with Related Lists on Records

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

Open Items You've Recently Viewed

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

Display a Visual Summary with Kanban

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

Change Your Working Division

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

Change the Dashboard on Your Home Tab

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

Find Your Records

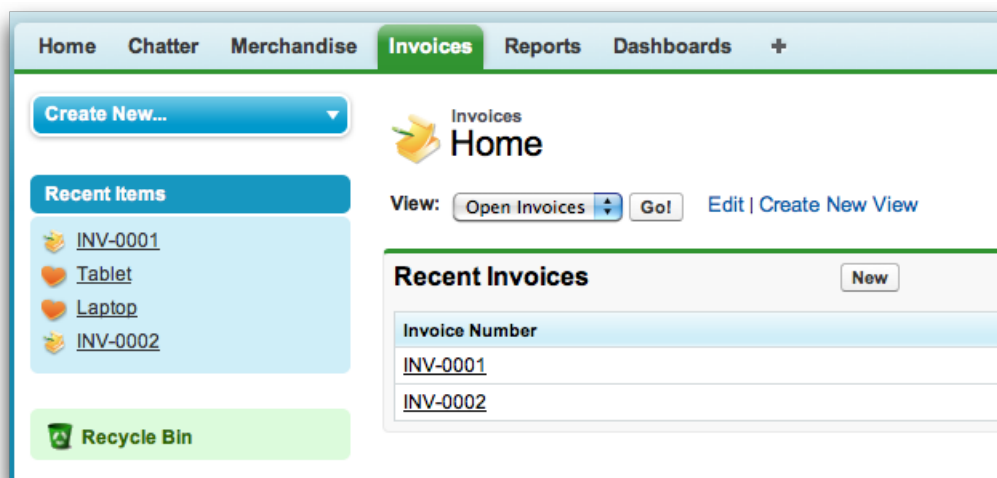
To view all standard and custom objects that are available to you in your org, click the plus icon (+). To see the records for a particular object, click the record's tab.

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

EDITIONS

Available in: Salesforce Classic

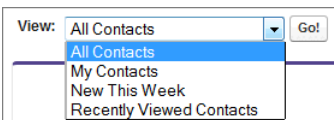
Available in: All Editions



You can [change the order](#) on page 86 of your tabs.

Find Record Data from a Tab

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



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

Action	Name ↑	Account Name	Title	Position	Phone	Email	Contact Owner
Edit Del	Adams, Arnold	ABC Labs	IT Manager	IT	1-408-555-2122	arnold.adams@tra...	mwils
Edit Del	Allen, Jack	Arbuckle Laborator...		Marketing	1-847-555-0557	jack.allen@training...	psmit
Edit Del	Amos, Jon	Vandelav Industries	Sales Manager	Account Manager	1-713-555-2405	jon.amos@training...	mwils
Edit Del	Anderson, Abby	Arbuckle Laborator...		IT	1-847-555-0590	abby.anderson@tr...	psmit
Edit Del	Arbuckle, Cadda	Arbuckle Laborator...		IT	1-847-555-0513	cadda.arbuckle@tr...	psmit
Edit Del	Buchner, Francis	ABC Labs	Account Manager	Account Manager	1-408-555-2124	francis.buchner@tr...	mwils

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

Use Related Lists to Find Record Data

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

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

Sort List Views

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

1. Open the list view.
2. Click the header for the field column you want to sort by.
An arrow appears indicating how the list is sorted: from the column's first record (↑) (alphabetically) or its last (↓).

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** editions

USER PERMISSIONS

To sort a list view:

- Read on the records in the list

Print List Views

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


You can print list views for these objects:




- Accounts
- Activities
- Campaigns
- Cases
- Contacts
- Contracts
- Custom objects
- Documents
- Leads
- Opportunities
- Permission sets
- Price books
- Profiles
- Products
- Reports
- Solutions

1. Navigate to the list view.
2. Click the print icon at the top of the page.
A printable page view displays.
3. To print the page, click **Print This Page**.

Visualize List View Data with Charts in Lightning Experience

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

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

1. On an object home page, select a list view with data you want to visualize.
2. Click .
The Charts panel appears.
3. To select a different chart, click  next to the chart name.
4. To change the graphical display of data, click  in the Charts panel and choose a new chart type.
Your data changes to the new display.

EDITIONS

Available in: Salesforce Classic

Available in: **All** editions

USER PERMISSIONS

To print a list view:

- Read on the records in the list

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To see list view charts:

- Read on the type of record included in the list

Customize Your Data View

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

[Create a Custom List View in Salesforce Classic](#)

Create a list view to see a specific set of contacts, documents, or other object records. For example, create a list view of accounts in your state, leads with a specific lead source, or opportunities above a particular amount. You can also create views of contacts, leads, users, or cases to use for mass email recipient lists.

[Create or Clone a List View in Lightning Experience](#)

Create a view to see an infinitely scrollable list of records that meet your filter criteria.

[Create a List View Chart in Lightning Experience](#)

Create a chart to visualize list view data. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view chart, you can change the data display to another type, if desired. When you create a list view chart for an object, such as Opportunities or Leads, the chart is associated with the object. The chart is available for any list view that you have permission to see for that object, except the Recently Viewed list.

[Edit List View Filters](#)

Refine or update your list views to make sure that you're seeing the most relevant records. To change which records display in a list view, edit the list view filters.

[Delete a List View in Salesforce Classic](#)


You can delete a custom view when you no longer need it.

[Delete a List View in Lightning Experience](#)


You can delete a list view when you no longer need it.

Create a Custom List View in Salesforce Classic

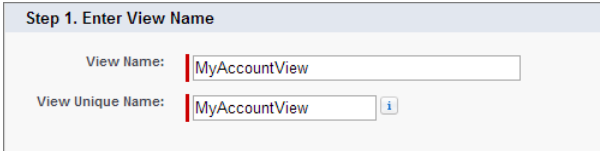
Create a list view to see a specific set of contacts, documents, or other object records. For example, create a list view of accounts in your state, leads with a specific lead source, or opportunities above a particular amount. You can also create views of contacts, leads, users, or cases to use for mass email recipient lists.

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

1. Click **Create New View** at the top of any list page or in the Views section of any tab home page.

 **Note:** If you don't see **Create New View**, you don't have the "Create and Customize List Views" permission. Contact your Salesforce admin to request it.

2. Enter the view name to display in the views drop-down list.



Step 1. Enter View Name

View Name:

View Unique Name: i

EDITIONS

Available in: **Salesforce Classic**

Available in: **All Editions**

USER PERMISSIONS

To create custom list views:


- Read on the type of record included in the list AND Create and Customize List Views

To create, edit, or delete public list views:

- Manage Public List Views

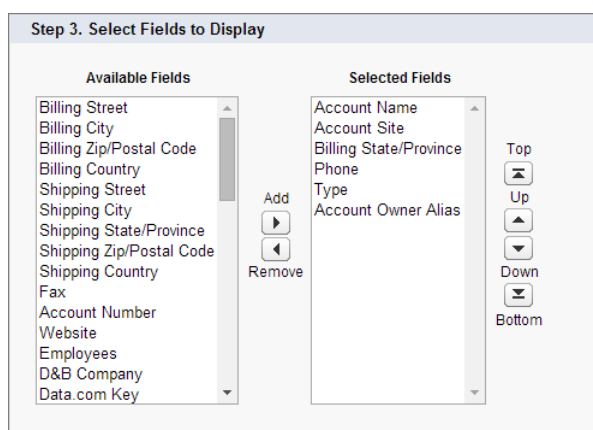
3. Enter a unique view name. The API and managed packages use this unique name.
4. Specify your filter criteria. If you want more filter fields, click **Add Filter Logic...** and then **Add Row**. You can have up to 10 fields in your filter criteria.

Usually, you filter by additional fields. For example, this image shows a list view that displays only active accounts in the org whose Billing City is equal to "San Francisco."

 **Note:** Entering illogical filter criteria, such as `someDate <= null`, can cause unexpected behavior in a list view. When you use a list view in a more strict context, such as with a Visualforce standard list controller, illogical filter criteria can cause errors.

5. Select the fields you want to display on the list view.

The default fields are automatically selected. From the fields that are in your page layout, you can display up to 15 different fields in your view.



When you select a long text area field, the list view displays up to 255 characters.


6. Click **Save**. The view appears in the View drop-down list so you can access it later.

 **Example:** Here's what your list view can look like when you're done:

Action	Account Name ↑	Account Site	Billing State/Provi...	Phone	Type	Account Owner Alias
<input type="checkbox"/> Edit Del	Acme Inc.	San Francisco	California	(415) 555-4585	Customer - Direct	AUser
<input type="checkbox"/> Edit Del	Cake LLC	San Francisco	California	(415) 555-1145	Customer - Direct	AUser
<input type="checkbox"/> Edit Del	Generic Co.	San Francisco	California	(415) 555-6363	Technology Partner	AUser

As a Salesforce admin or a user with the "Manage Public List View" permission, you have the option to hide the list view, so only you can see this list view. Open the list view. Select **Visible to certain groups of users**. Choose the type of group or role from the drop-down list, select the group or role from the list, then click **Add**.

Enterprise, Unlimited, Performance, and Developer Edition users can give access to a public group or role, including all users below that role. To share the list view:


 **Note:** List views are visible to your community users with Customer Community Plus, Partner Community, Lightning Platform Starter, and Lightning Platform Plus licenses, if the **Visible to all users** setting is enabled for views of objects in

community user profiles. To make list views visible only to your Salesforce users, select **Visible to certain groups of users**. Then share the view with the All Internal Users group or a selected set of internal groups and roles.

When implementing a community, create custom views that contain only relevant information for community users. Then make those views visible to community users by sharing them with the All Customer Portal Users group, or a set of community groups and roles.

Create or Clone a List View in Lightning Experience

Create a view to see an infinitely scrollable list of records that meet your filter criteria.

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

Actions you can take for list views are available in the List View Controls menu (⚙️).


1. Under List View Controls, select **New**. Or, click **Clone** to make a copy of the current list view.
2. Give your list a name.
3. Choose who can see this list view: just you, or all users, including Partner and Customer Portal users.
4. Click **Save**. The Filters panel appears.
5. Click **Show me**, then select **All objects** or **My Objects**.
6. Click **Done**.
7. Add and set filters to view only the records that meet your criteria. You have different options depending on the field you want to filter and the operator you choose.

Filters support values only between the minimum and maximum for a signed 23-bit integer, or between 1 and 2,147,483,648. A value outside of this range disables that filter.

- a. Click **Add Filter**.
- b. Select the field to filter, an operator, and a value.

Depending on the type of field you selected, you can either select a value or enter one of your own.

- c. Click **Done**.

 **Note:** Entering illogical filter criteria, such as `someDate <= null`, can cause unexpected behavior in a list view. When you use a list view in a more strict context, such as with a Visualforce standard list controller, illogical filter criteria can cause errors.

8. To add logic that further refines which records appear in your list view, click **Filter Logic**. To reference filters in your logic statement, use the number assigned to each filter.

 **Important:** Include every filter number in your logic statement. You can't have filters that aren't referenced in the logic statement.

Operand	Definition
AND	Finds records that match both values. 1 AND 2

EDITIONS

Available in: **Lightning Experience**

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

USER PERMISSIONS

To create list views:

- Read on the type of record included in the list AND Create and Customize List Views

To create, edit, or delete public list views:


- Manage Public List Views

Operand	Definition
OR	Finds records that match either value. 1 OR 2
NOT	Finds records that exclude values. For example, Filter 1 is Industry equals Biotechnology . You set filter logic as NOT 1 . Your report returns records that don't have Biotechnology as the Industry value.

Let's say a rep wants to see all opportunities created in July 2015 or later, that are either in late stages of negotiation or have high probability to close, or both. Here are the filters.

- a. Last Modified Date greater or equal 7/1/2015
- b. Stage contains Proposal/Price Quote, Negotiation/Review
- c. Probability greater or equal 50


Then the rep adds the logic statement: *1 AND (2 OR 3)*.

 **Note:** NOT doesn't work with parenthetical expressions. For example, the expression *1 AND NOT (2 AND 3)* evaluates as *1 AND (NOT 2 AND 3)*. In the filter results, no records are returned when you'd expect to see some records.

9. Click **Save**. The view appears in the list view drop-down list so you can access it later.


10. Optionally, choose and order the columns in your list view.



- a. From the List View Controls menu, **Select Fields to Display**.
- b. Use the arrows to add, remove, and reorder your visible fields.
- c. Click **Save**.

 **Note:** In list views, you see only the data that you have access to. You see records that you own or have read or write access to, and records shared with you. List views also include records owned by or shared with users in roles below you in the role hierarchy. You can see only the fields that are visible according to your page layout and field-level security settings.

Create a List View Chart in Lightning Experience


Create a chart to visualize list view data. There are three types of charts: vertical bar, horizontal bar, and donut. For any list view chart, you can change the data display to another type, if desired. When you create a list view chart for an object, such as Opportunities or Leads, the chart is associated with the object. The chart is available for any list view that you have permission to see for that object, except the Recently Viewed list.

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

1. On an object home page, select a list view with data you want to visualize.
2. Click .
3. In the Charts panel that appears, click .
4. Select **New Chart**.
A dialog box appears.
5. Enter a chart name.
6. Select a chart type: vertical bar, horizontal bar, or donut.
7. Select the aggregate type, aggregate field, and grouping field.

The aggregate type specifies how the field data is calculated: by sum, count, or average. The aggregate field specifies the type of data to calculate. The grouping field labels the chart segments.

8. To view your chart, click **Save**.

 **Example:** Your sales team wants to compare accounts by number of employees to focus prospecting efforts on large corporations. One of the reps creates a horizontal bar chart by selecting **Sum** as the aggregate type, **Employees** as the aggregate field, and **Account Name** as the grouping field. The chart shows the number of employees at each account by account name.

Edit List View Filters

Refine or update your list views to make sure that you're seeing the most relevant records. To change which records display in a list view, edit the list view filters.

[Edit List View Filters in Salesforce Classic](#)

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

[Edit List View Filters in Lightning Experience](#)

Edit filters on a list view from List View Controls, or click  to access the Filters panel.

EDITIONS

Available in: **Lightning Experience**

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


USER PERMISSIONS

To create list view charts:

- Read on the type of record included in the list AND Create and Customize List Views

Edit List View Filters in Salesforce Classic

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

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

1. Click **Edit** next to the list view name.


If you see Clone instead of Edit, you don't have permission to edit this list view. Use **Clone** to clone the list view, save it under a different name and then edit the cloned list view.

