



Sales Cloud Basics

Salesforce, Spring '18



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SALES CLOUD BASICS

The Sales Cloud provides everything you need to manage your business. Generate the best leads, manage opportunities through the sales pipeline, and cultivate relationships with existing accounts. Plus, forecast revenues, set up sales territories, and organize your reps into selling teams.

[Campaign and Bring in Leads](#)

Use leads to track prospects as you build your pipeline. Create campaigns to market directly to your leads so you can turn prospects into deals.

[Turn Opportunities into Deals](#)

Move opportunities through the sales process, and track exactly what you're selling and for how much.

[Manage Accounts and Contacts](#)

Track the people and companies you do business with. Store information, collaborate on accounts, access the records you need.

[Manage a Sales Team](#)

Set up sales territories and organize your reps into selling teams. Plus, forecast sales revenues based on your opportunity pipeline.

[More Sales Features](#)

Locate documentation for earlier versions of features we've upgraded.

[Resources for the Sales Professional](#)

In addition to online help, Salesforce creates guides and tip sheets to help you learn about our features and successfully administer Salesforce.

Campaign and Bring in Leads

Use leads to track prospects as you build your pipeline. Create campaigns to market directly to your leads so you can turn prospects into deals.

[Campaigns](#)

Manage outbound marketing campaigns with direct mail programs, seminars, print ads, email, and other kinds of marketing collateral. Organize campaigns into hierarchies for easy analysis to see what works best for increasing your company's sales. Salesforce makes it easy for you to quickly locate, manage, and report on campaigns.

[Campaign Influence](#)

Understand how your campaigns are affecting your opportunity pipeline.

[Leads](#)

Track prospects apart from your contacts and opportunities with Salesforce lead records. After you've qualified your lead records, convert them to contacts and create accounts for them (if you don't already have the accounts in Salesforce). And hopefully, create opportunities to bolster your pipeline.

Campaigns

Manage outbound marketing campaigns with direct mail programs, seminars, print ads, email, and other kinds of marketing collateral. Organize campaigns into hierarchies for easy analysis to see what works best for increasing your company's sales. Salesforce makes it easy for you to quickly locate, manage, and report on campaigns.

[Set Up Campaigns](#)

Configure campaigns to make them work for your marketing department.

[Manage Campaigns](#)

Monitor and update your campaigns to maximize their effectiveness.

[Manage Campaign Members](#)

Add members to campaigns and update member statuses to keep your campaigns humming.

[Things to Know About Campaigns](#)

Review these considerations before you work with campaigns. Learn more about campaigns, campaign members, and their fields.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Set Up Campaigns

Configure campaigns to make them work for your marketing department.

[Customize Campaign Member Statuses](#)

For each of your campaigns, you can define separate Campaign Member Status values to track the stages members go through during the campaign. For example, in a conference campaign, you might use values of *invited*, *registered*, and *attended*.

[Set Up Campaign Hierarchies](#)

Analyze and report on the health of your related campaigns. By associating campaigns with one another using a lookup relationship, you can group campaigns within a specific marketing program or initiative.

[Configure Campaign Engagement History \(Beta\)](#)

When Pardot and Salesforce campaigns are connected, users can see in Salesforce exactly how much activity their campaigns are generating. Add the Engagement Metrics component, engagement history fields, and report charts to campaign page layouts to show marketers how much activity their emails and forms are generating. Add the Engagement History related list to leads and contacts to see how they have engaged.

Customize Campaign Member Statuses

For each of your campaigns, you can define separate Campaign Member Status values to track the stages members go through during the campaign. For example, in a conference campaign, you might use values of *invited*, *registered*, and *attended*.

[Customize Campaign Member Statuses in Lightning Experience](#)

For each campaign, you can set up member status values to suit the campaign type.

[Customize Campaign Member Statuses in Salesforce Classic](#)

Define the statuses members can have in each of your campaigns.


Customize Campaign Member Statuses in Lightning Experience

For each campaign, you can set up member status values to suit the campaign type.

To see the Campaign Member Statuses related list, your admin must add it to campaign page layouts.

1. To add a status, click **New** in the Campaign Member Statuses related list.
2. To change which status is the default, click **Change Default Status**.
3. To change a status name, click **Edit** next to the status.
4. To change whether the status counts as responded, click **Edit** next to the status.

Members with statuses that count as “Responded” are tallied in the `Responses in Campaign` field on the campaign.

 **Note:** Modifying the Responded checkbox has broad effects. When you select or deselect the Responded checkbox, campaign statistics and campaign member details change accordingly. Specifically, the fields `Responded`, `Last Responded Date`, and `Last Modified` change on the campaign member record. For example, if you select the `Responded` checkbox for a status called “Attended”, campaign members whose status is “Attended” are counted as responses in campaign statistics and the date fields are updated.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view campaigns:

- Read on campaigns

To customize member status values:

- Edit on campaigns

AND

Marketing User checked in your user information

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view campaigns:

- Read on campaigns

To customize member status values:

- Edit on campaigns

AND

Marketing User checked in your user information


Customize Campaign Member Statuses in Salesforce Classic

Define the statuses members can have in each of your campaigns.

Defining Member Status Values

New campaigns have two default member status values: "Sent" and "Responded". You can edit the values and create more according to how you want to track campaign members.

1. Click **Advanced Setup** on a campaign detail page.
2. Click **Edit**.
3. Update the existing entries or add new values.
4. To add entries, click **Add More**. You can add up to 50 entries.
5. Select one entry as the "Default" value.
6. Choose which values count as "Responded." Members with statuses that count as "Responded" are tallied in the `Responses in Campaign` field on the campaign.

 **Note:** Modifying the Responded checkbox has broad effects. When you select or deselect the Responded checkbox, campaign statistics and campaign member details change accordingly. Specifically, the fields `Responded`, `Last Responded Date`, and `Last Modified` change on the campaign member record. For example, if you select the Responded checkbox for a status called "Attended", campaign members whose status is "Attended" are counted as responses in campaign statistics and the date fields are updated.

Replacing Member Status Values

You can globally replace the `Member Status` values for each campaign member. For example, you decide that "Attended" is a more appropriate value than "Showed Up."

1. Click **Advanced Setup** on a campaign detail page.
2. Click **Replace** in the Member Status Values related list.
3. Enter the value you want to change, and select the new value.
4. Click **Save**.

 **Note:** If you replace member status values, all campaign records are updated regardless of your sharing access to the related contacts or leads. Replacing the campaign member status doesn't recalculate roll-up summary fields or fire workflows, triggers, or validation rules.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view campaigns:

- Read on campaigns

To customize member status values:

- Edit on campaigns

AND

Marketing User checked in your user information


Set Up Campaign Hierarchies

Analyze and report on the health of your related campaigns. By associating campaigns with one another using a lookup relationship, you can group campaigns within a specific marketing program or initiative.

Hierarchies contain up to five levels. Each campaign can have one parent campaign, but an unlimited number of sibling campaigns.

To set up campaign hierarchies, add the `Parent Campaign` field to your campaign page layout and enable the campaign hierarchy statistics fields.

Use field-level security to make the fields visible. As you make each field visible, Salesforce displays the field's value in the **Hierarchy Total** section of the Campaign Hierarchy related list.

 **Note:** The campaign hierarchy fields provide aggregate data for a parent campaign and all the campaigns below it in the campaign hierarchy, regardless of whether a user has sharing rights to a particular campaign within the campaign hierarchy. Therefore, consider your organization's campaign sharing settings when enabling campaign hierarchy fields. If you do not want users to see aggregate hierarchy data that includes campaigns to which the users do not have access, you can choose to remove any or all of the campaign hierarchy fields from the Campaign Hierarchy related list. If you do not add the campaign hierarchy fields to the related list or page layout, you can still access these fields on reports.


Once campaign hierarchies are set up, users can create and assign parent campaigns using `Parent Campaign` and then view details about the hierarchy on the Campaign Hierarchy page or the Campaign Hierarchy related list.

 **Note:** All campaigns within a hierarchy must use the same currency.

The Campaign Hierarchy page, accessible from the **[view hierarchy]** link next to the **Campaign Name** on the campaign record, shows all the levels in a hierarchy and the campaigns included in each level. For more information, see [View Campaign Hierarchies](#) on page 16. The Campaign Hierarchy related list provides aggregate data for the parent campaign and all the campaigns below it in the hierarchy. For more information see [View Campaign Hierarchy Statistics](#) on page 16.

Connect Pardot Campaigns to Salesforce Campaigns (Beta)

If your company uses both Pardot and Salesforce, you can work with one set of campaign records by connecting your Pardot campaigns to Salesforce campaigns. When campaigns are connected, marketers can track campaign influence and view engagement history all on the same record in Salesforce.

 **Note:** As a beta feature, this feature is in preview and is not considered part of the "Services" under your master subscription agreement with Salesforce. Salesforce does not guarantee general availability of this beta feature within any particular time frame or at all. Use of this beta in your sole discretion and is for evaluation purposes only and not for production use. This beta feature is offered as-is, is not supported, and Salesforce will have no liability for any harm or damage arising out of or in connection with this beta feature. All restrictions, Salesforce reservation of rights and Customer obligations concerning the Services, and use of any related Non-SFDC Applications and Content, shall apply equally to Customer's use of this beta feature. Salesforce may discontinue this beta feature at any time in our sole discretion. You should make your purchase decisions only on the basis of generally available products and features.

To support Pardot features available within Sales Cloud, Salesforce added a user called B2BMA Integration User to all Salesforce customers who also have Pardot. This new user is read-only,

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create a campaign hierarchy:

- Create on campaigns AND Marketing User enabled in your user detail page

To set up campaign hierarchies:

- Customize Application

EDITIONS

Available in: **Enterprise, Performance, and Unlimited** Editions with Pardot Standard, Pardot Pro, or Pardot Ultimate Edition

doesn't affect your Salesforce license usage, and doesn't access or update any data by default. If you choose to opt-in to the optional new Pardot features available in Sales Cloud, then this user enables engagement history and other campaign data to flow between your Pardot org and your Salesforce org. This can include copying records from Pardot to Salesforce and vice-versa.

This feature is included in the Spring '18 release, but is not available until April 2, 2018. Ask your Salesforce account executive to enable this feature if it is not provisioned for your org by that date.

When your administrator enables Connected Campaigns in Pardot, you can begin connecting your Pardot campaign records to Salesforce campaign records. Then, whether you work in Salesforce or Pardot, you're working with the same data.

Considerations

Before enabling B2B Marketing and connecting campaigns, keep these considerations in mind.