2. In Specify Filter Criteria, change your **Filter By Owner** selection, if desired. Add or change the **Field**, **Operator**, or **Value** selections in Filter By Additional Fields.
3. Click **Save** to apply your edited filters to the list view.


All users with access to the list view see the results of your saved changes.

Edit List View Filters in Lightning Experience

Edit filters on a list view from List View Controls, or click  to access the Filters panel.

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

Actions you can take for list views are available in the List View Controls menu ().

 **Note:** Some list views have predefined filter scopes and can't be filtered. For example, the SOQL query for a generic Team list view or the Recently Viewed list view doesn't allow further filtering of the query results.

1. From List View Controls, select **Edit List Filters**. Alternatively, click  .

If you see Clone in the controls instead of Edit List Filters, you don't have permission to edit this list view. Select **Clone** to clone a list view, save it under a different name, and select sharing settings. Then edit the filters for the cloned list view, if needed.

The Filters panel appears. Edit, remove, or add filters to view only the records that meet your criteria. You have different options depending on the field you want to filter and the operator you choose.

2. Click the filter you want to change.
3. From the Filter by dropdown menu, select an operator. For example, choose **equals**, **starts with**, or **excludes**.
4. For Value, make a selection or enter a value, then click **Done**.

Filters support values only between the minimum and maximum for a signed 23-bit integer, or between 1 and 2,147,483,648. A value outside of this range disables that filter.

5. Adjust your filter logic if needed. The filter logic statement can't reference a filter number that doesn't exist.

EDITIONS

Available in: **All Editions**

USER PERMISSIONS

To edit list views:

- Read on the type of record included in the list AND Create and Customize List Views

To create, edit, or delete public list views:

- Read on the type of record included in the list AND Create and Customize List Views

EDITIONS

Available in: Lightning Experience

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


USER PERMISSIONS

To edit list views:

- Read on the type of record included in the list AND Create and Customize List Views


To create, edit, or delete public list views:

- Read on the type of record included in the list AND Create and Customize List Views

 **Note:** NOT doesn't work with parenthetical expressions. For example, the expression *1 AND NOT (2 AND 3)* evaluates as *1 AND (NOT 2 AND 3)*. In the filter results, no records are returned when you'd expect to see some records.


- To apply the edited filters and update the current list view, click **Save**.
If you want to create a list view based on the filter changes you've made, click **Save As** instead.

Anyone with access to the list sees the results of your saved changes.

 **Example:** You want to display a set of opportunities on a board rather than in a grid, but the list view includes records with different record types. The Opportunities board can only display list views with records of a single record type. To make the view displayable on a board, edit the filters on your list view. On the Filters panel, select **Add Filter**. Choose **Opportunity Record Type** and the **equals** operator, then input the value of the record type you want. Your edited list view can now be displayed on the board.

Delete a List View in Salesforce Classic


You can delete a custom view when you no longer need it.


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

- Select a custom list view.
- Click **Edit**.
- Click **Delete**.

Delete a List View in Lightning Experience

You can delete a list view when you no longer need it.

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

- Select a list view.
- Click  to access List View Controls.
- Select **Delete**.

EDITIONS

Available in: **Salesforce Classic**

Available in: **All Editions**

USER PERMISSIONS

To delete public list views

- **Manage Public List Views**

EDITIONS

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

USER PERMISSIONS

To delete public list views

- **Manage Public List Views**

Work with Related Lists on Records

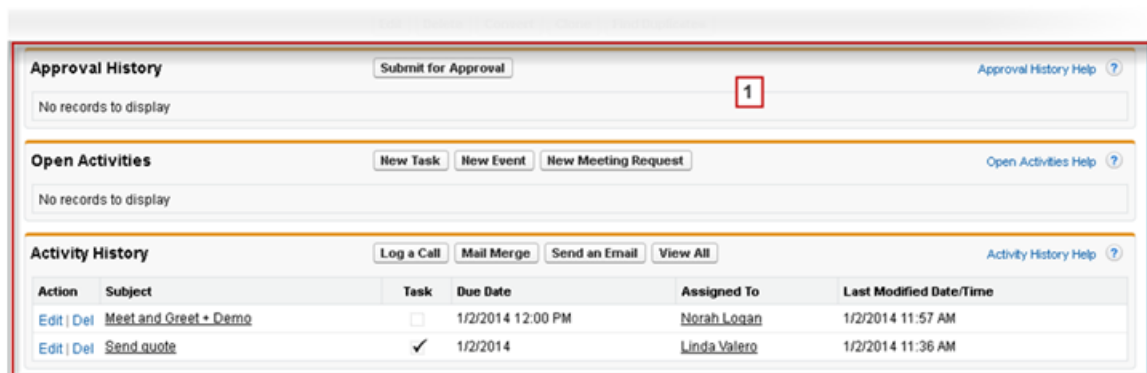
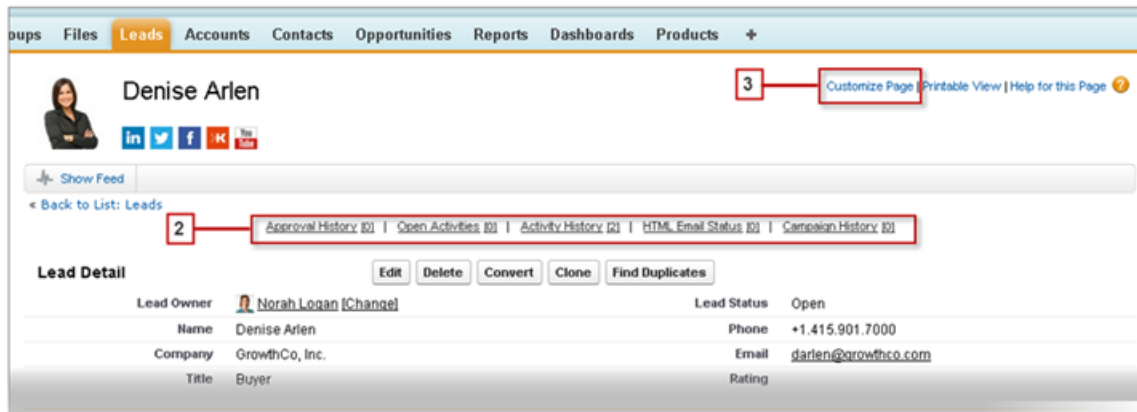
On Salesforce records, links and details for associated records are grouped within related lists. Some related lists let you perform common tasks for the related object, like create records or attach files.

For example, the Lead record offers a number of related lists, including Open Activities, which lists open activities and key activity fields. On this related list, you can create a new task, a new activity, or a new meeting request. When a task related to the lead is closed, a link to that task appears in the Lead record's Activity History related list, which displays the same key fields as Open Activities, and offers other common tasks.

EDITIONS

Available in: Salesforce Classic

Available in: All editions



It's easy to arrange and access related lists. Here's how.

- Scroll the page to find the related list you need (1).
- If related list hover links (2) are enabled in your organization, click a link to view the list in a pop-up.
- Click **Customize Page** (3) to select and arrange the available related lists you want to see.

The related lists you can view and use depend on:

- Your user permissions
- User interface and page layout customizations made by your Salesforce administrator
- Personal customizations you can make

Open Items You've Recently Viewed

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

- To open any item's detail or edit page, just click its link.
- To view key information about an item before you click the link, hover your mouse over the link. If you don't see any information, your administrator didn't enable this feature for your organization.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

Display a Visual Summary with Kanban

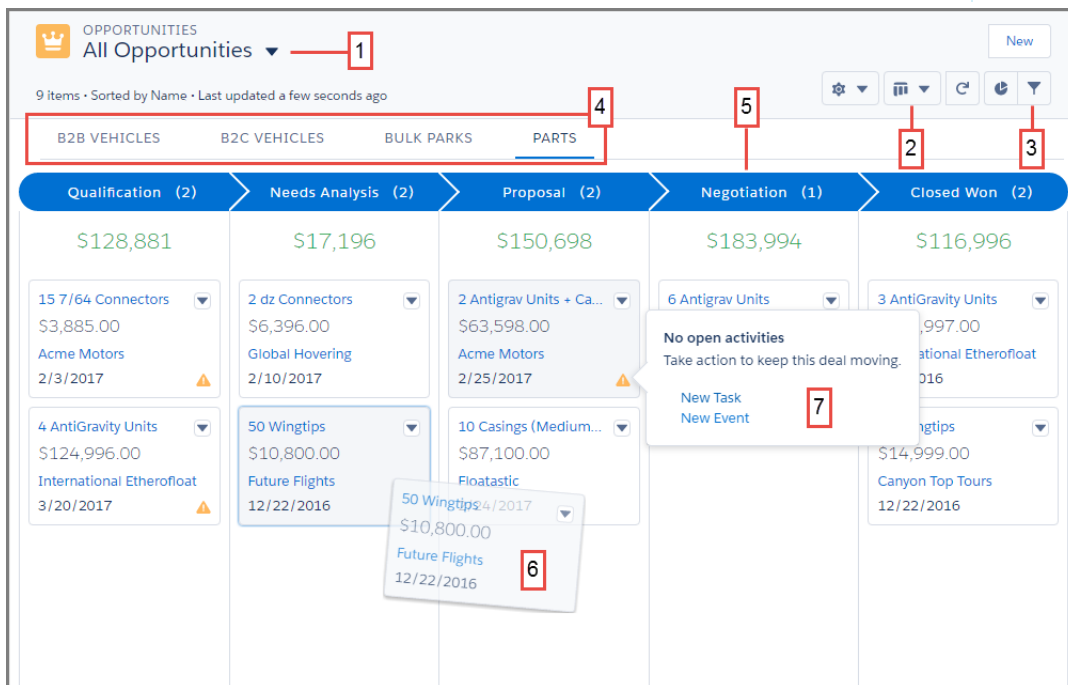
The Kanban view displays a visual summary for a selection of records. By seeing all your records at once, you can more effectively monitor your work and keep deals moving forward.

Switch to the Kanban view for almost any object from the object's list view. The Kanban view isn't available on a few objects, such as tasks.

EDITIONS

Available in: Lightning Experience

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



The records in the Kanban view are based on the selected list view (1). You can't view the Kanban for Recently Viewed list views. Easily toggle between the list view grid view and the Kanban view (2). Filter your records to select a single record type or view a particular subset of your records (3). Records are separated based on record type (4). Records are grouped into columns (5). Quickly move a record to a different column by dragging the card (6). For opportunities, alerts tell how to keep a deal on track, for example, create a task or event (7).

[Configure the Kanban View](#)

Select the fields on which to create columns and summaries in the Kanban view.

[Kanban Considerations](#)

Be aware of these limitations and considerations when using the Kanban view.

SEE ALSO:

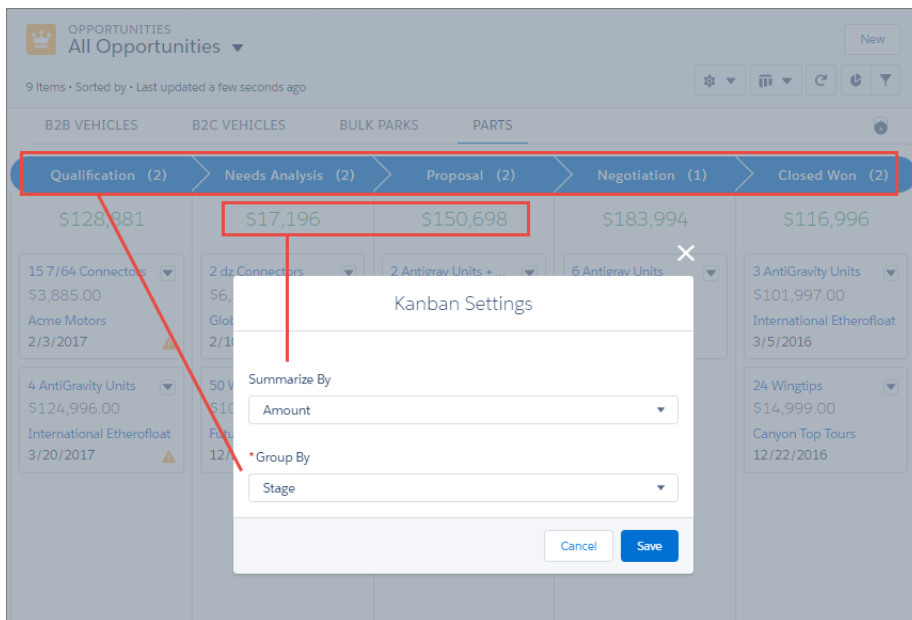
[Configure the Kanban View](#)

[Kanban Considerations](#)

Configure the Kanban View

Select the fields on which to create columns and summaries in the Kanban view.

To configure the Kanban view, click , then select **Kanban Settings**.



The screenshot shows the Salesforce Kanban view for 'All Opportunities'. The view is organized into columns based on stages: Qualification (2), Needs Analysis (2), Proposal (2), Negotiation (1), and Closed Won (2). Each column displays a summary of the total amount and a list of records. A 'Kanban Settings' dialog box is open, allowing configuration of the view. The dialog has two sections: 'Summarize By' and '* Group By'. The 'Summarize By' dropdown is set to 'Amount', and the '* Group By' dropdown is set to 'Stage'. The 'Save' button is highlighted in blue.

Qualification (2)	Needs Analysis (2)	Proposal (2)	Negotiation (1)	Closed Won (2)
\$128,881	\$17,196	\$150,698	\$183,994	\$116,996
15 7/64 Connectors \$3,885.00 Acme Motors 2/3/2017	2 dz Connectors \$6,100.00 Global 2/1/2017	2 Antierav Units + \$75,349.00 Antierav 3/1/2017	6 Antierav Units \$183,994.00 Antierav 3/1/2017	3 AntiGravity Units \$101,997.00 International Etherofloat 3/5/2016
4 AntiGravity Units \$124,996.00 International Etherofloat 3/20/2017	50 v \$10,000.00 Ftd 12/1/2017			24 Wingtips \$14,999.00 Canyon Top Tours 12/22/2016

Select a numeric or currency field to summarize, or select **None** to remove the summary from the Kanban view. To determine how your records are organized into columns, select a picklist such as **Stage** to group by, or group records by owner.

SEE ALSO:

[Display a Visual Summary with Kanban](#)

[Kanban Considerations](#)

Kanban Considerations

Be aware of these limitations and considerations when using the Kanban view.

- The Kanban view is not available from the Recently Viewed list view. Users must select another list view before they can switch to the Kanban view.
- The Kanban view displays a maximum of 200 cards.
- Kanban cards display a maximum of four fields.
- Columns aren't created from inactive picklist fields. Records associated with inactive picklist values aren't displayed in the Kanban view.
- Summaries can only be created for numeric and currency fields that are not roll up summary or formula fields
- Records are only displayed if the field selected for **Group By** is included on the page layout.
- If a record has a null value for the **Group By** field, it won't appear in the Kanban view.
- You can't group records by the `Currency` field.
- Subtabs are created for record types if the **Group By** field is included on the record type's page layout, and the record type has records associated with it.
- Drag-and-drop functionality isn't supported for touchscreens.
- Mass actions can't be performed in the Kanban view.
- If a user doesn't have access to update a record, the card is disabled and can't be dragged to a different column.

EDITIONS

Available in: Lightning Experience

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

Opportunities

- Users receive alerts on opportunities with overdue tasks, no open activities, or no activity in the last 30 days. The alerts aren't customizable.
- Opportunities can't be grouped by the `Forecast Category` field.

Leads

- Leads can't be converted in the Kanban view.
- Columns aren't created for any Lead Status value with a state of `Converted`.

Contracts

- Contracts can't be activated in the Kanban view.
- A column isn't created for the standard Contract Status of `Activated`.
- Contracts can't be grouped by the `Owner Expiration Notice` field.

Knowledge

- Knowledge articles can't be grouped by owner.

SEE ALSO:


[Display a Visual Summary with Kanban](#)

Change Your Working Division

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

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

- Select the division you want to work in from the Divisions field on the sidebar.

 **Example:** Let's say your org has set up divisions for sales areas. You can change your working division to a particular sales area and create a report to show the opportunities for just that division. Divisions are useful for organizations with large amounts of data.

Change the Dashboard on Your Home Tab

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

1. Click **Customize Page** in the Dashboard section of the Home tab.
2. Search for a dashboard and select a different dashboard from the drop-down list.
3. Click **Refresh** to refresh the data in your dashboard.

Update Your Data

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

[Create and Update Records](#)

Creating and updating records are standard procedures for most people who use Salesforce. There are various ways to create and update records in Salesforce.

[Print Records from Salesforce Classic](#)

You can print Salesforce records from most detail pages.

[Clone Records](#)

When you clone a record, the new record has the record type of the original record.

[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.

[Organize Records with Tags and Topics](#)

Topics are words or phrases that you can associate with Salesforce records to organize them around common themes. Use topics to group records by a common theme, and then use those topics to filter list views. Tags are words or short phrases that you can associate with most Salesforce records to describe and organize their data in a personalized way.

[Record Translated Names](#)

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

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**

Create and Update Records

Creating and updating records are standard procedures for most people who use Salesforce. There are various ways to create and update records in Salesforce.

Create Records from Object Tabs

Quickly create a record from a tab. For example, create an account from the Account tab.

Create Records in Feeds

If your administrator set up this action, you can create records in the feed on the home page, the Chatter tab, and record detail pages. Publishers on different feeds offer different actions.

Create Records with Quick Create

With Quick Create, you can create records from the home pages for leads, accounts, contacts, and opportunities.

Create a Record in Salesforce Lightning Experience

Create Salesforce records for opportunities, leads, tasks, notes, accounts, and contacts. Some objects (such as Account) have special *guidelines and considerations* for you to be aware of, but the *process* of creating a record is similar for all.

Create Records from the Sidebar

Use the Create New drop-down list in the Sidebar to create a record.

Update Records

Many Salesforce objects offer the convenience of inline editing for records.

Update Records Inline from a List View in Lightning Experience

Conveniently edit fields on records directly from a list view.

How Do I Update Custom Object Records?

Updating custom object records is similar to updating standard object records. Whether you can access and change a custom object record, depends on your permissions.

Delete Records


For some kinds of objects, deleting one record affects other, related records.


Formats for Currency, Dates, Times, Names, and Phone Numbers

The format used for currency, dates, times, phone numbers, and names of people in Salesforce is determined by your `Locale` setting.

Create Records from Object Tabs

Quickly create a record from a tab. For example, create an account from the Account tab.

1. Click the tab for the kind of record you want to create. For example, click the Accounts tab if you want to create an account record.
2. Click **New**.
3. Select a record type if you're prompted.
4. Enter values in the fields. Fields with a red bar () are required fields.

 **Tip:** The help includes field definitions for most objects. Search the help for the object name + "fields". For example, if you're creating or editing an account record, look up "Account Fields" in the help.

5. Save your changes, when you finish entering values for your new record. If you navigate away from the page before clicking **Save**, you lose your changes.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions


USER PERMISSIONS

To create records:

- Create on the object for the kind of record you're creating

Create Records in Feeds



If your administrator set up this action, you can create records in the feed on the home page, the Chatter tab, and record detail pages. Publishers on different feeds offer different actions.

1. In the publisher, click the quick action that corresponds to the kind of record you want to create.
For example, to add a contact to an account, navigate to the account's detail page and select **Create Contact**.
2. Enter values in the fields. Fields with a red bar () are required fields.
The help includes field definitions for most objects. Search the help for the object name + "fields". For example, if you're creating or editing an account record, look up "Account Fields" in the help.
3. When you finish entering values for your new record, click **Create**.

Create Records with Quick Create



With Quick Create, you can create records from the home pages for leads, accounts, contacts, and opportunities.

You can also create accounts from the Account lookup field results list on the Quick Create form on contacts, leads, and opportunities. Validation rules don't apply when you create new records with Quick Create.

1. Click the tab for the kind of record you want to create. To create an account while you create a contact, lead or opportunity, click the  icon next to the Account field in the Quick Create form you're using.
2. Enter values in the fields. Fields with a red bar () are required fields.
The help includes field definitions for most objects. Search the help for the object name + "fields". For example, if you're creating or editing an account record, look up "Account Fields" in the help.
3. Click **Save**.

Create a Record in Salesforce Lightning Experience

Create Salesforce records for opportunities, leads, tasks, notes, accounts, and contacts. Some objects (such as Account) have special *guidelines and considerations* for you to be aware of, but the *process* of creating a record is similar for all.

-  **Note:** This information is for Lightning Experience. If you see the App Launcher icon () on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

You can create records in different ways in Lightning Experience.

- To create records from any Salesforce page, select the item you want in the navigation menu, then click **New** in the list view.
- To create records from an existing record, click **New** for the item you want. For example, let's say you're viewing a contact record and want to create a note about the contact—click **New** in the Notes section of the contact page.

EDITIONS

Available in: Salesforce Classic

Available in: **All Editions**

USER PERMISSIONS

To create records:

- Create on the object for the kind of record you're creating

EDITIONS

Available in: Salesforce Classic

Available in: **All Editions**

USER PERMISSIONS

To create records:

- Create on the object for the kind of record you're creating

EDITIONS

Available in: Lightning Experience

Available in: **All Editions**

Create Records from the Sidebar

Use the Create New drop-down list in the Sidebar to create a record.


1. From the Create New drop-down list in the sidebar, select the type of record you want to create.
The new record page immediately displays in the appropriate tab or the Upload a File dialog box displays if you selected **File**.
2. Fill in the fields.
3. Click **Save** or **Upload to My Files** if you selected **File**.

Update Records

Many Salesforce objects offer the convenience of inline editing for records.

Not all fields on all objects can be edited inline. To find out whether a field supports inline editing, hover over it and look for a pencil icon (✎).

1. Find and open the record you want to edit.
2. Click **Edit**.
3. Enter or edit values in the fields.

 **Tip:** The help includes field definitions for most objects. Search the help for the object name + “fields”. For example, if you’re creating or editing an account record, look up “Account Fields” in the help.

4. Save your changes, when you finish entering or editing values.

Update Records Inline from a List View in Lightning Experience

Conveniently edit fields on records directly from a list view.

Not all fields on records in a list view can be edited inline. To find out whether a field supports inline editing, hover over it and look for the pencil ✎. Non-editable cells have a lock 🔒.

As always, you can edit only the records that you have access to.

To edit fields in one row of a list view:

1. From the list, hover over the cell to edit, and then click ✎. Or, double-click the cell.
2. Make your change in the editable cell or cells.
A **Save** button appears at the bottom of the list view.
3. Click **Save**.

If other people make inline edits to the same fields on a record simultaneously, only the most recent edit is saved.

EDITIONS

Available in: Salesforce Classic

The available options in the Create New drop-down list vary according to which permissions you have, which Salesforce Edition you are using, and which app you are using.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions

USER PERMISSIONS

To edit records:

- Edit on the object for the kind of record you’re editing

EDITIONS

Available in: Lightning Experience

Available in: **All** Editions

USER PERMISSIONS

To edit fields on records:



- Edit on the object for the kind of record you’re editing

Considerations for Editing Inline in a List View Lightning Experience

Consider these points when editing fields on records directly from a list view in Lightning Experience. These considerations also apply when editing records in a multi-line layout in Lightning Experience.

Considerations for Editing Inline in a List View Lightning Experience

Consider these points when editing fields on records directly from a list view in Lightning Experience. These considerations also apply when editing records in a multi-line layout in Lightning Experience.

Not all fields on records in a list view or multi-line layout view can be edited inline. To find out whether a field supports inline editing, hover over it and look for the pencil . Non-editable cells have a lock .

You can't edit inline in a list view or on a multi-line view if:

- It contains more than one record type.
- It uses filter logic that contains OR clauses.

You can edit inline in Recently Viewed or Team list views that are predefined to contain only one record type. You can also edit Tasks on the Tasks object home page, even though they're not in a list view.

Some fields or field types aren't editable inline.

- Built-in fields like Record ID or Created Date (never editable from the user interface)
- Standard fields of type date/time, auto number, roll-up summary, record type, master-detail, long text area, Rich Text, checkbox, or hierarchy
- Custom date/time fields
- Compound fields including Name, Account Name, address fields, and geolocation fields

 **Note:** First Name and Last Name are editable.

- The opportunity fields Expected Revenue and Forecast Category
- Custom dependent picklists
- Encrypted text fields

EDITIONS

Available in: **Lightning Experience**

Available in: **All Editions**

How Do I Update Custom Object Records?

Updating custom object records is similar to updating standard object records. Whether you can access and change a custom object record, depends on your permissions.

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

SEE ALSO:

[Update Records](#)

[What's the Difference Between Standard and Custom Objects?](#)

Delete Records

For some kinds of objects, deleting one record affects other, related records.

Before you delete a record, check whether there are related records. For example, if you delete an account or contact, all associated assets are also deleted.

1. Find and open the record you want to delete.
2. Click **Delete**.

Formats for Currency, Dates, Times, Names, and Phone Numbers

The format used for currency, dates, times, phone numbers, and names of people in Salesforce is determined by your `Locale` setting.

To find out what date/time format your `Locale` setting uses:

1. From your personal settings, enter *Advanced User Details* in the `Quick Find` box, then select **Advanced User Details**. No results? Enter *Personal Information* in the `Quick Find` box, then select **Personal Information**.
2. View the date/time format used in the read-only `Created By` field. This is the format you should use for entering dates and times in Salesforce fields.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view custom object records:

- Read on the custom object

To change custom object records:

- Edit on the custom object

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions

USER PERMISSIONS

To delete records:

- Delete on the object for the kind of record you're deleting


EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

Currency

In most Salesforce editions, the format and currency type you can use for currency fields, such as Quota or Annual Revenue, are determined by the Currency Locale setting for your company. In Group, Professional, Enterprise, Unlimited, and Performance Edition orgs that use multiple currencies, the format and currency type are determined by the Currency field in the record you're creating or editing.


 **Tip:** When you enter a monetary amount (or any other type of number), you can use the shortcuts **k**, **m**, or **b** to indicate thousands, millions, or billions. For example, when you enter *50k* it appears as 50,000. However, these shortcuts do not work for filter criteria.

Dates and Times

Many fields allow you to enter a date or a time in the format specified by your personal Locale setting.


When entering dates, you can choose a date from the calendar, or manually enter a date.

Only dates within a certain range are valid. The earliest valid date is 1700-01-01T00:00:00Z GMT, or just after midnight on January 1, 1700. The latest valid date is 4000-12-31T00:00:00Z GMT, or just after midnight on December 31, 4000. These values are offset by your time zone. For example, in the Pacific time zone, the earliest valid date is 1699-12-31T16:00:00, or 4:00 PM on December 31, 1699.

-  **Tip:**
- Years appear and are saved as four digits, but you can enter the final two digits and Salesforce determines the first two. Entries *60* through *99* are assumed to be in the 20th century (for example: 1964), and entries *00* to *59* are assumed to be in the 21st century (for example: 2012).
 - If your locale is set to English (United States) and you enter numbers for month and day only (example: *01/15*), Salesforce supplies the current year.
 - If your locale and language are English, you can enter words like *Yesterday*, *Today*, and *Tomorrow*, or any day of the week, and Salesforce figures it out. Weekday names (such as *Monday*) are always considered to be in the following week.

Phone Numbers

When you enter phone numbers in various phone fields, Salesforce preserves whatever phone number format you enter. However, if your Locale is set to English (United States) or English (Canada), 10-digit phone numbers and 11-digit numbers that start with "1" are formatted as (800) 555-1212 when you save the record.


-  **Tip:**
- If you do not want the parentheses-space-hyphen formatting ((800) 555-1212) for a 10- or 11-digit number, enter a "+" before the number. For example: *+49 8178 94 07-0*.
 - If your 10- and 11-digit phone numbers have Salesforce's automatic format, you might need to enter the parentheses when specifying filter conditions. For example: *Phone starts with (415)*.

Print Records from Salesforce Classic

You can print Salesforce records from most detail pages.

1. Click the **Printable View** link located in the upper right corner of most detail pages.

A new browser window opens with the record displayed in a simple, print-ready format. You can collapse and expand individual sections in the printable view by clicking the triangles next to the section headings.

 **Note:** On the Console tab, you can click the print icon (🖨) to open a record's printable view.

2. Click **Print This Page** or use your browser's print function to send the page to a printer.

Clone Records

When you clone a record, the new record has the record type of the original record.

1. Click **Clone** on an existing object record.

If the record type of the cloned record isn't available in your profile or permission sets, the new record adopts your default record type.