- To work with connected campaigns, Pardot users need a Salesforce login.
- When you enable Connected Campaigns, only campaigns you connect can be used in Pardot. When you connect a campaign, the Pardot campaign record becomes read-only. Campaigns can't be created from Pardot. Create campaigns from the Salesforce Campaigns tab.
- Only Salesforce campaigns that use the records types you select in Pardot Account Settings connect to Pardot campaigns. Depending on how your company uses record types, you can choose not to connect some record types.
- Connecting campaigns makes Customizable Campaign Influence available to Pardot campaigns, letting you track the opportunities they generate.
- For connected campaigns, Pardot engagement history data becomes available in Salesforce. Your admin can add engagement history fields to the page layouts for connected campaign record types.
- Salesforce copies associated marketing forms, marketing links, and list emails from Pardot campaigns to their connected Salesforce campaigns. This data counts against your company's data storage limits.
- You can connect multiple Pardot orgs to a single Salesforce org, as long as you enable different campaign record types for Connected Campaigns in each Pardot org.
- When a Salesforce campaign connects to a Pardot campaign, it replaces the values of some Pardot campaign fields.
 - Name
 - Archive Date
 - Cost
 - Created By
 - Updated By
 - Updated At

 **Note:** This action can't be undone.

Enable Connected Campaigns

To enable Connected Campaigns

1. From Pardot, go to Settings.
2. Click **Edit**.
3. Scroll down and click **Connect Campaigns**.
4. Select the Salesforce campaign record types you want to let marketers connect to Salesforce campaigns. The master record type is the default record type included with Salesforce.

5. Click **Save Account**.
6. Click **Enable Connected Campaigns**.
7. Click **Save Account** again.

When you enable Connected Campaigns, Pardot campaign records can only be used to manage campaign membership. Users perform all other campaign tasks on the connected Salesforce campaign records.

When your marketing team finishes connecting their campaigns, return to the Settings page to complete the alignment process.

1. Click **Use Salesforce to manage campaigns**. This setting removes the Connect to CRM Campaign action from the Pardot Campaigns page.
2. To let Pardot users see any unconnected campaigns, click **Show Unconnected Campaigns**. This setting only applies when you enable **Use Salesforce to manage all campaigns**.

Connect Pardot and Salesforce Campaigns

When you are ready, connect campaigns one at a time or in bulk.

The screenshot shows the 'Pardot Campaigns' page. At the top, there's a section titled 'Connect Campaigns with Excel' with two buttons: 'Download Mapping Workbook' (labeled 3) and 'Upload Completed Workbook' (labeled 4). Below this is the 'Unconnected Campaigns' section, which has a 'View:' dropdown set to 'Unconnected Campaigns' (labeled 1) and a 'Filter:' field. A table lists several campaigns: 'Webinar Campaign', 'Email Campaign', 'Web Form Campaign', and 'Billboard Campaign'. The 'Webinar Campaign' row has a 'Connect to CRM Campaign' button (labeled 2) in the 'ACTIONS' column. The table columns are: NAME, VISITORS, PROSPECTS, UPDATED, and ACTIONS.

NAME	VISITORS	PROSPECTS	UPDATED	ACTIONS
Webinar Campaign	1	0	Oct 26, 2017 4:59 PM	Connect to CRM Campaign
Email Campaign	0	0	Oct 13, 2017 5:42 PM	Delete
Web Form Campaign	0	4	Oct 13, 2017 5:42 PM	Delete
Billboard Campaign	0	0	Oct 11, 2017 5:42 PM	Delete

To connect an individual campaign, from the Campaigns page in Pardot, choose the **Unconnected Campaigns** view (1). Click the **Connect to CRM Campaign** action (2) for the campaign you want to connect and then select a Salesforce campaign to connect.

To connect campaigns in bulk, click **Download Mapping Workbook** (3). Salesforce exports an Excel spreadsheet with separate tabs listing your Pardot and Salesforce campaigns. Use the Connect Campaigns tab in the spreadsheet to create a connection list. When you are finished, click **Upload Completed Workbook** (4) and upload your completed spreadsheet.


To connect a new Salesforce campaign to a new Pardot campaign, marketers can simply create a Salesforce campaign. Salesforce creates and connects a Pardot campaign automatically.

SEE ALSO:

- [Configure Campaign Engagement History \(Beta\)](#)
- [Connect Pardot Campaigns to Salesforce in Bulk \(Beta\)](#)

Connect Pardot Campaigns to Salesforce in Bulk (Beta)

To connect many Pardot campaigns to existing Salesforce campaigns, use the Excel spreadsheet Salesforce provides.

 **Note:** As a beta feature, this feature is in preview and is not considered part of the “Services” under your master subscription agreement with Salesforce. Salesforce does not guarantee general availability of this beta feature within any particular time frame or at all. Use of this beta in your sole discretion and is for evaluation purposes only and not for production use. This beta feature is offered as-is, is not supported, and Salesforce will have no liability for any harm or damage arising out of or in connection with this beta feature. All restrictions, Salesforce reservation of rights and Customer obligations concerning the Services, and use of any related Non-SFDC Applications and Content, shall apply equally to Customer’s use of this beta feature. Salesforce may discontinue this beta feature at any time in our sole discretion. You should make your purchase decisions only on the basis of generally available products and features.


1. From the B2B Marketing app, click the **Pardot Campaigns** tab.
2. Click **Download Mapping Workbook**.
Salesforce exports an Excel spreadsheet with separate tabs listing your Pardot and Salesforce campaigns.
3. To create a campaign connection list, use the Connect Campaigns tab of the spreadsheet.
4. When you are finished, click **Upload Completed Workbook** and upload your completed spreadsheet.

SEE ALSO:

[Connect Pardot Campaigns to Salesforce Campaigns \(Beta\)](#)

Configure Campaign Engagement History (Beta)

When Pardot and Salesforce campaigns are connected, users can see in Salesforce exactly how much activity their campaigns are generating. Add the Engagement Metrics component, engagement history fields, and report charts to campaign page layouts to show marketers how much activity their emails and forms are generating. Add the Engagement History related list to leads and contacts to see how they have engaged.

 **Note:** As a beta feature, this feature is in preview and is not considered part of the “Services” under your master subscription agreement with Salesforce. Salesforce does not guarantee general availability of this beta feature within any particular time frame or at all. Use of this beta in your sole discretion and is for evaluation purposes only and not for production use. This beta feature is offered as-is, is not supported, and Salesforce will have no liability for any harm or damage arising out of or in connection with this beta feature. All restrictions, Salesforce reservation of rights and Customer obligations concerning the Services, and use of any related Non-SFDC Applications and Content, shall apply equally to Customer’s use of this beta feature. Salesforce may discontinue this beta feature at any time in our sole discretion. You should make your purchase decisions only on the basis of generally available products and features.

To support Pardot features available within Sales Cloud, Salesforce added a user called B2BMA Integration User to all Salesforce customers who also have Pardot. This new user is read-only, doesn’t affect your Salesforce license usage, and doesn’t access or update any data by default. If you choose to opt-in to the optional new Pardot features available in Sales Cloud, then this

EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Pardot Standard, Pardot Pro, or Pardot Ultimate Edition

USER PERMISSIONS

To connect Pardot Campaigns to Salesforce Campaigns

- General Account Administration

AND

Marketing User checked in your user information

AND

the B2B Marketing Automation App permission set license

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions with Pardot Standard, Pardot Pro, or Pardot Ultimate Edition

user enables engagement history and other campaign data to flow between your Pardot org and your Salesforce org. This can include copying records from Pardot to Salesforce and vice-versa.

This feature is included in the Spring '18 release, but is not available until April 2, 2018. Ask your Salesforce account executive to enable this feature if it is not provisioned for your org by that date.

On Salesforce campaigns that are connected to Pardot campaigns, engagement history data flows from Pardot to the Salesforce campaign record and related marketing assets. Engagement history includes every new activity on marketing assets associated with connected campaigns by known prospects that are syncing with Salesforce. Known prospects are Pardot prospects that have provided their name, and possibly other personal information.

These marketing assets are supported:

- List emails, including emails sent from Pardot
- Marketing forms, including both forms and form handlers in Pardot
- Marketing links, including custom redirects in Pardot

In Salesforce, new ListEmail, MarketingForm, and MarketingLink objects store records for these assets, which are copied from the corresponding Pardot records. These records count against your org's data storage limits. These objects are accessible only in reports.

To see Pardot engagement data on your Salesforce campaigns, there are some requirements.

- The Pardot campaign must be connected to a Salesforce campaign.
- The prospect engaging with a marketing asset must provide enough information to identify them, such as their name and address or phone number.
- The prospect must be syncing with a Salesforce lead or contact. Syncing happens when the Pardot and Salesforce campaigns are connected, the Pardot prospect is identified, and the matching Salesforce lead or contact is a member of the connected Salesforce campaign.
- The prospect must be assigned to a user, group, or queue in Salesforce. A good way to assign prospects is with an automation rule. For more information, see [Assigning Prospects](#).
- To access engagement history data, users need the Sales User or CRM User standard permission set and field-level security access to the engagement history fields.

Several fields become available to Salesforce campaigns and can be added to your page layouts for campaigns. Field-level security for each is initially set to not visible. Only include engagement fields on campaign record types enabled for Connected Campaigns. Each field updates daily.

- **List emails, including emails sent from Pardot:**

- Unique Email Opens in Campaign
- Unique Email Opens in Hierarchy
- Unique Email Clicks in Campaign
- Unique Email Clicks in Hierarchy
- Total Emails Delivered in Campaign
- Total Emails Delivered in Hierarchy

- **Forms and form handlers:**

- Total Form Submissions in Campaign
- Total Form Submissions in Hierarchy
- Total Form Views in Campaign
- Total Form Views in Hierarchy

- **Custom redirects and marketing links:**

- Unique Marketing Link Clicks in Campaign
- Unique Marketing Link Clicks in Hierarchy

Depending on the data users want to see, you can add the engagement history fields to campaign page layouts individually.