2. Enter or change any information for the new record.

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

3. Save your changes.

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 your user permissions and the type of object you're transferring, you can select which related items to transfer.
5. Save your changes.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To clone custom object records:

- Create on the custom object

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To transfer single records:

- Transfer Record


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:

[Considerations for Changing a Record's Owner](#)

Considerations for Changing a Record's Owner

When you change a record's owner, some of the items that are related to the record are also 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	Transferred items
Account	<ul style="list-style-type: none"> • Account team members (In Salesforce Classic, the <code>Keep Account Team</code> option must be selected. In Lightning Experience, it happens automatically). • Open activities that are owned by the original account owner. Closed activities aren't transferred. • Open cases that are owned by the original account owner (In Salesforce Classic, the <code>Transfer open cases</code> option must be selected. In Lightning Experience, open cases aren't transferred.) • Closed cases that are owned by the original account owner (In Salesforce Classic, the <code>Transfer closed cases</code> option must be selected. In Lightning Experience, closed cases aren't transferred.) • Contracts with Draft status. Contracts with Activated status are available to the new owner with read-only access. • Orders with Draft status that are either associated with a transferring contract or no contract. Orders with Activated status are available to the new owner with read-only access. • Divisions are transferred to the new account owner's division only when the <code>Change Division</code> option is selected. • Open opportunities that are owned by the original record owner. • Open opportunities that are <i>not</i> owned by the original record owner (In Salesforce Classic and Lightning Experience, the <code>Transfer open opportunities not owned by the existing account owner</code> option must be selected). • Closed opportunities that are owned by the original record owner (In Salesforce Classic, the <code>Transfer closed</code>

EDITIONS

Available in: Salesforce Classic and Lightning Experience


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

Record	Transferred items
	<p>opportunities option must be selected. In Lightning Experience, these closed opportunities aren't transferred.)</p> <ul style="list-style-type: none"> • Opportunity team members (In Salesforce Classic, the <code>Keep Opportunity Team on opportunities transferred to new owner</code> option must be selected. In Lightning Experience, it happens automatically). When opportunity teams are transferred, opportunity splits are preserved and split percentages are assigned to the new owner. • Attachments and Notes taken with the classic note-taking tool that are owned by the original account owner
Contact	<ul style="list-style-type: none"> • Notes taken with the classic note-taking tool • Open activities that are owned by the original contact owner. Closed activities aren't transferred. • Attachments
Order	<ul style="list-style-type: none"> • Open tasks • Future events • Items aren't transferred if either the original or new owner is a member of a queue.
Opportunity	<ul style="list-style-type: none"> • Notes taken with the classic note-taking tool • Attachments • Open activities that are owned by the current opportunity owner. Closed activities aren't transferred. • Opportunity team members only when the <code>Keep Opportunity Team</code> option is selected. When opportunity teams are transferred, opportunity splits and any notes on splits are preserved and split percentages are assigned to the new owner.
Lead	<ul style="list-style-type: none"> • Notes taken with the classic note-taking tool • Attachments • Open activities that are owned by the original record owner (except when you change lead ownership using the <code>Assign using active assignment rule</code> checkbox)
Case	<ul style="list-style-type: none"> • Notes taken with the classic note-taking tool • Attachments • Open activities that are owned by the original record owner. Closed activities aren't transferred.
Campaign	<ul style="list-style-type: none"> • Attachments • Open activities that are owned by the original record owner
Contract	<ul style="list-style-type: none"> • Notes taken with the classic note-taking tool

Record

Transferred items

	<ul style="list-style-type: none"> • Attachments • Open activities that are owned by the original record owner • Orders with <i>Draft</i> status
Custom object	<ul style="list-style-type: none"> • Open activities that are owned by the original record owner (Salesforce Classic only) • Notes taken with the classic note-taking tool (Salesforce Classic only) • Attachments (Salesforce Classic only)

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

SEE ALSO:

[Change a Record's Owner](#)

Organize Records with Tags and Topics

Topics are words or phrases that you can associate with Salesforce records to organize them around common themes. Use topics to group records by a common theme, and then use those topics to filter list views. Tags are words or short phrases that you can associate with most Salesforce records to describe and organize their data in a personalized way.

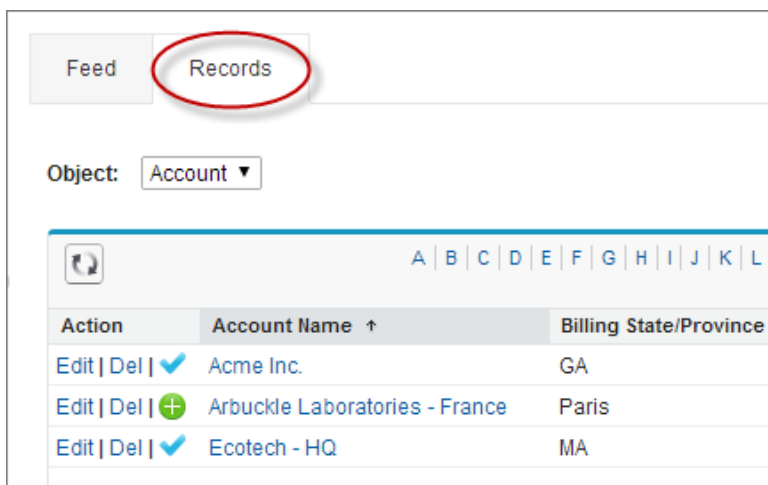
When Chatter is enabled, you can also see records on a topic in one central place—the Records tab of the topic detail page. For example, if a number of accounts are participating in a conference, you might add the topic *User Conference* to their records. You could then use that topic to filter an accounts list view, or (with Chatter) view the accounts together on the Records tab of the *User Conference* topic page.

Here's an example topic detail page, with the Records tab showing accounts on the topic. (If you don't see a Records tab like this for a particular topic, the topic hasn't been added to any records.)

EDITIONS

Available in: **Salesforce Classic**

Available in: **All Editions**



Admins can enable or disable topics for accounts, assets, campaigns, cases, contacts, contracts, files, leads, opportunities, orders, solutions, custom objects, and English articles. While you can enable topics for tasks, the Records tab is not supported for tasks. Topics on files are added to files automatically when topics are added to the feed posts they're attached to.

[Add Topics to Records](#)

Add topics to quickly organize records around common themes, retrieve them in list views, and (with Chatter) view them on topic detail pages.

[Remove Topics from Records](#)

Remove a topic from a record if it no longer applies.

[Tag Records](#)


Use tags to group records from various objects by a common theme. Add tags in search criteria to make finding information fast and intuitive.

[Remove Tags from Records](#)

Add Topics to Records

Add topics to quickly organize records around common themes, retrieve them in list views, and (with Chatter) view them on topic detail pages.

Topics for objects must be enabled before you can add topics to records of that object type.

 **Note:** All topic names are public and appear in search results, but this doesn't affect the visibility of records that have topics.

1. On the top of the record detail page under the record name, click **Click to add topics**. If the record already has topics, click **Topics**.

EDITIONS

Available in: Salesforce Classic

Available in: **All Editions**

USER PERMISSIONS

To add topics to a record:

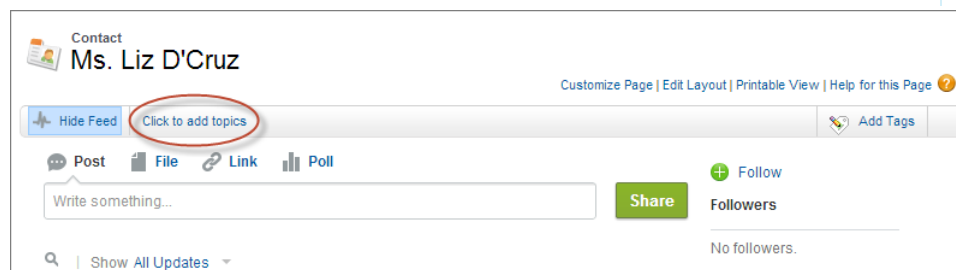
- Read and Edit on the record

AND

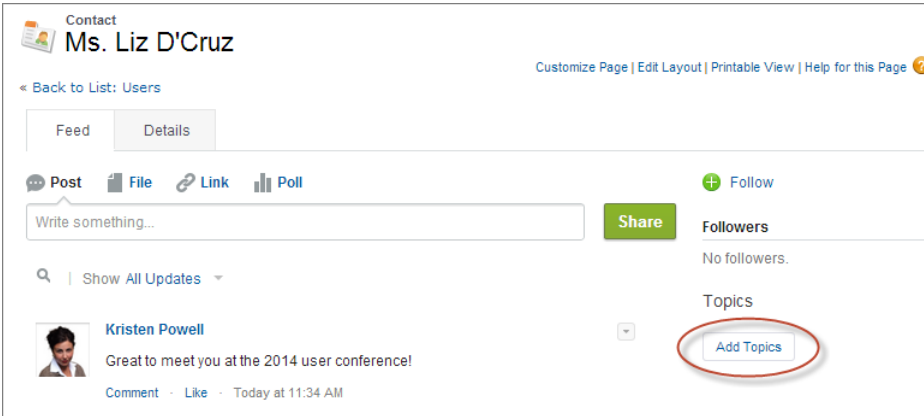
Assign Topics to add existing topics

OR

Create Topics to add new topics



If your administrator enabled feed-based layouts, click **Add Topics** in the sidebar of the feed view.



2. In the topic editor, start typing your text. As you type, you can pick a topic from the list of suggestions, or keep typing to create your own unique topic. To add more than one topic, type a comma after each topic.

Commas (,) and closing square brackets (]) automatically end a topic. Other punctuation, symbols, and separators are supported in topic names.

Records can have up to 100 topics.


3. When you're done adding topics, click **Done** or press **Enter**.

You can now use topics you add to records to filter your list views. And if your administrator enabled Chatter, topics added to records become links to topic detail pages, where associated records appear on the Records tab for easy access. (Note that Chatter posts on a record aren't automatically added to a record's topics; you must add the topics to the posts.)

Remove Topics from Records

Remove a topic from a record if it no longer applies.

Removing topics doesn't delete them. Before you remove a topic from a record, consider whether someone else added it; they may be using the topic to track the record.

1. On the top of the record detail page, click **Topics**.
2. Click  next to the topic you want removed from the record.
3. Click **Done** or press ENTER.

Removing a topic from a record removes the record from any list views using that topic as a filter. If Chatter is enabled, the record is also removed from the Records tab of the topic detail page.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions

USER PERMISSIONS

To remove topics from a record:

- Read and Edit on the record
- AND
- Assign Topics


Tag Records

Use tags to group records from various objects by a common theme. Add tags in search criteria to make finding information fast and intuitive.

1. On the top right corner of the record detail page, click **Add Tags** or **Edit Tags**.
2. In the `Personal Tags` or `Public Tags` text boxes, enter comma-separated lists of the tags that you want to associate with the record.

Tags can only contain letters, numbers, spaces, dashes, and underscores, and must contain at least one letter or number. As you enter new tags, up to 10 tags that have already been defined are displayed as auto-complete suggestions. The list of suggestions changes to show only those tags that match the prefix you have entered.

There are limits on the number of personal and public tags you can create and apply to records. If you exceed the number of tags, any new tags you add aren't saved. Go to the Tags page and delete infrequently used tags.

 **Example:** For example, you could tag contacts and leads you met at a conference with the phrase *User Conference 2011*. You can then search for the *User Conference 2011* tag and click that tag in search results to retrieve those records.

Remove Tags from Records

1. On the top right corner of the record detail page, click **Edit Tags**.
2. Next to the `Personal Tags` or `Public Tags` text boxes, click **[X]** next to the tag that you want to remove.
3. Save your changes.

If the tag that you removed is the last instance of the tag, the tag is deleted from your organization completely. If other records use the tag, the tag still appears in search results and the Tags page.

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)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit tags on a record:

- Read on the record

To rename or delete public tags:

- Tag Manager

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit tags on a record:

- Read on the record

EDITIONS

Available in: Salesforce Classic

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

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

Standard Field	Local Name Field
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)

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.

Analyze Your Data

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

Here's a quick intro to running, sorting, filtering, and visualizing your data.

[Run a Report](#)

Reports give you access to the data your organization has accumulated over time, enabling you to make informed decisions.

[Sort Report Results](#)

Sort a report by the data in a particular column by clicking that column's heading. Clicking a column header sorts data according to that column's ascending order: text is sorted from A to Z, numerical data is sorted from lowest to highest, and time/date data is sorted from earliest to latest.

[Filter Your Report](#)

Does your report give you more data than you need? Use filters to pare down your report until it only shows the data that you want.

[Create Filters that Use Special Picklist Values](#)

Use special picklist values for your search criteria. These special picklists have values of either `True` or `False`.

[Filter Operators Reference](#)

The operator in a filter is like the verb in a sentence. Operators specify how filter criteria relate to one another. Refer to this list of filter operators when setting filters on list views, reports, dashboards, and some custom fields.

[Visualize Your Data with Dashboards](#)

Create a *dashboard* to show data from your report with a visual component, for example a pie chart.

Run a Report

Reports give you access to the data your organization has accumulated over time, enabling you to make informed decisions.

To run a report, find it on the Reports tab and click the report name. Most reports run automatically when you click the name.

1. Click the Reports tab.
2. Find the report you want to run and click the report name.
If you're already viewing a report, click **Run Report** to run it.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To run reports:

- Run Reports

To schedule reports:

- Schedule Reports

To create, edit, and delete reports:

- Create and Customize Reports

AND

Report Builder

Sort Report Results

Sort a report by the data in a particular column by clicking that column’s heading. Clicking a column header sorts data according to that column’s ascending order: text is sorted from A to Z, numerical data is sorted from lowest to highest, and time/date data is sorted from earliest to latest.

- To reverse the sort order, click the column heading a second time.
- If the floating report header is enabled for your organization, sort behavior is slightly different. When users sort data by clicking a floating report heading, the report refreshes and redirects users to the beginning of report results.
- In a report with multiple grouping levels, you can sort by the summary value that defines each grouping. For example, take an Opportunities report that’s grouped by type of business. Each `Type` grouping is in turn grouped by `Stage`, and each `Stage` grouping is grouped by `Lead Source`. Now you can sort the `Type` groupings by amount, the `Stage` grouping by stage, and the `Lead Source` grouping by record count.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

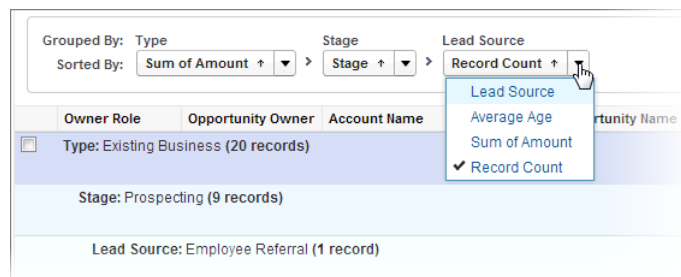
Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Available in: Enhanced Folder Sharing and Legacy Folder Sharing

USER PERMISSIONS

To sort report results:

- **Legacy Folder Sharing**
Run Reports
- **Enhanced Folder Sharing**
Run Reports



Filter Your Report

Does your report give you more data than you need? Use filters to pare down your report until it only shows the data that you want.

Let's say you have a report of Accounts with fields like `State` and `Annual Revenue`. The report already has these filters:

- `State` includes California, Arizona, Nevada
- `Annual Revenue` greater than 1000000

These two filters return results for all accounts located in California, Arizona, and Nevada that generate an annual revenue greater than \$1,000,000. Now you also want to filter by industry, specifically, the Banking industry. Here's how you do that.

1. On the Reports tab, click a report to open it.
2. Click **Customize**.
3. Click **Add** and select a Field Filter from the list.
A new filter row appears below the other two filters.

4. Click  next to the filter field and select a filter.

In our account filter example, you'd select **Industry**. Which filters are available in your organization depends on the fields that your administrator set up for account records.

5. Select an operator for the filter and type the filter value in the next field.
In our account filter example, you'd select **equals** and type *Banking*.


6. Click **Save**.

Now your report shows Banking industry Accounts in California, Arizona, and Nevada with an annual revenue above \$1,000,000.00.


Create Filters that Use Special Picklist Values

Use special picklist values for your search criteria. These special picklists have values of either `True` or `False`.

For example, to show all opportunities you have won, enter *Won equals True* as your search criteria. To show all closed/lost opportunities, enter *Closed equals True* and *Won equals False*.

-  **Note:** If you are creating filter criteria for a report or list view, the lookup icon automatically displays when you choose to filter on one of the special picklists. Click the lookup icon to choose the value `True` or `False`. Alternatively, you can manually enter *True* or *False* in the filter criteria.

These are the available fields and their values:

Special Picklist Field	Value	Description
Accounts and contacts: Is Person Account	True	The account is a person account. Your administrator could have customized the name of this field. This field displays as the person account icon ().
	False	The account is a business account.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create, edit, and delete reports:

- Create and Customize Reports
- AND
- Report Builder

To create custom list views:

- Read on the type of record included in the list

To create, edit, or delete public list views:

- Manage Public List Views

EDITIONS


Available in: Salesforce Classic

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

Special Picklist Field	Value	Description
Accounts, leads, and opportunities: Partner Account	True	The account is a partner account, or the lead or opportunity owner is a partner user.
	False	The account is not a partner account or the lead or opportunity owner is not a partner user.
Activities: All-day	True	Applies only to events, not tasks. The event is marked as an all day event.
	False	The event has a specific time.
Activities: Closed	True	Applies only to tasks, not events. The task has been closed, that is, the task <code>status</code> field has a "Closed" value.
	False	Task is still open.
Activities: Event Invitation (Only for reports)	True	Applies only to events, not tasks. The event is the meeting invite sent to another user for a multi-person event.
	False	The event is the original multi-person event assigned to the event host.
	False	Activity does not have a green sheet.
Activities: Task	True	Activity is a task, not an event.
	False	Activity is an event.
Campaigns: Active	True	Campaign is active and can be chosen from various campaign picklists.
	False	Campaign is inactive.
Cases: Closed	True	The case is closed, that is, the case <code>status</code> field has a "Closed" value.
	False	Case is still open.
Cases: Escalated	True	Case has been automatically escalated via your org's escalation rule.
	False	Case has not been escalated.
Cases: New Self-Service Comment	True	Case has a new comment added by a Self-Service user.
	False	Case does not have a new Self-Service comment.
Cases: Open (Only for reports)	True	The case is open, that is, the case <code>status</code> has a value that is not equivalent to "Closed."
	False	Case has been closed.
Cases: Self-Service Commented	True	Case has a comment added by a Self-Service user.
	False	Case does not have a Self-Service comment.
Contacts: Do Not Call	True	The contact cannot be included in a call recipient list.



Special Picklist Field	Value	Description
	False	The contact can receive calls.
Contacts: Email Opt Out	True	The contact cannot be included in a mass email recipient list.
	False	The contact can receive mass email.
Contacts: Fax Opt Out	True	The contact cannot be included in a fax recipient list.
	False	The contact can receive faxes.
Contacts: Self-Service Active (Only for reports)	True	The contact is enabled to log in to your Self-Service portal.
	False	The contact is not enabled for Self-Service.
Leads: Converted (Only for reports)	True	The lead has been converted.
	False	The lead has not been converted.
Leads: Do Not Call	True	The lead cannot be included in a call recipient list.
	False	The lead can receive calls.
Leads: Email Opt Out	True	The lead cannot be included in a mass email recipient list.
	False	The lead can receive mass email.
Leads: Fax Opt Out	True	The lead cannot be included in a mass fax recipient list.
	False	The lead can receive faxes.
Leads: Unread	True	The lead has not yet been viewed or edited by the owner since it was assigned to that user.
	False	The lead has been viewed or edited at least once by the owner since it was assigned.
Opportunities: Closed	True	The opportunity is closed, that is, the <code>Stage</code> field has a value of the type Closed/Won or Closed/Lost.
	False	The opportunity is still open.
Opportunities: Has Products	True	Products have been added to the opportunity.
	False	Products have not been added to the opportunity.
Opportunities: Is Split	True	The opportunity has revenue or overlay splits.
	False	The opportunity does not have revenue or overlay splits.
Opportunities: Primary (Only for Partner Opportunities report)	True	The partner for the opportunity has been marked as the primary partner.
	False	The partner for the opportunity has not been marked as the primary partner.
Opportunities: Private	True	The opportunity owner has checked the <code>Private</code> box on the opportunity edit page.

Special Picklist Field	Value	Description
	False	The <code>Private</code> box on the opportunity is not checked.
Opportunities: Won	True	The opportunity is closed and won, that is, the <code>Stage</code> field has a value of the type <code>Closed/Won</code> .
	False	The opportunity has not been won. The <code>Stage</code> field may have a value of the type <code>Open</code> or <code>Closed/Lost</code> .
Products: Active	True	Product is active and can be added to opportunities in Enterprise, Unlimited, and Performance Edition orgs.
	False	Product is inactive and cannot be added to opportunities.
Product: Has Quantity Schedule	True	Product has a default quantity schedule.
	False	Product does not have a default quantity schedule.
Product: Has Revenue Schedule	True	Product has a default revenue schedule.
	False	Product does not have a default revenue schedule.
Solutions: Visible in Self-Service Portal	True	The solution has been marked <code>Visible in Self-Service Portal</code> and is visible to Self-Service portal users.
	False	Solution is not marked <code>Visible in Self-Service Portal</code> and is not visible to Self-Service portal users.
Solutions: Reviewed	True	The solution has been reviewed, that is, the solution <code>Status</code> field has a "Reviewed" value.
	False	Solution is not reviewed.
Solutions Out of Date	True	The translated solution has not been updated to match the master solution with which it is associated.
	False	The translated solution has been updated to match the master solution with which it is associated.
Users: Active	True	User is active and can log in.
	False	User is inactive and cannot log in.
Users: Offline User	True	User has access to use Connect Offline.
	False	User is not enabled for Connect Offline use.
Users: Marketing User	True	User can manage campaigns.
	False	User is not enabled to manage campaigns.
User: Is Partner	True	User is a partner user.
	False	User is not a partner user.

 **Note:** The special picklists you can view are only those that are visible in your page layout and field-level security settings.

Filter Operators Reference

The operator in a filter is like the verb in a sentence. Operators specify how filter criteria relate to one another. Refer to this list of filter operators when setting filters on list views, reports, dashboards, and some custom fields.

Operator	Uses
equals	Use for an exact match. For example, "Created equals today."
less than	Use for results that are less than the value you enter. For example, "Quota less than 20000" returns records where the quota field ranges from 0 to 19,999.99.
greater than	Use when you want results that exceed the value you enter; for example, "Quota greater than 20000" returns records where the quota amount begins at 20,000.01.
less or equal	Use for results that match or are less than the value you enter.
greater or equal	Use for results that match or exceed the value you enter.
not equal to	Shows results that don't have the value you enter. This operator is useful for eliminating empty fields. For example, "Email not equal to <blank>." <p> Note: If evaluating more than one value, none of the specified values can exist on the record. For example, if you specify <code>not equal to A & C</code>, only records where the value is neither A nor C are returned.</p>
contains	Use for fields that include your search string, but sometimes also include other information. For example, "Account contains California" would find California Travel, California Pro Shop, and Surf California. Keep in mind that if you enter a short search string, it can match a longer word. For example, "Account contains pro" would find California Pro Shop and Promotions Corporation. This operator is not case-sensitive.
does not contain	Eliminates records that don't contain the value you enter. For example, "Mailing Address Line 2 does not contain P. O. Box." <p> Note: When specifying filter criteria on roll-up summary fields, <code>does not contain</code> uses "or" logic on comma-separated values. On list views, reports, and dashboards, <code>does not contain</code> uses "and" logic.</p> <p>This operator is not case-sensitive.</p>
starts with	Use when you know what your value starts with, but not the exact text. This operator is a narrower search term than "contains." For example, if you enter "Account starts with California," you find California Travel and California Pro Shop, but not Surf California.
includes	Available when you choose a multi-select picklist as the selected field. Use this operator to find records that include one or more of the values you enter. <p>For example, if you enter "Interests includes hockey, football, baseball," you find records that have only hockey selected, and records that have two or three of the values entered. Results do not include partial matches of values.</p>

Operator	Uses
excludes	<p>Available when you choose a multi-select picklist as the selected field. Use this operator to find records that do not contain any values that match the ones entered.</p> <p>For example, if you enter “Interests exclude wine, golf,” your report lists records that contain any other values from that picklist, including values that are blank. Results do not include partial matches of values.</p> <p>Enter values on separate lines.</p>
between	<p>Available for dashboard filters only. Use to filter on ranges of values. For each range, the filter returns results that are greater than or equal to the minimum value and less than the maximum value.</p> <p>For example, if you enter “Number of Employees from 100 through 500,” your results include accounts with 100 employees up to those with 499 employees. Accounts with 500 employees aren’t included in the results.</p>
within	<p>Available when you create list views based on a Geolocation custom field. Shows results that are within the specified radius from a fixed latitude and longitude. For example, if you enter “Warehouse location within 50 miles 37.775° –122.418°,” your list view includes all warehouses within a 50-mile radius of San Francisco, California.</p>

Visualize Your Data with Dashboards

USER PERMISSIONS

To create dashboards:

Legacy Folder Sharing

Run Reports AND Manage Dashboards

Enhanced Folder Sharing

Run Reports AND Create and Customize Dashboards

To edit and delete dashboards you created:

Legacy Folder Sharing

Run Reports AND Manage Dashboards

Enhanced Folder Sharing

Run Reports AND Create and Customize Dashboards

To edit and delete dashboards you created in public folders:

Legacy Folder Sharing

Run Reports AND Manage Dashboards

Enhanced Folder Sharing

Edit My Dashboards

To edit and delete dashboards you didn’t create in public folders:

Legacy Folder Sharing

Run Reports, Manage Dashboards AND View All Data

Enhanced Folder Sharing

Manage Dashboards in Public Folders

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Group** (View Only), **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Available in: both Legacy Folder Sharing and Enhanced Folder Sharing

To create, edit, and delete dynamic dashboards:

Legacy Folder Sharing

Manage Dynamic Dashboards

Enhanced Folder Sharing

Manage Dynamic Dashboards

Create a *dashboard* to show data from your report with a visual component, for example a pie chart.


Let's say you have a report that shows Banking industry Accounts in California, Arizona, and Nevada with an annual revenue above \$1,000,000.00. Now you want to visualize this report for your team with a pie chart. Here's how you do that.

1. In Lightning Experience, click the Dashboards tab. Or, in Salesforce Classic, click the Reports tab.
2. Click **New Dashboard**.
3. In Lightning Experience, click **+ Component**. Then, select a report, and display it as a donut chart. Or, in Salesforce Classic, click the pie chart icon in the Components tab and drag it to one of the columns in the layout. Then, click the **Data Sources** tab and expand the report list, find your report, and drag and drop it on the pie chart.
4. Add a title for your chart.
5. Click **Save**.

Note and Attachment Fields

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

Fields for Notes

 **Note:** In the Salesforce app and Lightning Experience, there are additional fields for relating multiple records to the note.

Field	Description
Body	Text of the note. Can hold up to 50 MB of data.
Title	Subject of note. Maximum of 200 characters.

EDITIONS

Available in: The Salesforce app, Salesforce Classic, and Lightning Experience

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

Fields for the Old Note-Taking Tool

Field	Description
Body	Text of the note. Can hold up to 32 KB of data.
Private	Checkbox to indicate that note is only accessible to the owner and administrators. For administrators to view private notes, they need the "View All Data" permission; to edit them, they need the "Modify All Data" permission.
Title	Short description of note. Maximum of 80 characters.

Fields for Attachments

Attachment Fields	
Field	Description
Description	Description of the uploaded file. Maximum of 500 characters.
File Name	Name of the uploaded file.
Private	Checkbox to indicate that the attachment is only accessible to the person who created or attached it and to administrators. For administrators to view private attachments, they need the "View All Data" permission; to edit them, they need the "Modify All Data" permission.
Share With Connections	Checkbox to indicate that the attachment is shared with connections when the parent record is shared. This checkbox is only available if Salesforce to Salesforce is enabled, the parent record is shared, and the attachment is public.
Size	Size of the uploaded file.

Brand Your Org in Lightning Experience

Rally your team around your brand and important initiatives, like a new product launch, with a set of custom brand images and colors in your org. We call them *themes*. You can choose one of Salesforce's built-in themes, or create your own custom themes with just a few clicks.

1. From Setup, enter *Themes and Branding* in the Quick Find box, then select **Themes and Branding**.
2. View, preview, and activate an existing theme, or click **New Theme** to create your own.

Keep these considerations in mind when working with themes:

- Only one theme can be active at a time, and a theme applies to your entire org.
- By default, orgs use the built-in Lightning Blue theme.
- You can create up to 300 custom themes, but you can't modify or clone the built-in themes provided by Salesforce.
- Themes don't apply to Salesforce Classic or to mobile.
- Chatter External users see the built-in Lightning Blue theme only.

SEE ALSO:

[Create Lightning Apps](#)

EDITIONS

Available in: Lightning Experience

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

Work on Mobile Devices

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

[Salesforce Mobile Product Comparison](#)

The Salesforce app, SalesforceA, Salesforce Mobile Classic, Salesforce Authenticator, and Salesforce Einstein Analytics are available on different mobile devices and in different editions, with different support options.