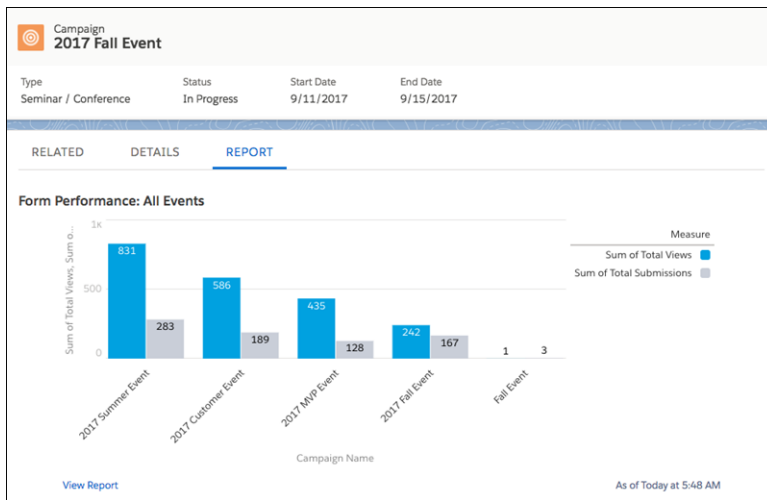
In Lightning Experience, you can add the Engagement Metrics component to campaigns to see them all together. The component displays three more fields.

- Email Open Rate
- Email Click-Through Rate
- Form Submission Rate

When you add the Engagement Metrics component, marketers can view statistics for just the campaign or for the campaign hierarchy. Add engagement fields to campaign list views to let users easily find campaigns with engagement.

	CAMPAIGN NAME ↑	TOTAL FORM SUBMISSIO...	TOTAL FORM VIEWS IN CA...	TOTAL FORM SUBMISSIO...	TOTAL FORM VIEWS IN HI...
1	AdWords: Expense Management	0	0	0	0
2	Best Practices Webinar	0	0	0	0
3	Blogs	0	0	0	0
4	Cold Leads Re-engagement Nurture	0	0	0	0
5	Competitive Deal Nurture	0	0	0	0
6	Corporate Website	1,099	10,274	1,099	10,274
7	Dreamforce	43	432	43	432
8	Dreamforce 2017 Campaign	0	0	0	0
9	Dreamforce Campaign!	0	0	0	0
10	Education Nurture	0	0	0	0
11	Email Plug-in	0	0	0	0
12	Facebook (Pardot)	0	0	0	0
13	Facebook Webinar Follow-Up Nurture	0	0	0	0
14	LinkedIn	0	0	0	0
15	My Dreamforce Campaign	0	0	0	0
16	Newly Created	0	0	0	0

Marketers can use native Salesforce reporting to build reports that include campaigns, Pardot marketing assets, and the engagement totals on those assets. Using Lightning App Builder, you can include report charts on Lightning Experience campaign page layouts to let users view the engagement data that's important to them.



To let users see individual lead and contact engagement in Lightning Experience, add the Engagement History related list to lead and contact detail pages. The Engagement History related list updates when the activity occurs, so users get a real-time view of engagement.

The screenshot shows a Salesforce contact detail page for Corina Mauro. The page includes fields for Title (EVP Business Development), Account Name (Displaytech), Phone ((709) 555-2582), and Email (cmauro@example.com). Below the details is a related list titled 'Engagement History (6+)' with columns for Marketing Asset, Activity Type, and Activity Date. The list contains seven entries, all dated 9/12/2017 at 5:30 PM.

MARKETING ASSET	ACTIVITY TYPE	ACTIVITY DATE
Demo Request	Form Submit Success	9/12/2017 5:30 PM
Demo Request	Form View	9/12/2017 5:30 PM
Webinar Registration	Form Submit Success	9/12/2017 5:30 PM
Webinar Registration	Form View	9/12/2017 5:30 PM
Event Registration	Form Submit Success	9/12/2017 5:29 PM
Event Registration	Form View	9/12/2017 5:29 PM

The Engagement History related list is separate from the Engagement History *component* available in the Pardot managed package on the AppExchange. The related list displays native Salesforce engagement data for marketing forms, list emails, and marketing links. The available component displays engagement data queried from Pardot for all marketing asset types.

SEE ALSO:

[Connect Pardot Campaigns to Salesforce Campaigns \(Beta\)](#)

Manage Campaigns

Monitor and update your campaigns to maximize their effectiveness.

[Campaigns Home](#)

[Lifecycle of Campaigns](#)

Make your marketing programs and post-campaign analysis more effective.

[Campaign History](#)

Track changes to standard and custom fields on campaigns with the Campaign Field History related list.

[Display and Edit Campaigns](#)

[View Campaign Hierarchies](#)

[View Campaign Hierarchy Statistics](#)

[Sharing Campaigns](#)

[Campaigns and Distributed Marketing](#)

Distributed Marketing from Salesforce bridges the gap between corporate marketing, employees, channel partners, and your brand to deliver consistent experiences across corporate marketing and partner networks. Corporate marketers build on-brand, cross-channel journeys in Marketing Cloud and deploy them to advisors, owners, and partners. These individuals then add their contacts to the journeys and personalize messages for each contact.

Campaigns Home

Clicking on the Campaigns tab displays the campaigns home page. Any user can access the campaigns home page.

- To show a filtered list of items, select a predefined list from the `view` drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the `view` drop-down list and click **Edit**.
- In the **Recent Campaigns** section, select an item from the drop-down list to display a brief list of the top campaigns matching that criteria. From the list, you can click any campaign name to go directly to the campaign detail. Toggle the **Show 25 items** and **Show 10 items** links to change the number of items that display. The fields you see are determined by the "Campaigns Tab" search layout defined by your administrator and by your field-level security settings (available in Professional, Enterprise, Unlimited, Performance, and Developer Editions). The Recent Campaigns choices are:

Recent Campaigns Choice	Description
Recently Viewed	The last ten or twenty-five campaigns you viewed, with the most recently viewed campaign listed first. This list is derived from your recent items and includes records owned by you and other users.
My Active Campaigns	The most recent ten or twenty-five campaigns marked as Active, with the most recently

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view Campaigns tab:

- Read on campaigns

To view campaigns:

- Read on campaigns

To create campaigns:

- Create on campaigns

Recent Campaigns Choice	Description
	created campaign listed first. This list only includes records owned by you.

- In the **Recent Campaigns** section, click **New** to create a new campaign.
- Under **Reports**, click any report name to jump to that report.

Lifecycle of Campaigns

Make your marketing programs and post-campaign analysis more effective.

See the [Campaign Management Implementation Guide](#) for additional information.

1. Create the campaign.

After determining your marketing strategy, create a campaign to track your efforts.

2. Create your target list.

Define who you want to target with your campaign. The method used to create a target list depends on who you're targeting.

- **Rented or Purchased Lists:** Use the list of names as your target list. We recommend that you do not import the names into the system yet.
- **Existing Contacts, Leads, or Person Account:** Run a contact, lead, or person account report in Salesforce. Then use the **Add to Campaign** button to associate those records with your campaign. Or, go to a list view of contacts or leads and use the **Add to Campaign** button to associate those records with your campaign. Person accounts are included in contact list views. See [Campaign Member Task Overview](#) on page 33.

3. Execute the campaign.

All campaign execution occurs outside of Salesforce—either online or offline.

- **Online:** Send email using an email execution vendor.
- **Offline:** Plan and host a conference, run print or radio advertisements, send direct mail pieces, or host a Web seminar.

4. Track responses.

Campaign responses can be divided into these groups based on the response tracking mechanism.

- **Website Response:** Prospects respond by completing a form on your website. Use Web-to-Lead to set up a jump page or microsite for the campaign. All responses are created as leads, and if the Web form includes the `Campaign` field value, the leads are directly associated to the campaign. You can also include the `Member Status` field in the form to automatically mark all submissions with a particular member status.
- **Manual Update:** Customers and prospects respond via phone or mail. A sales or marketing team member can manually update the Campaign History for the lead, contact, or person account.
- **Mass Update/Offline Response:** This includes any response that you track in an offline list, for example, trade show attendance or email responses from your email vendor. In Salesforce, use the Manage Members page to update the member status of leads, contacts, or person account that have been associated with your campaign. See [Editing Multiple Campaign Members](#) on page

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view campaigns:

- Read on campaigns

To create campaigns:

- Create on campaigns

AND

Marketing User checked in your user information

To change campaigns:

- Edit on campaigns

AND

Marketing User checked in your user information

35. Alternatively, import the offline list into Salesforce via the Data Import Wizard. See [Add or Update Campaign Members with the Data Import Wizard](#).

5. Analyze campaign effectiveness.

Analyze the effectiveness of the campaign using reports and campaign statistics. See [Display and Edit Campaigns](#) on page 14 for information on calculating statistics.

Campaign History

Track changes to standard and custom fields on campaigns with the Campaign Field History related list.

The Campaign Field History related list of a campaign detail page tracks the changes to the campaign. Any time a user modifies any of the standard or custom fields whose history is set to be tracked on the campaign, a new entry is added to the Campaign Field History related list. All entries include the date, time, nature of the change, and who made the change. Modifications to the related lists on the campaign are not tracked in the campaign history.

Display and Edit Campaigns

Displaying Campaigns

Once you have located a campaign on the campaigns home or list pages, click the campaign name to display detailed information. You can also select a campaign name from the Campaign History related list of an associated lead, contact, or person account. If hover details are enabled, hover over any lookup field on the detail page to view key information about a record before clicking into that record's detail page.

Editing Campaigns

To update a campaign, click **Edit**, and then change the fields you want to update. When you have finished, click **Save**. You can also click **Save & New** to save the current campaign and create another.

Use inline editing to edit fields directly on the detail page. If inline editing isn't enabled, contact your administrator.

 **Note:** To edit a campaign that is a child of another campaign, you must have at least "Read" access on the parent.

Creating Campaign Hierarchies

When creating or editing a campaign you can use the `Parent Campaign` lookup field to assign a parent to your campaign. In the lookup dialog you can search for an existing campaign or create a new parent campaign. For more information on configuring campaign hierarchies for your organization, see [Set Up Campaign Hierarchies](#) on page 5.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view campaigns:

- Read on campaigns

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view campaign lists:

- Read on campaigns

To change campaigns:


- Edit on campaigns

AND

Marketing User checked in your user information

Calculating Campaign Statistics

The campaign detail includes campaign statistic fields, which are updated automatically and include values from all associated records regardless of whether you have read access to those records. If you have campaign hierarchies enabled, the Campaign Hierarchy related list contains aggregate statistics for a parent campaign and all the campaigns below it in the campaign hierarchy.

-  **Note:** The campaign statistics calculation process runs every two minutes and processes one campaign's statistics at a time. If there are a large number of campaigns or campaigns with large numbers of campaign members pending, there may be a delay of 10 minutes or more.

Linking Contacts, Leads, or Person Account to Campaigns

Select an option from the **Manage Members** drop-down button on the campaign detail page.

Advanced Setup

Click **Advanced Setup** to customize the `Member Status` values for a campaign. The `Member Status` values are the possible responses that a member can have to the campaign, for example, "Sent," "Responded," "Attended." See [Customize Campaign Member Statuses in Salesforce Classic](#) on page 4.

Campaign Related Lists

- Hover over the links at the top of a detail page to display the corresponding related list and its records. If Chatter is enabled, hover links display below the feed. An interactive overlay allows you to quickly view and manage the related list items. Click a hover link to jump to the content of the related list. If hover links are not enabled, contact your Salesforce administrator.
- The lower portion of the display provides information related to the campaign including activities, attachments, campaign members, campaign hierarchies, and the opportunities that resulted from the campaign. The related lists you see are determined by your personal customization, and by any customization your administrator has made to page layouts or your permissions to view related data. You can click individual items to display additional detail. Click **More** at the bottom of the page or **View More** below a related list to display more items.

Printing Campaigns

To view a printable display of all information for the campaign, click **Printable View** on the campaign detail page. Use your browser's Print function to print the display.

Sharing

To share a campaign with other users, groups, or roles, click **Sharing**. See [Sharing Campaigns](#) on page 17.

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

View Campaign Hierarchies

A campaign hierarchy allows you to group campaigns together within a specific marketing program or initiative, which enables you to analyze related marketing efforts more efficiently.

To view the hierarchy for a campaign, click **View Hierarchy** next to the `Campaign Name` field on the campaign detail page. If a campaign is not part of a hierarchy, its corresponding Campaign Hierarchy page shows only the campaign that you selected.

A campaign hierarchy shows campaigns that are associated with one another via the `Parent Campaign` field. A hierarchy illustrates a relationship between campaigns, such as a grouping of campaigns within a specific marketing tactic. Each campaign can have only one parent campaign but an unlimited number of sibling campaigns. A campaign hierarchy can contain a maximum of five levels or generations. In other words, a campaign hierarchy has a maximum depth of five levels but an unlimited breadth on each level. Campaign members, such as contacts and leads, can be included on any level.

On the Campaign Hierarchy page, campaigns are indented to show that they are related to the campaigns above them. Campaigns are listed in descending order based on their hierarchy level. Click any campaign name to open the detail page for that campaign.

Statistics for an individual campaign are in the Campaign Statistics section of the campaign detail page. Aggregate statistics for parent and child campaigns are in the Campaign Hierarchy related list.



Note: To ensure accurate reporting, all campaigns in a hierarchy must use the same currency.

View Campaign Hierarchy Statistics

Campaign detail pages include a Campaign Hierarchy related list, which displays a parent campaign and all the campaigns directly below the parent campaign in the campaign hierarchy. You can create a campaign hierarchy by associating campaigns with one another using the `Parent Campaign` lookup field on the campaign detail page. Click any campaign in the related list to open the detail page for that campaign.

The Campaign Hierarchy related list provides statistics fields for each campaign in the list as well as the total value for the parent campaign and all the campaigns below it in the campaign hierarchy. Statistics fields are not visible in the related list until campaign hierarchies are enabled for your organization. For more information and a list of fields, see [Set Up Campaign Hierarchies](#) on page 5.

The Campaign Hierarchy related list shows a maximum of two hierarchy levels: the parent campaign and its child campaigns. If a child campaign has children, those children do not appear in the related list but their data is included in the campaign hierarchy statistic field values. The campaign hierarchy statistic fields provide aggregate data regardless of whether you have sharing rights to view individual campaigns within the hierarchy. However, if you do not have access to a campaign that appears in the related list, you cannot view its detail page from the link on the related list. To view all the levels in a campaign hierarchy, click the **View Hierarchy** link next to the `Campaign Name` on the campaign detail page.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view campaigns:

- Read on campaigns

To view campaign hierarchies:

- Read on campaigns

AND

Read on the Parent Campaign field on campaigns

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view campaigns:

- Read on campaigns

To view campaign hierarchies:

- Read on campaigns

Sharing Campaigns

Your administrator defines your organization's sharing model for campaign access. However, you can extend sharing privileges for your own campaigns individually. Use campaign sharing to *increase* access to your campaigns; you cannot restrict access beyond your organization's default access levels.

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

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

Special Considerations

- To share a campaign, you must have Public Full Access to the campaign and have the `Marketing User` checkbox selected in your personal information.
- The **Sharing** button is available depending on your organization-wide default for campaigns.
- Make sure you are sharing records with users who have the appropriate "Read" object permission for viewing the shared records.
- Sharing a campaign does not automatically grant read access to all the campaign members. Make sure that the user you are sharing a campaign with has visibility to the associated leads or contacts.
- The campaign hierarchy statistic fields provide aggregate data for a parent campaign and all the campaigns below it in the hierarchy, regardless of whether a user has sharing rights to a particular campaign within the hierarchy. Therefore, consider your organization's campaign sharing settings when enabling campaign hierarchy statistics. If you do not want users to see aggregate hierarchy data, remove any or all of the campaign hierarchy statistic fields from the [Campaign Hierarchy](#) related list. These fields will still be available for reporting purposes.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view campaigns:

- Read on campaigns

To share campaigns:

- Read on campaigns

AND

`Marketing User` checked in your user information

Campaigns and Distributed Marketing

Distributed Marketing from Salesforce bridges the gap between corporate marketing, employees, channel partners, and your brand to deliver consistent experiences across corporate marketing and partner networks. Corporate marketers build on-brand, cross-channel journeys in Marketing Cloud and deploy them to advisors, owners, and partners. These individuals then add their contacts to the journeys and personalize messages for each contact.

Distributed Marketing is a managed package installed within clouds such as Sales, Service, Financial Services, and Partner Communities. Through Salesforce Campaigns, Distributed Marketing provides Marketing Cloud journey email content for distributed teams to personalize and send.

With Distributed Marketing:

- Connect a Marketing Cloud journey to one or more campaigns.
- Send single Marketing Cloud messages directly from contact, lead, and person account records.
- Create default options for personalizing messages, such as how the recipient is greeted.
- Review and approve leads, contacts, and person accounts to receive messages during the campaign.
- Personalize each message for individual campaign members or groups of campaign members.

SEE ALSO:

[Distributed Marketing](#)

Manage Campaign Members

Add members to campaigns and update member statuses to keep your campaigns humming.

[Add Members to Campaigns](#)

Add members to campaigns to target the customers you want.

[Work with Campaign Members](#)

Update campaign members to accurately track your prospects.

Add Members to Campaigns

Add members to campaigns to target the customers you want.

[Add Individual Members to Campaigns](#)

Hand-pick individual campaign members from contact, lead, or person account detail pages.

[Add Multiple Campaign Members](#)

[Add Members to Campaigns from Accounts](#)

Choose campaign members from the Contacts related list on your accounts.

[Add Multiple Contacts and Leads to Campaigns](#)

Quickly add lots of contacts, leads, and person accounts as members to your campaigns at one time.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view Campaigns tab:

- Read on campaigns

To view campaigns:

- Read on campaigns

To create campaigns:

- Create on campaigns

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

[Add Multiple Members to a Campaign from a List View](#)

Save time by adding up to 200 members to a campaign at once from your lead or contact list views. Or update the member status for members already associated with the campaign.

[Add Campaign Members from Standard and Custom Reports](#)

Adding members to a campaign is quick and easy when you add them from your lead, contact, and person account tabular, summary, and matrix reports.

[Import Campaign Members](#)

Add contacts, leads, and person accounts to campaigns via the Data Import Wizard.

[Add Existing Contacts to a Campaign with the Data Import Wizard](#)

To add multiple contacts as members of a campaign, launch the Data Import Wizard from the campaign detail page.

[Add Existing Leads to a Campaign with the Data Import Wizard](#)

To add multiple leads as members of a campaign, launch the Data Import Wizard from the campaign detail page.

[Add Existing Person Accounts to a Campaign with the Data Import Wizard](#)

To add multiple person accounts as members of a campaign, launch the Data Import Wizard from the campaign detail page.

[Create Contacts and Add Them to a Campaign with the Data Import Wizard](#)

With a single import file, you can create multiple contacts at once and make them members of a campaign.

[Create Leads and Add Them to a Campaign with the Data Import Wizard](#)

To add multiple leads as members of a campaign, launch the Data Import Wizard from the campaign detail page.

Add Individual Members to Campaigns

Hand-pick individual campaign members from contact, lead, or person account detail pages.

1. From a contact, lead, or person account detail page, go to the Campaign History related list and click **Add to Campaign**.
2. Specify the campaign.
3. On the Campaign Member Edit page, specify the campaign member status.
4. Save your work.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add or clone a campaign member:

- Read on campaigns
AND
Edit on leads and contacts

To edit individual campaign members:

- Read on campaigns
AND
Read or Edit on leads or contacts

Add Multiple Campaign Members


Adding Campaign Members from the Manage Members Page

You can add leads and contacts as members of a campaign from the Manage Members page. To add contacts to a campaign, the [Add to Campaign checkbox must be enabled](#).

 **Note:** Before using the Manage Members page, verify that you are using a supported browser.


To add campaign members from the Manage Members page:

1. Click **Manage Members** and choose **Add Members - Search** from the drop-down button on a campaign detail page or the Campaign Members related list.
2. On the Add Members subtab, select the **Leads** or **Contacts** radio button to add leads or contacts, respectively.
3. Search for leads or contacts:
 - You can specify search filters and click **Go!**
 - Alternatively, you can select an existing view, such as all open leads, from the Use Existing View drop-down list. Your results will display automatically. If you select an existing view, you can modify its criteria by adding or changing filters, and clicking **Go!**

 **Note:** You cannot modify filter criteria if you selected a view that uses advanced options or that uses more than five filters. Filter criteria will be reflected in your search results for these views, though not all filter criteria will display.

4. Select the checkboxes next to the records you want to add. To select all records on the current page, select the checkbox in the header row.
5. Select a status from the **Add with Status** drop-down list.

A confirmation message will display and you will see the members you added on the Existing Members subtab.

 **Note:** If you are unable to add contacts, enable the [Add to Campaign checkbox](#):

1. From the object management settings for contacts, go to Search Layouts.
2. Click **Edit** next to Contacts List View.
3. Select [Add to Campaign](#).
4. Click **Save**.

The latest Manage Members page is not available in accessibility mode. In accessibility mode, you can still [add contacts or leads to a campaign](#), [update campaign members](#), and [remove campaign members](#) using the campaign member wizards.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add campaign members:

- Edit on campaigns
- AND
- Edit on leads and contacts
- AND
- Marketing User checked in your user information

To remove campaign members:

- Read on campaigns
- AND
- Edit on leads or contacts

Add Members to Campaigns from Accounts

Choose campaign members from the Contacts related list on your accounts.