[Salesforce App](#)

The Salesforce app is Salesforce on the go! This enterprise-class mobile experience gives you real-time access to the same information you see in the office, but organized for getting work done between customer meetings, while waiting for a flight, even when you're in line for coffee. The intuitive interface makes it easy to navigate and interact with data on a touchscreen, so you can review and update information with just a few taps. And the app includes many of your org's customizations, so the app is tailored to your business needs.

[Salesforce Mobile Classic](#)

The Salesforce Mobile Classic app provides mobile access to your Salesforce data from Android™ and iPhone® devices. You can view, create, edit, and delete records, keep track of your activities, view your dashboards, run simple reports, and log calls and emails. Your Salesforce admin must assign you a mobile license before you can use Salesforce Mobile Classic.

Salesforce Mobile Product Comparison

The Salesforce app, SalesforceA, Salesforce Mobile Classic, Salesforce Authenticator, and Salesforce Einstein Analytics are available on different mobile devices and in different editions, with different support options.

! **Important:** On December 1, 2017, Salesforce Mobile Classic will be removed from the App Store and Google Play, and access to currently installed Salesforce Mobile Classic apps will be immediately disabled for all users and orgs. For more information about the retirement of Salesforce Mobile Classic and your transition options, see [Salesforce Mobile Classic App to Retire on December 1, 2017](#) and join the conversation in this [group](#) in the Trailblazer Community.

Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
The Salesforce App	<p>Access and update Salesforce data from an interface that's optimized for navigating and working on your touchscreen mobile device.</p> <p>You can view, edit, and create records, manage your activities, view your dashboards and reports, and use Chatter. The app supports many standard objects and list views, all your organization's custom objects, the integration of other mobile apps, and many of your organization's Salesforce customizations (including Visualforce tabs and pages and Lightning Pages).</p>	<p>Free for customers using:</p> <ul style="list-style-type: none"> • Personal Edition • Group Edition • Essentials Edition • Professional Edition • Enterprise Edition • Unlimited Edition • Performance Edition • Developer Edition • Contact Manager Edition 	<ul style="list-style-type: none"> • Android phones • Android tablets • iPad models • iPhone models • Windows 8.1 and Windows 10 phones (mobile browser app only) 	<p>Yes, for viewing data.</p> <p>Beta: Create and edit data (Salesforce for Android, v9.0 or later and Salesforce for iOS, v10.0 or later)</p>
SalesforceA	<p>Manage users and view information for Salesforce organizations from your smartphone.</p>	<p>Free for customers using:</p> <ul style="list-style-type: none"> • Group Edition • Essentials Edition 	<ul style="list-style-type: none"> • Android phones • Android tablets • iPad models 	No

Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
	<p>Deactivate or freeze users, reset passwords, unlock users, edit user details, and assign permission sets.</p> <p>This app is restricted to users with the "Manage Users" permission.</p>	<ul style="list-style-type: none"> Professional Edition Enterprise Edition Unlimited Edition Performance Edition Developer Edition Contact Manager Edition 	<ul style="list-style-type: none"> iPhone models iPod Touch 	
Salesforce Mobile Classic	You can view your dashboards, run simple reports, log calls and emails, track your activities, and create, edit, and delete records. Most standard Sales objects and some Service objects are available. Custom objects and configurations are also supported.	<p>App requires mobile licenses and is available for:</p> <ul style="list-style-type: none"> Professional Edition Enterprise Edition Unlimited Edition Performance Edition Developer Edition 	<ul style="list-style-type: none"> Android phones Android tablets iPhone models 	Yes
Salesforce Authenticator	Secure your account by using your mobile device for two-factor authentication. Verify your identity or block unrecognized activity with a one-tap response to a push notification. If you enable location services for the app, you can set trusted locations, such as your home or office. If automation is available, the app can verify your identity automatically when you're in a trusted location. Get a code to use as a backup identity verification method.	<p>Free for all customers using:</p> <ul style="list-style-type: none"> Group Edition Essentials Edition Professional Edition Enterprise Edition Performance Edition Unlimited Edition Developer Edition Contact Manager Edition 	<ul style="list-style-type: none"> Android phones iPhone 5 or later models 	Yes, for generating verification codes


Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
Salesforce Einstein Analytics	Get important analytics information and make data-driven decisions from any configured mobile device. Explore dashboards, lenses, and datasets; filter, group, aggregate, and visualize data; drill in to the data of most interest; and share and take action.	Available at additional cost for customers using: <ul style="list-style-type: none"> Enterprise Edition Performance Edition Unlimited Edition Developer Edition 	<ul style="list-style-type: none"> iPad models iPhone models Android models 	No

SEE ALSO:

[Salesforce App](#)[Help Users From Anywhere With SalesforceA](#)[Salesforce Mobile Classic](#)[Salesforce Authenticator](#)

Salesforce App

The Salesforce app is Salesforce on the go! This enterprise-class mobile experience gives you real-time access to the same information you see in the office, but organized for getting work done between customer meetings, while waiting for a flight, even when you're in line for coffee. The intuitive interface makes it easy to navigate and interact with data on a touchscreen, so you can review and update information with just a few taps. And the app includes many of your org's customizations, so the app is tailored to your business needs.

 **Note:** The Salesforce app puts key data and features at your disposal, wherever you are. But there are business activities that are probably better done from your laptop or desktop. To see data or do actions that aren't available in the app, use Lightning Experience or Salesforce Classic instead.

[Get the Salesforce App](#)

The way you access Salesforce depends on how you want to work: using an app installed on your device or using a mobile browser. It's possible that some of the Salesforce versions are disabled for your organization—ask your Salesforce administrator about your options.

[Salesforce App Features: What's Available in Each Version](#)

Salesforce is available on Android and iOS devices from Google Play and the App Store. It's also available as mobile web in supported mobile browsers. In most cases, all of the "flavors" include the same features. But there are some differences between the experiences, often related to differences in the mobile platforms on which Salesforce is supported.

[Requirements for the Salesforce App](#)

The Salesforce app is available for most Salesforce editions and user license types. The app is supported on a variety of mobile platforms, with some minimum operating system and mobile browser requirements.

EDITIONS

The Salesforce app available in: **All** editions except Database.com

[What Data Is Available in the Salesforce App?](#)

The Salesforce app uses your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets to determine the data that's available to you. You see most of the objects, record types, fields, and page layouts that you do when working in the full Salesforce site. But not all Salesforce data is available in the app.

[Why Can't I Log in to the Salesforce App?](#)

You're certain that you're using your correct Salesforce credentials but you can't log in to Salesforce? There are several common reasons why you might be having trouble.

[Turn Salesforce Mobile Web Off or On](#)

When Salesforce mobile web is enabled for your organization, you automatically redirect to this experience when you log in to Salesforce from a supported mobile browser. Using the full Salesforce site in a mobile browser isn't supported. But it is possible to turn off mobile web if you need to access Salesforce Classic from your mobile device for awhile.

[Find Help in the Salesforce App](#)

Tap **Help** in the Salesforce navigation menu to troubleshoot and learn new skills.

[Help Resources for the Salesforce App](#)

These resources provide information about using the Salesforce mobile app, setting up your organization to use the app, and developing for the app.

SEE ALSO:

[Help Resources for the Salesforce App](#)

Get the Salesforce App

The way you access Salesforce depends on how you want to work: using an app installed on your device or using a mobile browser. It's possible that some of the Salesforce versions are disabled for your organization—ask your Salesforce administrator about your options.

Install Salesforce for Android or Salesforce for iOS

Salesforce is available for Android and iOS devices that meet minimum platform requirements. You can download and install Salesforce from Google Play or the App Store.

Once the app is installed, launch it from your home screen and log in to your Salesforce account. You may be prompted to create a security PIN. By default, you're connected to your production environment.

 **Note:** If you're not able to log in, verify with your Salesforce admin that you're enabled to use the Salesforce app.

Access Salesforce Mobile Web

Salesforce mobile web runs in a mobile browser on Android, iOS, and Windows devices that meet minimum platform requirements. Mobile web is a great option if your organization prevents installing apps on your corporate-issued device.

If mobile web is enabled for your organization, you're automatically redirected to Salesforce when you log in to Salesforce from a supported mobile browser. If Salesforce doesn't automatically start for you, make sure you didn't turn off the redirection to mobile web and that you're using a supported browser.

EDITIONS

The Salesforce app available in: **All** editions except Database.com

(From most unsupported mobile browsers, you're redirected to Salesforce Classic instead. If you're using an iOS device, you can access mobile web from Google Chrome for iOS or when tapping a Salesforce link in Gmail for iOS, but working in either of these environments isn't supported by Salesforce.)

SEE ALSO:

[Requirements for the Salesforce App](#)

[Why Can't I Log in to the Salesforce App?](#)

[Turn Salesforce Mobile Web Off or On](#)

Salesforce App Features: What's Available in Each Version

Salesforce is available on Android and iOS devices from Google Play and the App Store. It's also available as mobile web in supported mobile browsers. In most cases, all of the "flavors" include the same features. But there are some differences between the experiences, often related to differences in the mobile platforms on which Salesforce is supported.

Feature	Salesforce for Android	Salesforce for iOS	Mobile Web
Navigation and Actions			
Access up to 200 list views per object	✓	✓	✓
See visual snapshots of business data on list view charts			✓ (tablets only)
Sort and filter list views	✓	✓	✓
Do actions like make phone calls, log calls, and send emails (Phone calls supported on iPhones and Android phones only)	✓	✓	✓
Use quick actions created for your organization	✓	✓	✓
See Google Maps images in standard address fields	✓	✓	✓
Search			
Search for Salesforce records	✓	✓	✓
Scope global searches to find records by object			✓
See matching search results for all records, not just those that have been recently viewed			✓
Sort search results			✓
Get more relevant results with dependent lookup filters	✓	✓	✓
Get automatic spell checking and correction on search keywords	✓	✓	✓
Use global search to find Chatter posts in the "All Company" feed			✓
Use Spotlight Search to find Salesforce data without opening Salesforce		✓	

Feature	Salesforce for Android	Salesforce for iOS	Mobile Web
Relationship and Data Management			
Add new records and update existing records	✓	✓	✓
Prevent the creation of duplicate records	✓	✓	✓
Stay up to date about important companies and industries with News	✓	✓	✓
See company logos for accounts	✓	✓	✓
Locate, associate, and view Twitter profiles for Salesforce accounts, contacts, and leads	✓	✓	✓
Track relationships between accounts and contacts with Contacts to Multiple Accounts	✓	✓	✓
Add contacts to Salesforce from mobile device contact lists	✓	✓	
See lead scores	✓	✓	✓
Convert qualified leads to contacts	✓	✓	✓
Use Path on opportunities to follow sales processes and get deals closed	✓	✓	✓
Work with account teams and opportunity teams	✓	✓	✓
Add products, quotes, and multiple influential campaigns to opportunities	✓	✓	✓
Manage campaign member statuses	✓	✓	✓
View forecast data		✓	
Work with data stored outside of Salesforce	✓	✓	✓
Productivity (Salesforce Today, Notes, Events, Tasks, Email)			
Use Today to prepare for and manage the day's events, join conference calls, and log mobile calendar events in Salesforce	✓	✓	
Add contacts to Salesforce from events in Today	✓	✓	
Take rich text meeting notes and easily relate them to records	✓	✓	✓
Add images to notes		✓	
Create tasks from Notes	✓	✓	✓
Create tasks from Chatter posts			✓
Create recurring and follow-up tasks	✓	✓	✓
Track, close, or reopen tasks	✓	✓	✓

Feature	Salesforce for Android	Salesforce for iOS	Mobile Web
Do quick task updates with a tap: edit comments or change a due date, status, or priority	✓	✓	✓
Create and view Salesforce events	✓	✓	✓
Send email from Salesforce using SalesforceIQ Inbox	✓	✓	
Work.com			
Use Work.com Coaching, Goals, Rewards, and Skills <i>(Skills available in Android only)</i>	✓	✓	✓
Customer Service Tools			
Work with cases and case emails	✓	✓	✓
Use Social Customer Service to track cases and respond to Twitter Tweets in real time	✓	✓	✓
View Salesforce Knowledge articles	✓	✓	✓
Track purchased products with Assets	✓	✓	✓
Streamline field service with Work Orders (including milestones, linked articles, and work order hierarchies)	✓	✓	✓
View scheduled services and navigate to service locations with Field Service Lightning	✓	✓	✓
Reports and Dashboards			
View dashboards, dashboard components (including Visualforce dashboard components), and reports	✓	✓	✓
View Lightning Experience reports, dashboards, and charts	✓	✓	✓
Sort data in reports	✓	✓	✓
Apply dashboard filters	✓	✓	✓
Share snapshots of Enhanced Charts in the Chatter feed			✓
Salesforce Files			
Use Salesforce Files	✓	✓	✓
Use Salesforce Files if Chatter is turned off			✓
Browse and share files from external data sources, such as SharePoint, OneDrive for Business, Google Drive, and Box <i>(Requires Files Connect)</i>	✓	✓	✓
Edit Microsoft Office 365 files	✓	✓	
Access Content Libraries		✓	

Feature	Salesforce for Android	Salesforce for iOS	Mobile Web
Chatter (Feeds, Topics, Profiles, Groups)			
Use Chatter feeds, people, and groups	✓	✓	✓
Search in the main Chatter feed	✓	✓	✓
Mute Chatter posts			✓
View, edit, and follow feed entries organized by topic; add multiple topics to posts			✓
Bundle multiple record updates into a single post			✓
Attach photos or files to posts or comments, or use quick actions to post photos or files	✓	✓	✓
Share Chatter posts	✓	✓	
See previews of files posted to posts and comments	✓	✓	✓
Double-tap to add or remove bookmarks for Chatter posts		✓	
Ask questions and get answers in the feed			✓
Escalate questions in Chatter to cases			✓
Edit user profile details	✓		✓
Change the user profile picture	✓	✓	✓
Add group photos	✓	✓	✓
Add records to groups	✓	✓	✓
Collaborate with more privacy in unlisted Chatter groups	✓	✓	✓
Post announcements in group feeds	✓	✓	✓
Manage groups, including add group members	✓	✓	✓
Use Salesforce if Chatter is turned off	✓	✓	✓
Use quick actions in Salesforce if Chatter is turned off	✓	✓	✓
Launch Salesforce from Chatter email notifications and digest links	✓	✓	✓
Salesforce Communities			
Access communities created using the Salesforce Tabs + Visualforce template	✓	✓	✓
Business Logic and Process Automation			
Submit records for approval	✓	✓	✓

Feature	Salesforce for Android	Salesforce for iOS	Mobile Web
View the status of pending approvals and approve or reject approval requests		✓	✓
Resume or delete paused flow interviews	✓	✓	✓
Notifications			
Receive in-app notifications	✓	✓	✓
Receive push notifications	✓	✓	
Configure the push notifications that are sent	✓	✓	
Offline			
View cached data when working offline	✓	✓	
Create, edit, and delete records for recently accessed objects when offline (Beta)	✓	✓	
Access and Security			
Log in faster using password manager apps right from the Salesforce login page		✓	
Configure connections to multiple instances from the login page	✓	✓	
Switch between multiple Salesforce accounts or communities without leaving the app	✓	✓	
Open most Salesforce URLs directly in Salesforce	✓	✓	
Control app access with a security passcode	✓	✓	
Use Connected App security settings to meet industry compliance regulations	✓	✓	
Get enhanced security with Mobile Device Management (MDM)	✓	✓	
Customizations and User/App Settings			
View Visualforce pages	✓	✓	✓
Access Lightning pages, and custom and third-party apps	✓	✓	✓
See a customized selection and arrangement of actions in the action bar and list item actions	✓	✓	✓
See custom branding	✓	✓	✓
See field-level help	✓	✓	✓

SEE ALSO:

[Help Resources for the Salesforce App](#)

Requirements for the Salesforce App

The Salesforce app is available for most Salesforce editions and user license types. The app is supported on a variety of mobile platforms, with some minimum operating system and mobile browser requirements.