1. From an account detail page, go to the Contacts related list.
2. Add one or more contacts as campaign members.
 - To add a single campaign member, choose **Add to Campaign** from the Actions menu next to the contact.
 - To add more than one member, click **View All**, then select campaign members and click **Add to Campaign**. The maximum number of contacts viewable per page is 200.
3. Specify the campaign.
4. Specify the campaign member status.
5. Click **Submit**.

EDITIONS

Available in: Lightning Experience and the Salesforce app

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

USER PERMISSIONS

To add or clone a campaign member:

- Read on campaigns
AND
Edit on leads and contacts

To edit individual campaign members:

- Read on campaigns
AND
Read or Edit on leads or contacts

Add Multiple Contacts and Leads to Campaigns

Quickly add lots of contacts, leads, and person accounts as members to your campaigns at one time.

1. From the Campaign Members related list on a campaign, click **Add Leads** or **Add Contacts**.
2. Select leads or contacts from the list, or search for specific leads or contacts.
3. Click **Next**.
4. Select a member status for the added members.
5. Choose whether to apply the member status to selected leads or contacts who are already members of the campaign.
6. Click **Submit**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add multiple contacts, leads, and person accounts to campaigns:

- Marketing User in your user information
AND
Edit on campaigns
AND
Read on contacts, leads, and person accounts

Add Multiple Members to a Campaign from a List View

USER PERMISSIONS

To add contacts to a campaign:	Marketing User checked in your user information AND Edit on campaigns AND Edit on contacts
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To add leads to a campaign:	Marketing User checked in your user information AND Edit on campaigns AND Edit on leads
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To add person accounts to a campaign:	Marketing User checked in your user information AND
---------------------------------------	--

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Edit on campaigns

AND

Edit on contacts

Save time by adding up to 200 members to a campaign at once from your lead or contact list views. Or update the member status for members already associated with the campaign.

1. Navigate to a contact or lead list view.
2. Select up to 200 records to add to a campaign.
3. Click **Add to Campaign**.
4. Enter the name of a campaign.
5. Select a member status for the new members.
6. Choose whether members already associated with the campaign keep their current status. If you want, update their status with the one you selected for new members.
7. Add the members.

Add Campaign Members from Standard and Custom Reports

USER PERMISSIONS

To add campaign members from a contact report:

Marketing User checked in your user information

AND

Edit on campaigns

AND

Read on contacts

AND

Read on reports

To add campaign members from a lead report:

Marketing User checked in your user information

AND

Edit on campaigns

AND

Read on leads

AND

Read on reports

To add campaign members from a person account report:

Marketing User checked in your user information

AND

Edit on campaigns

AND

Read on contacts

AND

Read on reports

Adding members to a campaign is quick and easy when you add them from your lead, contact, and person account tabular, summary, and matrix reports.

Available in: Salesforce Classic and Lightning Experience

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

1. From a report that returns lead, contact, or person account records, click **Add to Campaign**.
If the **Add to Campaign** button is disabled, modify your report to return fewer than 50,000 records.
2. Enter the name of a campaign.
3. Select a member status for the new members.
4. Choose whether members already associated with the campaign keep their status. If you want, update their status with the one you selected for new members.
5. In Lightning Experience, click **Submit**. In Salesforce Classic, click **Add to Campaign**.
6. In Lightning Experience, you receive an email when adding members is complete. In Salesforce Classic, review the confirmation screen and then click **Done**.

Be aware of these considerations when adding campaign members from a report:

- To add members to campaigns from custom reports, the report's primary object must be lead or contact.
- To add members to campaigns from reports in Lightning Experience, the custom report type must include the Full Name field.
- If you interrupt the add campaign members process, some members can still be added to the campaign. That's because members are added in batches.
- If lead or contact records are edited after you start the process but before they have been added, those records will not be added to the campaign.
- You can add active leads to campaigns—not converted leads. If converted leads appear on your report, don't worry, only the active leads are added to the campaign.

Import Campaign Members

Add contacts, leads, and person accounts to campaigns via the Data Import Wizard.

With the Data Import Wizard, a designated marketing user can use a CSV (comma-separated values) file to import contacts, leads, or person accounts and track their responses at each stage of a campaign.

For example, you can mark each contact, lead, or person account as "Planned" at the beginning of the campaign. Then mark them as "Responded" after they respond. These responses are referred to as the member statuses.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Add Existing Contacts to a Campaign with the Data Import Wizard

USER PERMISSIONS

To add contacts that you own to a campaign via the Data Import Wizard:

Marketing User selected in your user information

AND

Create on accounts

AND

Read on contacts

AND

Edit on accounts and campaigns

AND

Import Personal Contacts

To add contacts owned by others to a campaign via the Data Import Wizard:

Marketing User selected in your user information

AND

Create on accounts

AND

Read on contacts

AND

Edit on accounts, contacts, and campaigns

AND

Modify All Data

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

To add multiple contacts as members of a campaign, launch the Data Import Wizard from the campaign detail page.

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Account: Salesforce ID
- Contact: Salesforce ID
- Contact: Last Name



Tip: To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

1. If you're using Lightning Experience, from the campaign members related list, select **Import Leads and Contacts**. If you're using Salesforce Classic, from the campaign detail page, select **Manage Members > Add Members - Import File**. The Data Import Wizard appears.
2. Select **Accounts and Contacts**, then select **Update existing records**.
3. Set Match Contact by to **Salesforce.com ID**.
4. Set Match Account by to **Salesforce.com ID**.

5. Select the CSV file that contains your import data, and click **Next**.
6. Map column headers from your CSV file to these fields.
 - Account: Salesforce ID
 - Contact: Salesforce ID
 - Contact: Last Name
7. Click **Next**.
8. Review the import settings, and then click **Start Import**.


When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred. A separate email notifies you of campaign member job results.

Add Existing Leads to a Campaign with the Data Import Wizard

To add multiple leads as members of a campaign, launch the Data Import Wizard from the campaign detail page.

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Salesforce ID of the lead
- Last Name of the lead

 **Tip:** To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

1. From the campaign detail page, select **Manage Members > Add Members - Import File**. The Data Import Wizard appears.
2. Select **Leads**, then select **Update existing records**.
3. Set **Match Lead by** to **Salesforce.com ID**.
4. Select **Assign leads to campaigns**.
5. Select the CSV file that contains your import data, and click **Next**.
6. Select **Assign contacts to campaigns**.
7. Map column headers from your CSV file to these fields.
 - Salesforce ID of the lead
 - Last Name of the lead
8. Click **Next**.
9. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add existing leads to a campaign via the Data Import Wizard:


- **Marketing User** selected in your user information
- AND
- Edit on campaigns
- AND
- Import Leads

Add Existing Person Accounts to a Campaign with the Data Import Wizard


To add multiple person accounts as members of a campaign, launch the Data Import Wizard from the campaign detail page.

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Salesforce ID of the contact associated with the person account
- Email

 **Tip:** To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

1. From the campaign detail page, select **Manage Members > Add Members - Import File**. The Data Import Wizard appears.
2. Select **Person Accounts**, then select **Update existing records**.
 -  **Note:** Even though the **Add new and update existing records** option appears, you can't use it to add new person accounts to campaigns.
3. For Match Lead by, select **Salesforce.com ID**.
4. Select **Assign person accounts to campaigns**.
5. Select the CSV file that contains your import data, and click **Next**.
6. Map column headers from your CSV file to these fields.
 - Salesforce ID of the contact associated with the person account
 - Email
7. Click **Next**.
8. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

Create Contacts and Add Them to a Campaign with the Data Import Wizard

USER PERMISSIONS

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add person accounts that you own to a campaign via the Data Import Wizard:

- Create on accounts
- AND
- Edit on accounts
- AND
- Import Personal Contacts

To add person accounts owned by others to a campaign via the Data Import Wizard:

- Create on accounts
- AND
- Edit on accounts and contacts
- AND
- Modify All Data

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

To create contacts that you own and add them to a campaign via the Data Import Wizard:

Marketing User selected in your user information
 AND
 Create on accounts
 AND
 Read on contacts
 AND
 Edit on accounts and campaigns
 AND
 Import Personal Contacts


To create contacts owned by others and add them to a campaign via the Data Import Wizard:

Marketing User selected in your user information
 AND
 Create on accounts
 AND
 Read on contacts
 AND
 Edit on accounts, contacts, and campaigns
 AND
 Modify All Data

With a single import file, you can create multiple contacts at once and make them members of a campaign.

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Account: Account Name
- Contact: Email
- Contact: Last Name
- Contact: First Name (optional but recommended)

 **Tip:** To obtain values that are already in your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

1. From the campaign detail page, select **Manage Members > Add Members - Import File**. The Data Import Wizard appears.
2. Select **Accounts and Contacts**, then select **Add new and update existing records**.
3. Set **Match Contact by** to **Email**.
4. Set **Match Account by** to **Account Name and Account Site**.
5. Select **Assign contacts to campaigns**.
6. Select the CSV file that contains your import data, and click **Next**.
7. Map column headers from your CSV file to these fields.
 - Account: Account Name

- Contact: Email
- Contact: Last Name
- Contact: First Name (optional but recommended)

8. Click **Next**.

9. Review the import settings, and then click **Start Import**.


When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred. A separate email notifies you of campaign member job results.

Create Leads and Add Them to a Campaign with the Data Import Wizard

To add multiple leads as members of a campaign, launch the Data Import Wizard from the campaign detail page.

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Email
- Company
- Last Name
- First Name (optional but recommended)

 **Tip:** To obtain values that are already in your org, run reports and then export the report data.

These steps describe one recommended method of importing data. You can import data into Salesforce fields that aren't listed here. You can also customize your import by using other options that appear in the Data Import Wizard.

1. From the campaign detail page, select **Manage Members > Add Members - Import File**. The Data Import Wizard appears.
2. Select **Leads**, then select **Add new and update existing records**.
3. Set **Match Lead by** to **Email**.
4. Select **Assign leads to campaigns**.
5. Select the CSV file that contains your import data, and click **Next**.
6. Map column headers from your CSV file to these fields.
 - Email
 - Company
 - Last Name
 - First Name (optional but recommended)

7. Click **Next**.

8. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create leads and add them to a campaign via the Data Import Wizard:

- **Marketing User** selected in your user information
- AND
- Edit on campaigns
- AND
- Import Leads

Work with Campaign Members

Update campaign members to accurately track your prospects.