Mobile Platform Requirements

Salesforce is available on phones and tablets that meet these mobile platform requirements.

Operating System and Version Requirements	Mobile Browser Requirements [*]
Android 4.4 or later	Google Chrome on Android
iOS 10.3 or later	Apple Safari on iOS

* Mobile browser requirements apply to the Salesforce mobile browser app only.

- The latest mobile browser version is required.
- When using the mobile browser app, we recommend turning off Incognito Mode in Chrome, Private Browsing in Safari, or InPrivate Browsing in Edge or Internet Explorer.

Mobile Devices Used for Testing


Salesforce performs automated and manual testing of Salesforce for Android, Salesforce for iOS, and Salesforce mobile web on a select set of mobile devices. This is the current list of devices used for testing.

Platform	Phones	Tablets
Android	<ul style="list-style-type: none"> • Google Pixel 2 / Pixel 2 XL • Google Pixel / Pixel XL • Google Nexus 6P • Samsung Galaxy S8 • Samsung Galaxy S7 • Samsung Galaxy S6 • Samsung Galaxy S5 • Samsung Galaxy Note 5 • Samsung Galaxy Note 4 	<ul style="list-style-type: none"> • Samsung Tab A 9.7 • Samsung Tab A 8.0
iOS	<ul style="list-style-type: none"> • iPhone X • iPhone 8 / 8 Plus • iPhone 7 / 7 Plus • iPhone 6S / 6S Plus • iPhone 6 / 6 Plus • iPhone 5S • iPhone SE 	<ul style="list-style-type: none"> • iPad Pro 12.9" • iPad Pro 9.7" • iPad Air 2 • iPad Mini 4

EDITIONS

The Salesforce app available in: **All** editions except Database.com

Customers aren't blocked from using Salesforce on untested devices as long as they meet current platform requirements. Salesforce may not be able to replicate some issues for customers using Salesforce on untested devices on due to manufacturer-specific customizations. The list of Salesforce-tested devices is subject to change, with or without advance notice.


 **Note:** Salesforce treats touch-enabled laptops, including Microsoft Surface and Surface Pro devices, as laptops instead of tablets. It's not possible to access the Salesforce app on these devices. Users are always redirected to the full site experience that's enabled for them—Lightning Experience or Salesforce Classic. Only standard keyboard and mouse inputs are supported on these types of devices.

On most devices, Salesforce is supported in portrait orientation only. The one exception is when using the Salesforce for iOS on iPad tablets, where both portrait and landscape orientation are supported.

Salesforce Editions and Licenses

See which Salesforce editions and user license types support using the Salesforce app.

Salesforce Editions	
<p>Salesforce is available in these editions:</p> <ul style="list-style-type: none"> • Personal Edition • Group Edition • Professional Edition • Enterprise Edition • Performance Edition • Unlimited Edition • Developer Edition • Contact Manager Edition 	<p>But not in these editions:</p> <ul style="list-style-type: none"> • Database.com Edition
User License Types	
<p>These user license types can access the Salesforce app. A special mobile license isn't required.</p> <ul style="list-style-type: none"> • Salesforce users • Salesforce Platform and Lightning Platform users • Chatter Plus users (also known as Chatter Only), Chatter Free users, and Chatter External users* • Customer Community, Customer Community Plus, and Partner Community external users • Portal users who are a member of a Salesforce community 	<p>These user license types don't have access to the mobile app:</p> <ul style="list-style-type: none"> • Portal users (unless a member of a Salesforce community) • Database.com users • Sites and Site.com users • Data.com users • Work.com users

 **Note:** You can access the same data and functionality that's available to you in the full site, as determined by your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets.

* Chatter Plus, Chatter Free, and Chatter External users must have the "API Enabled" profile permission turned on to use Salesforce for Android and Salesforce for iOS. Chatter External users who have API access can't access Groups or People list views when using a downloadable app.

Wireless Connection

A Wi-Fi® or cellular network connection is needed to communicate with Salesforce. For cellular connections, a 3G network or faster is required. For the best performance, we recommend using Wi-Fi or LTE.

If you're using one of Salesforce for Android or Salesforce for iOS, you can view your most recently accessed records, and create and edit records, when your device is offline.

Salesforce App and Reverse Proxy

Salesforce does not provide support or recommend an implementation involving a reverse proxy. Issues that may arise from the use a reverse proxy and the Salesforce app are not supported. If customers encounter issues with the app, they must perform due diligence and isolate such issues outside of the reverse proxy integration.

SEE ALSO:

- [Access Communities in the Salesforce App](#)
- [Locale and Language Support for the Salesforce App](#)
- [Salesforce App Accessibility Considerations](#)
- [What Data Is Available in the Salesforce App?](#)

What Data Is Available in the Salesforce App?

The Salesforce app uses your organization's Salesforce edition, your user license type, and your assigned user profile and permission sets to determine the data that's available to you. You see most of the objects, record types, fields, and page layouts that you do when working in the full Salesforce site. But not all Salesforce data is available in the app.

These objects are available as items in the app navigation menu. You can create, view, and edit records for these objects unless noted otherwise.

- Accounts
- Assets
- Campaigns
- Cases
- Contacts
- Content Libraries (*iOS downloadable app only*)
- Contracts
- D&B Company (*view only, for Data.com Prospector and Data.com Clean customers*)
- Dashboards (*view only*)
- Events
- Files
- Field Service Lightning (Operating Hours, Service Appointments, Service Resources, Service Territories, Work Types) (*mobile browser app only*)
- Forecasts (*iOS downloadable app only*)
- Knowledge Articles (*view only*)
- Leads
- Live Chat Transcripts
- Opportunities
- Orders

EDITIONS

The Salesforce app available in: **All** editions except Database.com

- Quotes (*create from opportunities only*)
- Reports (*view only*)
- Social Personas and Social Posts
- Tasks
- Work.com Coaching, Goals, Thanks, Rewards, and Skills (*Skills not available in the iOS downloadable app*)
- Work Orders
- Custom objects that have a tab you can access
- Salesforce Connect external objects that are searchable and have a tab you can access


With some exceptions, all the standard and custom fields are available on these records. And you can work with most of the related lists for these objects.

If Chatter is enabled, you can access feeds, groups, people (user profiles), and topics. (Topics is available in the mobile browser app only.) You can access user profiles even if Chatter is disabled.

If you're using Salesforce for Android or Salesforce for iOS, you can use Salesforce Today to prepare for meetings, stay in touch with customers, quickly join conference calls, and generally manage your day.

Salesforce Navigation Menu

You can access all these objects from the navigation menu. The navigation menu helps you focus on the objects you work with most frequently. Tap **More** at the bottom of the Recent section to see the full list of all objects available to you in the Salesforce app />.

 **Tip:** If you're new to Salesforce and don't yet have a history of recent items, you initially see these objects in the Recent section of the navigation menu: Accounts, Cases, Contacts, Files, Groups (unless added directly to the navigation menu), Leads, Opportunities, and People (unless added directly to the navigation menu).

As you spend time working in the Salesforce app and the full Salesforce site, the objects that you use the most eventually replace the default ones in the Recent section and become the objects that are available for global searches in Salesforce.

It can take up to 15 days for the objects that you work with regularly to appear in the Recent section. To make objects appear under Recent immediately, pin them from your search results in the full site.

When doing a global search in the Salesforce app, you can find records for the objects that appear in the Recent section only. To find records for the other objects that are in the full object list when the Recent section is expanded, search from the object's home page.

SEE ALSO:

[Data Access and Views: What's Different or Not Available in the Salesforce App](#)

Why Can't I Log in to the Salesforce App?

You're certain that you're using your correct Salesforce credentials but you can't log in to Salesforce? There are several common reasons why you might be having trouble.

- Make sure that you actually have permission to use the Salesforce app. Salesforce admins can control who's able to use Salesforce for Android and Salesforce for iOS, and can also disable access to mobile web, for you or your entire company. If you're not sure that you have access, check with your admin.
- If you're Salesforce for Android or Salesforce for iOS, make sure you're logging in to the correct instance—production, sandbox, or a custom domain. By default, Salesforce connects to your production environment. If your

EDITIONS

The Salesforce app available in: **All** editions except Database.com

organization uses single sign-on, configure the app to point to a different page during login. The same is true to connect Salesforce to a sandbox environment for testing purposes or to log in using a Community URL.

A custom domain is in the form of `https://universalcontainers.my.salesforce.com`, where `universalcontainers` is a name selected by your admin. Your admin can provide you with the domain name to use.

- To connect Salesforce for iOS to a different instance, use [these steps](#).
- To connect Salesforce for Android to a different instance, use [these steps](#).
- Make sure that your username and password are stored correctly if you're using a password manager app such as 1Password™ or LastPass™. (Your Salesforce admin must first set up password management for your org. Using a password manager app to log in is available with Salesforce for iOS, version 11.0 or later).

If you're still unable to log in, ask your admin for help.

SEE ALSO:


[Get the Salesforce App](#)

[Access Communities in the Salesforce App](#)

[Requirements for the Salesforce App](#)


Turn Salesforce Mobile Web Off or On

When Salesforce mobile web is enabled for your organization, you automatically redirect to this experience when you log in to Salesforce from a supported mobile browser. Using the full Salesforce site in a mobile browser isn't supported. But it is possible to turn off mobile web if you need to access Salesforce Classic from your mobile device for awhile.

 **Note:** If you disable automatic redirection to Salesforce mobile web, you're turning off automatic access for any supported browser, on any of your mobile devices. For example, if you turn off mobile web from your tablet, you can't use mobile web on your smartphone.

These steps don't affect the Salesforce for Android and Salesforce for iOS, which always display the Salesforce interface.

To turn off the mobile browser app from within the app:

1. Tap .
2. Tap **Full Site**.

You switch immediately to the Salesforce Classic full site. It's not possible to access Lightning Experience from any mobile browser.

The full site is now your default environment whenever you log in from a mobile browser. You can switch back to Salesforce mobile web using the **Go to Salesforce mobile app** link in the full site footer and mobile web returns to being your default environment.

To turn off the mobile web from the full site:

1. From your personal settings, enter *Advanced User Details* in the Quick Find box, then select **Advanced User Details**. No results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**.
2. Deselect **Mobile User**.
3. Save your changes.

EDITIONS

The Salesforce app available in: **All** editions except Database.com



To turn mobile web back on from the full site, repeat the previous steps and select the `Mobile User` checkbox.

SEE ALSO:

[Get the Salesforce App](#)

Find Help in the Salesforce App

Tap **Help** in the Salesforce navigation menu to troubleshoot and learn new skills.

To access the help set, tap  to open the navigation menu. Then scroll to the bottom of the menu and tap **Help**. Simply browse the help set or tap  to search using keywords.

To see more help resources, check out [Help Resources for the Salesforce App](#) on page 152.

Help Resources for the Salesforce App

These resources provide information about using the Salesforce mobile app, setting up your organization to use the app, and developing for the app.

Getting Started with Salesforce

Trailhead

Salesforce Mobile App Basics [HTML](#)

Guides

Using the Salesforce App [PDF](#)

Help Topics

Introduction to the Salesforce App [HTML](#)

Salesforce App Features: What's Available in Each Version [HTML](#)

Requirements for the Salesforce App [HTML](#)

What Data Is Available in the Salesforce App? [HTML](#)

Get the Salesforce App [HTML](#)

What's Different or Not Available in the Salesforce App [HTML](#)

Help in the App

Salesforce App Help [HTML](#)

Salesforce App Videos

Take Your Tasks from Desktop to Mobile (Salesforce Classic) [Video](#)

Accounts and Contacts on the Go (Salesforce Classic) [Video](#)

How to Use Notes [Video](#)

EDITIONS

The Salesforce app available in: **All** editions except Database.com

EDITIONS

The Salesforce app available in: **All** editions except Database.com

Setting Up and Customizing Salesforce

Release Notes

Salesforce App Section in the Salesforce Winter '18 Release Notes	PDF	HTML
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Trailhead

Salesforce Mobile App Rollout		HTML
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Salesforce Mobile App Basics		HTML
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Salesforce Mobile App Security and Compliance		HTML
---	--	----------------------

Guides

Salesforce App Admin Guide	PDF	HTML
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Salesforce App Admin Rollout Guide		HTML
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Help Topics

Put the Salesforce App In Your Users' Hands		HTML
---	--	----------------------

Salesforce App Setup Options		HTML
------------------------------	--	----------------------

How Actions Are Ordered in the Salesforce Mobile App Action Bar		HTML
---	--	----------------------

Your Org's Branding in the Salesforce App		HTML
---	--	----------------------

Enable Visualforce Pages for the Salesforce App		HTML
---	--	----------------------

Work Offline with the Salesforce App		HTML
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Developing for Salesforce

Trailhead

Visualforce Mobile		HTML
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Guides

Salesforce App Developer Guide		
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Salesforce App Developer Guide	PDF	HTML
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Salesforce Mobile URL Schemes for Android and iOS	PDF	
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Salesforce Mobile Security Guide	PDF	
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Salesforce Mobile Classic

The Salesforce Mobile Classic app provides mobile access to your Salesforce data from Android™ and iPhone® devices. You can view, create, edit, and delete records, keep track of your activities, view your dashboards, run simple reports, and log calls and emails. Your Salesforce admin must assign you a mobile license before you can use Salesforce Mobile Classic.