[Displaying and Editing a Campaign Member](#)

[Campaign Member Task Overview](#)

Create campaign members from lead, contact, or person account records. Salesforce provides a variety of ways in which you can manage your campaign members.

[Work with the Campaign Members Related List](#)

Manage campaign members directly from a campaign detail page.

[Editing Multiple Campaign Members](#)

[Add or Update Campaign Members with the Data Import Wizard](#)

To add or update many campaign members at once, launch the Data Import Wizard from the campaign detail page.

[Delete Individual Members from Campaigns](#)

Remove individual campaign members from campaigns.

[Delete Multiple Contacts and Leads from Campaigns](#)

Save time by removing lots of campaign members from campaigns at a time while in accessibility mode.

EDITIONS


Available in: both Salesforce Classic and Lightning Experience

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

Displaying and Editing a Campaign Member

From the campaign member detail page, you can edit, delete, or clone a campaign member record. Additionally, if the campaign member is based on a lead, you can convert the lead; if the campaign member is based on a contact, you can create an opportunity.


To view the campaign member detail page, click the campaign member's name in the Name, First Name, or Last Name columns on the Campaign Members related list on a campaign detail page or on the Existing Members tab.

 **Note:** To view a campaign member, you must have permissions on the campaign and the lead or contact. For example, to view a campaign member created from a lead, you must be able to view both the campaign and the lead.

To edit the campaign member detail page layout, from the object management settings for campaign members, go to Page Layouts, and then click **Edit** next to the page layout name.

Editing a Campaign Member

To edit a campaign member, click **Edit** on the campaign member detail page, change the fields you want to update, then click **Save**. Fields derived from the contact or lead can only be edited from the lead or contact detail pages.


 **Note:** If your administrator has enabled inline editing for your organization, you cannot use inline editing on the `STATUS` drop-down list on the campaign member detail page. Instead, click **Edit** on the campaign detail page to edit the `STATUS` drop-down list.

Cloning a Campaign Member

To clone a campaign member, click **Clone** on the campaign member detail page, then select a campaign and a contact or lead. Change the fields you want to clone for the new campaign member, then click **Save**.

Deleting a Campaign Member

To delete a campaign member, click **Delete** on the campaign member detail page.

 **Note:** Deleting a campaign member record is permanent; the record is not recoverable from the recycle bin. However, the original lead or contact record is not deleted.

Converting a Lead

If the campaign member was created from a lead, you can click **Convert Lead** on the campaign member detail page to convert the lead. When you convert a lead, the campaign member is still a part of the campaign, but its type changes from lead to contact.

Creating an Opportunity

If the campaign member was created from a contact, you can click **Create Opportunity** on the campaign member detail page to create an opportunity. When you create an opportunity, the campaign member is still a part of the campaign.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view, edit, or remove campaign members:

- Read on campaigns
- AND
- Read on leads
- AND
- Read on contacts

To add campaign members:

- Read on campaigns
- AND
- Edit on leads
- AND
- Edit on contacts

Campaign Member Task Overview

Create campaign members from lead, contact, or person account records. Salesforce provides a variety of ways in which you can manage your campaign members.

You can search for and add or edit multiple leads and contacts from the Manage Members page. You can add members to a campaign one at a time from contact or lead detail pages. With the Data Import Wizard, you can add up to 50,000 leads, contacts, or person accounts at a time to a campaign. You can also use the Data Import Wizard to update the statuses of up to 50,000 campaign members at a time.

Adding Campaign Members

You can [add new members to a campaign](#):

- Individually from the Campaign History related list on a contact, lead, or person account detail page
- By searching for contacts and leads from the [Manage Members page](#)
- [From a campaign, contact, person account, or lead report](#)
- [From a list view of existing contacts or leads](#)
- [From a CSV import file of existing leads](#)
- [From a CSV import file of existing contacts](#)
- [From a CSV import file of existing person accounts](#)
- [From a CSV import file of new leads](#)
- [From a CSV import file of new contacts](#)

Editing Campaign Members

You can edit the details of existing campaign members:

- Campaign History related list on a contact, lead, or person account detail page
- [From the Campaign Members related list](#) on a campaign detail page
- [From the Manage Members page](#)

Updating the Status of Existing Campaign Members

You can update the status of existing campaign members:

- From the Campaign History related list on a contact, lead, or person account detail page
- [From the Manage Members page](#)
- [From a campaign, contact, person account, or lead report](#)
- [From a CSV import file of existing members](#)

Removing Campaign Members

You can remove members of a campaign:

- From the Campaign History related list on a contact, lead, or person account detail page
- [From the Campaign Members related list](#) on a campaign detail page
- [From the Manage Members page](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Example Uses

- **Create follow-up campaigns**—Search for a custom list view of contacts or leads that is restricted to an earlier campaign and a certain member status, such as “Attended”. Then add items from the generated list to a follow-up campaign. See [Add Multiple Members to a Campaign from a List View](#) on page 23.
- **Leverage reporting functionality**—Customize a standard report or build a new custom report that returns a list of contacts, person account, or leads that you want to target. With the click of a button, you can add the entire list to a campaign. See [Add Campaign Members from Standard and Custom Reports](#) on page 24.

Work with the Campaign Members Related List

Manage campaign members directly from a campaign detail page.

Use the **Manage Members** option in the Campaign Members related list and in the campaign detail section to search for leads and contacts and add them as campaign members, update or remove existing members, and add or update campaign members using an import file.

You use the Campaign Members related list to:

- Add individual members from a search
- Add multiple members from an import file
- Edit members
- Update member statuses from an import file

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add or clone a campaign member:

- Read on campaigns
- AND
- Edit on leads and contacts

To view and edit the campaign members related list:

- Read on campaigns
- AND
- Read on leads or contacts

To view and use the **Manage Members** button on the campaign members related list:

- Edit on campaigns
- AND
- Read on leads or contacts


Editing Multiple Campaign Members

Editing Campaign Members from the Manage Members Page

 **Note:** Before using the Manage Members page, verify that you are using a supported browser.

To update the campaign member status, edit campaign member details, or remove campaign members from the Manage Members page:

1. Click **Manage Members** and choose **Edit Members - Search** from the drop-down button on a campaign detail page or the Campaign Members related list on a campaign detail page.
2. On the Existing Members subtab, optionally enter filter criteria to find existing members and click **Go!**.

 **Note:** For campaigns with campaign members created from both leads and contacts, you must have "Read" permission on leads and contacts to see all members. If you only have "Read" on leads, you see only campaign members created from leads. If you only have "Read" on contacts, you only see campaign members created from contacts.

3. Select the checkboxes next to the records you want to edit. To select all records on the current page, select the checkbox in the header row.
4. Optionally perform the following actions:
 - To change the campaign member status, select a status from the **Update Status** drop-down list.
 - To remove a member from a campaign, click **Remove**.
 - To edit the details of a campaign member, click **Edit**.
 - To [view, edit, delete, clone, a campaign member](#), click the campaign member's name in the Name column.

The latest Manage Members page is not available in accessibility mode. In accessibility mode, you can still [add contacts or leads to a campaign](#), [update campaign members](#), and [remove campaign members](#) using the campaign member wizards.

To update large numbers of campaign members, you can use the Data Loader application to export and then reimport campaign member data. Before uploading a CSV file with Data Loader, be sure to sort the file by Campaign ID. If you have problems reimporting your data, try splitting up the CSV file into a few smaller files and uploading them separately.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view the Existing Members tab:

- Edit on campaigns

AND

Read on leads or contacts

AND

Marketing User checked in your user information

To update and remove campaign members:

- Edit on campaigns

AND

Edit on leads and contacts

AND

Marketing User checked in your user information


Add or Update Campaign Members with the Data Import Wizard

To add or update many campaign members at once, launch the Data Import Wizard from the campaign detail page.

Add Campaign Members

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Salesforce ID of the contact or lead. For person accounts, use the contact ID associated with the person account as the Salesforce ID.
- Campaign ID (if you're on a non-campaign page and want to import records)


 **Tip:** To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

1. From the campaign detail page, select **Manage Members > Add Members - Import File**.
2. The Data Import Wizard appears.
3. Select the CSV file that contains your import data, and click **Next**.
4. Map column headers from your CSV file to these fields.
 - Salesforce ID of the contact or lead. For person accounts, use the contact ID associated with the person account as the Salesforce ID.
 - Campaign ID (if you're on a non-campaign page and want to import records)
5. Click **Next**.
6. Review the import settings, and then click **Start Import**. When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

Update Campaign Members

Before you begin, make sure that your import file is in CSV format and contains values for these fields.

- Salesforce ID of the contact, lead, or campaign member. For person accounts, use the contact ID associated with the person account as the Salesforce ID.
- Status of the campaign member.

 **Tip:** To obtain Salesforce IDs or other values from your org, run reports and then export the report data.

1. From the campaign detail page, select **Manage Members > Update Members - Import File**. The Data Import Wizard appears.
2. Select **Campaign Members**, then select **Update existing records**.
3. Select the CSV file that contains your import data, and click **Next**.
4. Map column headers from your CSV file to these fields.
 - Salesforce ID of the campaign member
 - Status of the campaign member
5. Click **Next**.
6. Review the import settings, and then click **Start Import**.

When we finish importing your data, we notify you by email. Review the results and resolve any errors that occurred.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add or update campaign members via the Data Import Wizard:

- **Marketing User** selected in your user information
- AND
- Read on contacts OR Import Leads
- AND
- Edit on campaigns

Delete Individual Members from Campaigns

Remove individual campaign members from campaigns.

1. From a campaign detail page, go to the Campaign Members related list.
2. Find the campaign member you want to delete.
3. In Lightning Experience, click **Delete** from the drop-down menu on the member's row. In Salesforce Classic, click Remove.

Delete Multiple Contacts and Leads from Campaigns

Save time by removing lots of campaign members from campaigns at a time while in accessibility mode.

1. From a campaign, click **Manage Members**.
2. Click either **Remove Members - Existing Contacts** or **Remove Members - Existing Leads**.
3. Choose the campaign members that you want to remove from the campaign.
4. When you are finished removing members from your campaign, click **Done** to exit the wizard.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To delete an individual campaign member:

- Read on campaigns
AND
Read on leads and contacts

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To delete multiple existing contacts and leads from campaigns:

- Marketing User checked in your user information
AND
Edit on campaigns and leads
AND
Read on contacts

Things to Know About Campaigns

Review these considerations before you work with campaigns. Learn more about campaigns, campaign members, and their fields.