Important: On December 1, 2017, Salesforce Mobile Classic will be removed from the App Store and Google Play, and access to currently installed Salesforce Mobile Classic apps will be immediately disabled for all users and orgs. For more information about the retirement of Salesforce Mobile Classic and your transition options, see [Salesforce Mobile Classic App to Retire on December 1, 2017](#) and join the conversation in this [group](#) in the Trailblazer Community.

Salesforce Mobile Classic stores your Salesforce records in a local database on your mobile device, which means you can use the Salesforce Mobile Classic app even when a data connection is unavailable. Salesforce Mobile Classic periodically polls Salesforce for new and updated records, saving you from the hassle of manually synchronizing your data.

Check the [list of supported mobile devices](#) to see if you can use the Salesforce Mobile Classic app on your smartphone.

[Installing the Salesforce Mobile Classic App](#)

Installing the Salesforce Mobile Classic App

Important: On December 1, 2017, Salesforce Mobile Classic will be removed from the App Store and Google Play, and access to currently installed Salesforce Mobile Classic apps will be immediately disabled for all users and orgs. For more information about the retirement of Salesforce Mobile Classic and your transition options, see [Salesforce Mobile Classic App to Retire on December 1, 2017](#) and join the conversation in this [group](#) in the Trailblazer Community.

You can install the Salesforce Mobile Classic app on any [supported](#) Android or iPhone device.

The easiest way to install Salesforce Mobile Classic is to visit <http://mobile.salesforce.com> from your mobile device and follow the on-screen instructions.

Or, you can use the installation steps for your type of device.

Android Installation

Salesforce Mobile Classic is available for download from Google Play. To access Google Play, your Android device must be connected to the network. You also need a Google account to download applications. If you don't already have a Google account, go to <https://accounts.google.com> and select **Sign up** to set one up.

To install Salesforce Mobile Classic from Google Play:

1. From the Apps screen of your Android device, select the Google Play Store.
2. Select the **Search** field, and type *salesforce*.

EDITIONS

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

Mobile app available in: **Performance, Unlimited,** and **Developer** Editions for orgs created prior to Winter '17

Mobile app available for an extra cost in: **Professional** and **Enterprise** Editions for orgs created prior to May 1, 2016

Mobile app not available for orgs created in Winter '17 or later

EDITIONS

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

Mobile app available in: **Performance, Unlimited,** and **Developer** Editions for orgs created prior to Winter '17

Mobile app available for an extra cost in: **Professional** and **Enterprise** Editions for orgs created prior to May 1, 2016

Mobile app not available for orgs created in Winter '17 or later

3. Select Salesforce Mobile Classic from the search results.
4. Select **Download**.
5. Tap **Accept and Download** if you agree to the terms.
6. Select **Open** to launch the application.
7. The first time you launch the Salesforce Mobile Classic app on your device, you must activate the app for your device by logging in and downloading data. Verify that your phone is connected to a network.
 - a. Select **I Accept**.
 - b. On the activation screen, enter your Salesforce username and password.
 - c. Select **Activate**.

If your organization's setup requires a passcode, set up your passcode before you access the app.

iPhone Installation

Salesforce Mobile Classic is available for download from Apple's App Store. To use the App Store, your iPhone or iPod touch must be connected to the network. You also need an iTunes™ Store account to download applications. If you don't already have an iTunes Store account, open iTunes on your computer and select **Store > Account** to set one up.

To install Salesforce Mobile Classic from [the App Store](#):

1. From the Home screen of your iPhone or iPod touch, select the App Store icon.
2. Tap **Search**.
3. Tap within the *Search* field to open the keyboard. Type *salesforce*.
4. Select Salesforce Mobile Classic in the list of search results to view information about the application.
5. Tap **Free**, and then tap **Install**.



Note: There's no charge to download the app from the App Store. But only users in Enterprise, Professional, Unlimited, Performance, or Developer Editions who've been assigned a mobile license can run Salesforce Mobile Classic.

6. Enter your iTunes Store account and password and tap **OK**.
7. The first time you launch Salesforce Mobile Classic, you must activate the app for your device by logging in and downloading data. Verify that your device is connected to a network.
 - a. Tap the Salesforce icon on the Home screen.
 - b. Tap **I Accept**.
 - c. On the activation screen, enter your Salesforce username and password.
 - d. Tap **Activate**.



Warning: If the application closes or the device locks during the activation process, the iPhone operating system pauses the download process but it will resume the next time you open the app.

If your organization's setup requires a passcode, set up your passcode before you access the app.

Contact Salesforce

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

INDEX

508 compliance [26, 28, 35, 37–38](#)

A

Accessibility

- accessibility mode [35](#)
- accessibility mode in Salesforce [35](#)
- keyboard shortcuts [38, 41](#)
- known issues for screen readers in Lightning Experience [34](#)
- overview [26, 42](#)
- page layout [30](#)
- plug-ins [46](#)
- recommendations [28, 35, 37–38](#)
- screen reader [28, 30, 32, 34](#)
- tips [28](#)
- tips for Lightning Experience UI [32](#)

Accounts

- adding translated company names [126](#)
- changing ownership [120](#)

Allocations

- general features and editions [6](#)

app [2](#)

Apps

- App Launcher [50](#)
- opening [50–51](#)

Assistant

- Lightning Experience
 - [96](#)
- assistant [96](#)

Attachments

- fields [136](#)

authenticator [73–74](#)

B

backup [73](#)

backup accounts [73](#)

Browsers

- Firefox settings [18](#)
- Internet Explorer settings [17](#)
- limited support [15–16, 19–21](#)
- recommendations [15–16, 19–21](#)
- requirements [15–16, 19–21](#)
- settings [15–16, 19–21](#)
- supported versions [15–16, 19–21](#)

C

Calendar

- Home tab [94](#)

Campaigns

- changing ownership [120](#)
- filtering list views by [102](#)

Cases

- changing ownership [120](#)

Change password [46](#)

Chatter

- contact information [87](#)
- following people [92, 94](#)
- following records [93](#)
- searching [62](#)
- upload photos [92](#)

Chatter profile

- setting up [62](#)

Cloud [2](#)

Cloud Computing [2](#)

Collapsible Sidebar

- Hiding [65](#)
- Showing [65](#)

Contact

- information, Chatter [87](#)

Contacts

- adding translated contact names [126](#)
- changing ownership [120](#)

Creating

- custom views [102, 104](#)
- list view charts [106](#)
- records [115](#)

Custom objects

- changing ownership [120](#)

Custom views

- creating and saving [102, 104](#)
- deleting [108](#)
- editing [106–107](#)
- field filters [130](#)
- special picklist values [130](#)

D

Dashboards

- overview [135](#)
- viewing [135](#)

Index

- Deleting
 - list views [108](#)
- Detail pages
 - customizing [87](#)
- Device
 - lost device [68, 79](#)
 - lost phone [68, 79](#)
 - unrecognized browser or application [68](#)
- Divisions
 - changing selectable division [113](#)
 - working division [113](#)
- Documentation
 - implementation guides [43](#)
 - printable [43](#)
 - tip sheets [43](#)
 - user guides [43](#)
- Downloading
 - Salesforce app [141](#)
 - Salesforce Authenticator mobile app [71](#)

E

- Editing
 - email settings [86](#)
 - personal information [85](#)
- Editions
 - definition [4–5](#)
- Email
 - editing user settings [86](#)
 - settings [86](#)
- Email encoding
 - settings, editing [86](#)

F

- FAQ
 - supported languages [21](#)
- Feeds
 - following people [92, 94](#)
 - following records [93](#)
- fields
 - editing inline [116–117](#)
- Fields
 - notes [136](#)
- fields help topics [114, 116](#)
- Forgot password [46](#)
- Forgot password [46](#)

G

- Getting started
 - implementation guides [43](#)

- Getting started (*continued*)
 - new user [44, 113](#)
 - supported languages [21](#)
 - tip sheets [43](#)
 - user guides [43](#)

H

- Home tab
 - calendar section [94](#)
 - create new drop-down list [116](#)
 - customizing [113](#)
 - My Tasks section [94](#)
 - Recycle Bin [63](#)
- How To videos [43](#)

I

- Identity Verification [68, 79](#)
- Implementation guides [43](#)
- Installing
 - Salesforce app [141](#)
 - Salesforce Authenticator mobile app [71](#)

K

- Kanban
 - Configure [111](#)
 - considerations [112](#)
- Keyboard shortcuts
 - in Lightning Experience [40](#)
 - in Salesforce Classic [39](#)

L

- Language
 - settings, editing [86](#)
- Leads
 - adding translated names [126](#)
 - changing ownership [120](#)
- Learn Salesforce Basics [1](#)
- Lightning Experience
 - browser support [16](#)
 - requirements [16](#)
 - supported browsers [16](#)
- Limits
 - maps [14](#)
 - storage allocation [12](#)
- List view charts
 - viewing [101](#)
- list views
 - editing records from [116–117](#)

- List views
 - deleting 108
 - Kanban 110–112
 - list view charts 101, 106
 - printing 101
 - See Custom views 102, 104, 106–107

- List Views
 - sorting 100

- Locale
 - settings, editing 86

- Locale settings 118

- Log in
 - custom domain 79
 - first time 45
 - forgot password 79
 - forgot username 79
 - locked out 79
 - login error 79
 - login hint 45
 - lost password 79
 - lost username 79
 - reset password 79
 - username hint 45
 - username locked out 79

- Login 79

- Lost password 46

M

- Maps
 - limits 14

- My Settings
 - navigating to, Lightning Experience 85
 - navigating to, Salesforce Classic 84
 - Quick Find, Lightning Experience 85
 - Quick Find, Salesforce Classic 84

N

- Notes
 - fields 136

O

- object 2
- Opportunities
 - changing ownership 120
- Ownership
 - changing record owners 120
 - transfer of associated items 121

P

- Pages
 - detail 49
- Passwords
 - change 46
 - changing by user 78
 - forgot 80
 - identity confirmation 78
 - login verification 78
 - reset 80
 - two-factor authentication 78

- People
 - following 92, 94

- Performance chart
 - Lightning Experience 95
 - performance chart 95

- Personal Settings
 - navigating to, Lightning Experience 85
 - navigating to, Salesforce Classic 84
 - Quick Find, Lightning Experience 85
 - Quick Find, Salesforce Classic 84

- Phone
 - lost device 68, 79
 - lost phone 68, 79

Q

- Quick Create
 - creating records 115

R

- Recent items 110
- record 2
- records
 - creating 114
 - creating from object tabs 114
 - creating in feeds 115
 - creating with Quick Create 115
 - deleting 118
 - editing 116
 - editing inline 116–117
 - required fields 114, 116

- Records
 - creating 115
 - finding 98–99
 - following 93
 - printing 119
 - sorting lists 100
 - viewing 98–99

- recover [74](#)
- Recycle Bin [63](#)
- related lists [109](#)
- Reports
 - field filters [130](#)
 - running [128](#)
 - sorting results [129](#)
 - special picklist values [130](#)
- Reset password [46, 80](#)
- Resources [42](#)
- restore [74](#)

S

- Salesforce [2](#)
- Salesforce administrator
 - can't see features [65](#)
- Salesforce app
 - using [26](#)
- Salesforce apps
 - overview [140](#)
- Salesforce authenticator [73](#)
- Salesforce Authenticator mobile app
 - access [71](#)
 - accessibility [72](#)
 - automated verifications [77](#)
 - turn off automated verifications [77](#)
 - connect account [73](#)
 - install [71](#)
 - locale and language support [72](#)
 - overview [69](#)
 - remove account [75](#)
 - requirements [71](#)
 - trusted locations [77](#)
 - stop trusting [77](#)
 - two-factor authentication [76–77](#)
 - verify account activity [76–77](#)
- Salesforce How To videos [43](#)
- Salesforce mobile app
 - accessing [141](#)
 - can't log in [150](#)
 - Disable [151](#)
 - feature comparison [142](#)
 - installing [141](#)
 - Redirection to the mobile browser app [151](#)
 - requirements [147](#)
 - resources [152](#)
 - Supported data [149](#)

- Salesforce mobile app (*continued*)
 - using [42, 152](#)
- Salesforce Mobile Classic
 - installing [154](#)
- Salesforce videos [43](#)
- Search
 - records [54, 57](#)
- Searching
 - Chatter [62](#)
- Security
 - identity verification [15, 68](#)
- Security question
 - resetting by user [46](#)
- Security token
 - reset [81–82](#)
- Setup
 - navigating to [63](#)
 - personal information [85](#)
 - Quick Find [63](#)
 - user [83, 94, 97, 127](#)
- Software as a Service [2](#)
- Storage
 - allocation limits [12](#)
- Support
 - grant login access [82](#)

T

- tabs
 - adding [86](#)
- Tabs
 - customizing [88–91](#)
 - Home tab [47](#)
 - object tabs [48](#)
 - viewing all [47](#)
- Tags
 - deleting tags [126](#)
 - removing from records [126](#)
 - tag limits [126](#)
 - tagging records [126](#)
- Task bar [116](#)
- Temporary Verification Code
 - verify identity [79](#)
- Time zone
 - settings, editing [86](#)
- Tip sheets [43](#)
- tips for new users [67](#)
- Topics
 - add to records [124](#)
 - on records [123](#)

Index

Topics (*continued*)
 remove from records [125](#)
Trust [2](#)
two-factor authentication [74](#)
Two-Factor Authentication [79](#)

U

User guides [43](#)
User setup
 change password [68](#)
 change passwords [46](#)
 changing passwords [78](#)
 customizing pages [87](#)
 customizing tabs [88, 90–91](#)
 editing [85](#)
 email settings [86](#)
 grant login access [82](#)
 password expired [46](#)
 personalizing tabs [89](#)
 reset security token [81–82](#)
 resetting security question [46](#)

User setup (*continued*)
 verify identity [68](#)
 verifying identity [78](#)

User Setup
 verify identity [79](#)

Users
 changing selectable division [113](#)
 See also User setup [85](#)

V

Value formatting
 currency [118](#)
 dates [118](#)
 phone numbers [118](#)
 times [118](#)

Views
 See Custom views [102, 104, 106–107](#)

W

Walkthrough [43](#)
Web Content Accessibility Guidelines (WCAG) [26, 28, 35, 37–38](#)