[Campaign Fields](#)

[Campaign Member Fields](#)

[Considerations for Campaigns](#)

Review the following considerations before working with campaigns.

[Campaigns FAQ](#)

Campaign Fields

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

Field	Description
Active	Checkbox to mark whether the campaign is active or not.
Actual Cost	Amount of money spent to run the campaign.
Budgeted Cost	Amount of money budgeted for the campaign.
Campaign Currency	The default currency for currency amount fields in the campaign. Amounts display in the campaign currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.
Campaign Member Type	Record type for campaign members; determines the page layout of the members of the campaign.
Campaign Name	Identifying name for the campaign.
Campaign Owner	Assigned owner of the campaign.
Campaign Record Type	Record type for the campaign; determines the picklist values available for the campaign.
Converted Leads in Campaign	Number of leads that were converted to accounts due to the marketing efforts in the campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. For more information on converting leads, see Convert Qualified Leads on page 72. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
	in custom formula fields. Updates to this field do not trigger workflow rules.
Created By	User who created the campaign including creation date and time. (Read only)
Custom Links	Listing of custom links for campaigns as set up by your administrator.
Description	Description of the campaign. Up to 32KB of data are allowed in this field. Only the first 255 characters display in reports.
End Date	Ending date for the campaign. Responses received after this date are still counted.
Expected Response (%)	Percentage of responses you expect to receive for the campaign.
Expected Revenue	Amount of money you expect to generate from the campaign.
Last Modified By	User who last changed the campaign fields, including modification date and time. This does not track changes made to any of the related list items on the campaign. (Read only)
Opportunities in Campaign	Calculated field for number of opportunities associated with the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Num Sent	Number of individuals targeted by the campaign. For example, the number of emails sent.
Won Opportunities in Campaign	Calculated field for number of closed/won opportunities associated with the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Parent Campaign	The campaign above the selected campaign in the campaign hierarchy.
Start Date	Starting date for the campaign.
Status	Status of the campaign, for example, Planned, In Progress. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Total Actual Cost in Hierarchy	Calculated field for the total amount of money spent to run a campaign hierarchy. (Read only) Salesforce automatically calculates

Field	Description
Total Budgeted Cost in Hierarchy	this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Contacts in Campaign	Number of individuals on accounts that are associated with the campaign. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Contacts in Hierarchy	Calculated field for number of contacts associated with the campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Converted Leads in Hierarchy	Calculated field for the total number of leads associated with the campaign hierarchy that were converted into accounts, contacts, and opportunities. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Expected Revenue in Hierarchy	Calculated field for the total amount of money you expect to generate from a campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Leads in Campaign	Number of potential opportunities (leads) associated with the campaign. Salesforce automatically calculates this amount using

Field	Description
Total Leads in Hierarchy	all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Leads in Hierarchy	Calculated field for the total number of leads associated with the campaign hierarchy. This number also includes converted leads. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Num Sent in Hierarchy	Calculated field for the total number of individuals targeted by a campaign hierarchy, for example, the number of emails sent. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Opportunities in Hierarchy	Calculated field for the total number of opportunities associated with the campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Responses in Campaign	Calculated field for the total number of contacts and unconverted leads that have a <code>Member Status</code> equivalent to "Responded" for the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.
Total Responses in Hierarchy	Calculated field for number of contacts and unconverted leads that have a <code>Member Status</code> equivalent to "Responded" for the campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.

Field	Description
Value Opportunities in Campaign	<p>Calculated field for the amount of all opportunities associated with the campaign, including closed/won opportunities. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.</p> <p>For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency and displays in parentheses.</p> <p>For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount displays in parentheses.</p> <p>This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.</p>
Total Value Opportunities in Hierarchy	<p>Calculated field for total amount of all opportunities associated with the campaign hierarchy, including closed/won opportunities. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.</p> <p>All campaigns in a hierarchy must use the same currency.</p> <p>For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency and displays in parentheses.</p> <p>For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount displays in parentheses.</p>
Value Won Opportunities in Campaign	<p>Calculated field for amount of all closed/won opportunities associated with the campaign. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.</p> <p>For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency.</p>

Field	Description
	<p>For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount displays in parentheses.</p> <p>This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.</p>
<p>Total Value Won Opportunities in Hierarchy</p>	<p>Calculated field for amount of all closed/won opportunities associated with the campaign hierarchy. (Read only) Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them.</p> <p>All campaigns in a hierarchy must use the same currency.</p> <p>For organizations using multiple currencies, opportunity amounts are converted to the campaign currency. If your currency does not match the campaign currency, the amount is converted to your currency.</p> <p>For organizations using advanced currency management, opportunity amounts are converted to the campaign currency via dated exchange rates. If the campaign currency does not match your currency, the total of the opportunity amounts are converted using standard exchange rates, not dated exchange rates, and that amount displays in parentheses.</p> <p>This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.</p>
<p>Total Won Opportunities in Hierarchy</p>	<p>Calculated field for the total number of won opportunities associated with the campaign hierarchy. Salesforce automatically calculates this amount using all associated records regardless of whether you have read access to them. This field cannot be referenced in formulas for workflow rules, validation rules, field updates, or approval processes, but it can be referenced in custom formula fields. Updates to this field do not trigger workflow rules.</p>
<p>Type</p>	<p>Type of campaign, for example, Direct Mail or Referral Program. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.</p>

Campaign Member Fields

These are the fields (in alphabetical order) that make up a campaign member. Most campaign member fields are derived from the lead or contact record from which the campaign member was created and must be edited from the corresponding lead or contact record. Some of these fields may not be visible or editable depending on your page layout and field-level security settings.

Field	Description
Campaign	The campaign to which the lead or contact belongs.
Campaign Member Currency	The default currency for currency amount fields on the campaign member. Amounts display in the campaign member currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.
Campaign Member Type	The record type of the campaign member, which determines the page layout available for the campaign member. (Read only)
City	City portion of the lead or contact's address.
Company (Account)	The company, if the campaign member is based on a lead, or the account, if the campaign member is based on a contact.
Contact	The name of the contact, if the campaign member is based on a contact.
Country	Country portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Created By	User who created the campaign member. (Read only)
Created Date	Date the campaign member was created. (Read only)
Description	Description of the lead or contact.
Do Not Call	Whether the contact wants to be contacted by phone. If you use Data.com, the <code>Phone</code> field value is hidden from search results and on the Contact Card, and it's blank in <code>.csv</code> files that are created when you export records.
Email	Email address of the lead or contact.
Email Opt Out	Whether the contact wants to receive email. If you use Data.com, the <code>Email</code> field value is hidden from search results and on the Contact Card, and it's blank in <code>.csv</code> files that are created when you export records.
Fax	Fax number of the lead or contact.
Fax Opt Out	Whether the contact wants to be included in broadcast faxes.
First Name	First name of the lead or contact.
First Responded Date	Date the campaign member first responded. (Read only)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
Last Modified By	User who last changed the campaign member record. (Read only)
Last Modified Date	Date the campaign member record was last modified. (Read only)
Last Name	Last name of the lead or contact.
Lead	The name of the lead, if the campaign member is based on a lead.
Lead Source	Source of lead, for example, Advertisement, Partner, or Web. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Mobile	Mobile phone number for the lead or contact.
Phone	Phone number for the lead or contact.
Responded	Indicates if the campaign member has responded.
Salutation	The salutation for addressing the person, for example, Mr., Ms., Dr., or Prof.
State/Province	State or province portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.
Status	The status of the campaign member, for example, sent or responded.
Street	Street portion of the lead or contact's address.
Title	The title of the lead or contact, for example, President.
Zip/Postal Code	Zip or postal code portion of the lead or contact's address.

Considerations for Campaigns

Review the following considerations before working with campaigns.

Communities

When working with campaigns within a community, there are some limitations.

- The View Campaign Hierarchy action does not appear on campaign detail pages.
- The Campaign Influence and Campaign Member Status related lists do not appear.
- You can't drill into the Campaign Hierarchy related list.
- The Add to Campaign action does not appear on the Lead Home or Contact Home pages.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Campaigns FAQ

- [Can I use mass email for my email campaigns?](#)
- [How can I track which opportunities resulted from campaigns?](#)
- [How can I calculate the ROI for my campaigns?](#)
- [How do I add contacts and leads to campaigns?](#)
- [How is Campaign influence different from ROI reports?](#)
- [Who has access to campaigns?](#)

[Can I use mass email for my email campaigns?](#)

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[How is Campaign influence different from ROI reports?](#)

[Who has access to campaigns?](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Can I use mass email for my email campaigns?

Mass email is designed for small-scale sales and support mailings, not for marketing purposes. We recommend that you use Salesforce Marketing Cloud or a third-party application in the [AppExchange](#) that allows you to centrally manage email campaigns and track responses.

How do I add contacts and leads to campaigns?

Your company's campaigns typically target existing customers (contacts) and prospective customers (leads). You can associate contacts and leads with campaigns as campaign members.

- To add an individual contact or lead to a campaign, click **Add to Campaign** on the contact or lead record, and then select a campaign.
- To add multiple contacts or leads to a campaign, use these tables to find the steps recommended for the source of contact or lead information that you're using.

Contact Source	Steps for Adding Contacts to Campaigns	Maximum Number of Records You Can Add
A report of existing contacts	Add Campaign Members from Standard and Custom Reports	50,000 per report
A .csv file of existing contacts	Add Existing Contacts to a Campaign with the Data Import Wizard	50,000 per import file
A .csv file of new contacts	Create Contacts and Add Them to a Campaign with the Data Import Wizard	50,000 per import file
A list view of existing contacts	Add Multiple Members to a Campaign from a List View	250 per list page
The Contacts related list on an Account	Add Members to Campaigns from Accounts	200 per list page

Lead Source	Steps for Adding Leads to Campaigns	Maximum Number of Records You Can Add
A report of existing leads	Add Campaign Members from Standard and Custom Reports	50,000 per report
A .csv file of existing leads	Add Existing Leads to a Campaign with the Data Import Wizard	50,000 per import file
A .csv file of new leads	Create Leads and Add Them to a Campaign with the Data Import Wizard	50,000 per import file
A list view of existing leads	Add Multiple Members to a Campaign from a List View	250 per list page

How can I calculate the ROI for my campaigns?

The Campaign ROI Analysis Report is located on the Reports tab in the Campaign Reports folder. It calculates your campaigns' performance by return on investment (ROI) and average cost. For each campaign in the report:

- ROI, which is expressed as a percentage, is calculated as the net gain (Value Won Opportunities in Campaign - Actual Cost) divided by the Actual Cost.
- Value Won Opportunities in Campaign is the calculated amount of all closed or won opportunities where the campaign is the Primary Campaign Source on the opportunity.

How can I track which opportunities resulted from campaigns?

One key benefit of campaigns is the ability to track how much business has been generated from each campaign. When you create an opportunity, you can fill in the `Primary Campaign Source` field to indicate that the opportunity resulted from a specific campaign.

In addition, when you convert a lead that is linked to a campaign, that campaign is automatically inserted into the opportunity `Primary Campaign Source` field.

If a lead or contact is linked to multiple campaigns, the campaign with which he or she is most recently associated is inserted into the opportunity `Primary Campaign Source` field.

The Opportunities related list on a campaign shows every opportunity that is linked to that campaign. You can also run the Campaign Revenue Report to track which opportunities are linked to your campaigns.

How is Campaign influence different from ROI reports?

Campaign influence tracks pipeline and revenue for multiple campaigns, and ties all campaigns of a contact role to that opportunity for pipeline and ROI reporting. This is especially helpful for longer deal cycles when more than one campaign contributes to a closed deal or a converted lead.

Who has access to campaigns?

Depending on your sharing settings, users in your org can view campaigns, view the advanced campaign setup, or run campaign reports. However, only designated marketing users with the appropriate user permissions can create, edit, and delete campaigns and configure advanced campaign setup. An administrator must select the `Marketing User` option on a user's personal information to designate that user as a marketing user.

In addition, marketing users with the appropriate user permissions can use the Data Import Wizard to add contacts, leads, and person accounts as campaign members. They can also use the Data Import Wizard to update the statuses of campaign members.

Campaign Influence

Understand how your campaigns are affecting your opportunity pipeline.

[Customizable Campaign Influence](#)

Customizable Campaign Influence lets you decide how credit is assigned to each campaign that contributes to bringing in an opportunity.

[Campaign Influence 1.0](#)

Use the original version of Campaign Influence to understand the return on your campaign investments.

Customizable Campaign Influence

Customizable Campaign Influence lets you decide how credit is assigned to each campaign that contributes to bringing in an opportunity.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

[Set Up Customizable Campaign Influence](#)

To set up and deploy Customizable Campaign Influence, follow these steps.

[Manage Customizable Campaign Influence](#)

Assign influential campaigns to the opportunities they generate and view campaign results.

[Things to Know About Customizable Campaign Influence](#)

Review these details about Customizable Campaign Influence. Learn more about the differences between Customizable Campaign Influence and the original version of Campaign Influence.

Set Up Customizable Campaign Influence

To set up and deploy Customizable Campaign Influence, follow these steps.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

[Configure Customizable Campaign Influence](#)

Allow your marketing department to attribute revenue from an opportunity across multiple campaigns when you enable Customizable Campaign Influence.

[Enable Users for Customizable Campaign Influence](#)

Be sure the sales and marketing users who plan to use Customizable Campaign Influence have the Sales User permission set assigned with the Campaign Influence permission enabled.

[Add Customizable Campaign Influence to Page Layouts](#)

Let your marketing users see the campaigns that influence each opportunity and the results of each campaign.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

EDITIONS

This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

[Create a Custom Campaign Influence Model](#)

To implement a custom influence attribution model, first add a model in Setup with a few clicks. Then create a set of triggers and processes that add campaign influence records and assign them to the model. Work with partners if you want help implementing a custom model.

[Designate a Default Campaign Influence Model](#)

Change which of your campaign influence models displays data on opportunity and campaign detail pages.

[Lock a Campaign Influence Model](#)

Prevent users from adding or editing campaign influence records for a campaign influence model by locking the model. Locked models can only be accessed via the API.

Configure Customizable Campaign Influence

Allow your marketing department to attribute revenue from an opportunity across multiple campaigns when you enable Customizable Campaign Influence.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

1. From Setup, enter *Campaign Influence* in the **Quick Find** box and then click **Campaign Influence Settings**.
2. Select **Enabled**.
3. If your org uses both Sales Cloud and Pardot Professional, Pardot Enterprise, or Pardot Ultimate, you can choose to enable **Additional Campaign Influence Models**. Separate models are available to automatically track the first touch, last touch, or evenly distribute revenue attribution to all the campaigns that influence an opportunity.

Additional Campaign Influence Attribution Models is available to customers who have a Lightning Sales Cloud Professional, Enterprise, or Performance Edition subscription or Lightning CRM Professional, Enterprise or Performance Edition subscription and a Pardot Pro, Pardot Enterprise, or Pardot Ultimate subscription. Contact your Account Executive to enable this feature if it has not yet been provisioned.

4. Click **Auto-Association Settings**.

Auto-association adds campaigns to opportunities automatically when the contact on an opportunity is also a member of a campaign. The contact listed on the opportunity must also be assigned a contact role on the opportunity before its close date. Auto-association is always on for models included with Salesforce. Auto-association doesn't apply to custom models you create.

5. Optionally, constrain campaign auto-association by limiting the days that can pass between when a contact is added to a campaign and an opportunity's creation date.

For example, to prevent a campaign from being auto-associated with an opportunity created more than 90 days after the contact was added to the campaign, enter *90*.

6. Optionally, define filter criteria that must be met in order for a campaign to be automatically associated with an opportunity.
7. Click **Model Settings**.
8. Optionally, to modify the values for a specific model, click **Edit** next to the model name.
9. To make the model display its records in the Campaign Influence related list on campaigns, click **Default Model**. Only one of your models can be the default.
10. To make the model active, click **Active**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up Customizable Campaign Influence:


- **Customize Application and Sales Cloud or CRM** permission set license

When active, the Primary Campaign Source, First Touch, Last Touch, and Even Distribution models create records when there's a match between an opportunity contact role and a campaign member (auto-association). To set any model as the default model, it must be active. Deactivating a model deletes its records. For custom models, the Active field is ignored.

11. For Record Preference, to create campaign influence records regardless of the revenue attribution, choose **All Records**. To create records only when the revenue attribution is greater than 0%, choose **Records with >0% Attribution**.


For custom models, the value is always All Records.

12. Click **Save**.

-  **Note:** When this feature is enabled, encourage marketers to begin using the Campaigns with Influenced Opportunities (Customizable Campaign Influence) standard report type. Users can still view their existing Campaign Influence 1.0 reports, but creating those reports is only possible via the API, or by disabling Customizable Campaign Influence.

Enable Users for Customizable Campaign Influence

Be sure the sales and marketing users who plan to use Customizable Campaign Influence have the Sales User permission set assigned with the Campaign Influence permission enabled.

-  **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

1. Add the Sales User permission set to user profiles assigned to users who plan to track campaigns that influence opportunities.
2. In the Sales User permission set, enable the Campaign Influence permission.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To assign permission sets:

- Customize Application

Add Customizable Campaign Influence to Page Layouts

Let your marketing users see the campaigns that influence each opportunity and the results of each campaign.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

- Add the Campaign Influence related list to Opportunity page layouts.
This related list shows the campaigns that have touched the opportunity. Only campaign influence records from your default influence model appear in the list.
- Add the Influenced Opportunities related list to Campaign page layouts.
This related list shows the opportunities influenced by the campaign. Only campaign influence records from your default influence model appear in the list.
- Add the Campaign Results section to Campaign page layouts.
The Campaign Results section shows the total amount brought in by the campaign, based on your default campaign influence model.
- Add the Campaign Influence related list to Account page layouts.
This related list shows the opportunities on the account along with the campaign that generated each of them. The opportunities displayed are based on the default campaign influence model you designate in Setup.

Create a Custom Campaign Influence Model

To implement a custom influence attribution model, first add a model in Setup with a few clicks. Then create a set of triggers and processes that add campaign influence records and assign them to the model. Work with partners if you want help implementing a custom model.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

1. From Setup, enter *Model Settings* in the **Quick Find** box, and then click **Model Settings**.
2. Click **New Attribution Model**.
3. Enter a name for the model.
4. To make this model the default model, select **Is Model Default**.
Only campaign influence records for the default model appear in the Campaign Influence related list on opportunities. Records from the default model also appear in the Influenced Opportunities Related list and Campaign Statistics section on campaigns.
5. To prevent users from adding, editing, or deleting campaign influence records for this model on campaign detail pages, select **Locked**.
Records for locked models can only be created and updated via the API.
6. Choose a Record Preference for the model.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add the Campaign Influence related list to page layouts:

- "Customize Application"
AND
A Sales Cloud or CRM User permission set license
AND
A permission set with the "Campaign Influence" permission

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up Customizable Campaign Influence:


- Customize Application
AND
a Sales Cloud or CRM permission set license

- To create records every time a campaign touches an opportunity, choose **All Records**.
 - To create records only when the revenue attribution is more than 0%, choose **Records With >0% Attribution**.
7. Optionally, enter a description for the model.
 8. Click **Save**.

 **Note:** On custom models, the Active field is ignored.

Designate a Default Campaign Influence Model

Change which of your campaign influence models displays data on opportunity and campaign detail pages.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

1. From Setup, enter *Model Settings* in the **Quick Find** box, and then click **Model Settings**.
2. Click **Edit** next to the model you want to designate as the default model.
3. Click **Default Model**.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up Customizable Campaign Influence:

- Customize Application
AND
Sales Cloud or CRM permission set license

Lock a Campaign Influence Model

Prevent users from adding or editing campaign influence records for a campaign influence model by locking the model. Locked models can only be accessed via the API.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

1. From Setup, enter *Model Settings* in the **Quick Find** box, and then click **Model Settings**.
2. Click **Edit** next to the model you want to lock.
3. Click **Locked**.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up Customizable Campaign Influence:

- [Customize Application](#)
- AND
- Sales Cloud or CRM permission set license

Manage Customizable Campaign Influence

Assign influential campaigns to the opportunities they generate and view campaign results.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

[Add Influential Campaigns to an Opportunity](#)

Manage lists of campaigns that influence your opportunities directly on opportunity detail pages.

[View Campaign Results by Campaign](#)

Understand the return on investment for a campaign by seeing the opportunities influenced by a campaign and the total revenue represented by those opportunities.

[View Campaign Results by Account](#)

Understand how marketing is impacting the pipeline within a given account. See the opportunities on an account and the campaigns that influenced them using the Campaign Influence related list.

[Report on Campaign Results](#)

Get a better understanding of your campaigns' return on investment by creating reports that combine campaign influence with Opportunities, Campaigns, Contacts, and Accounts.


EDITIONS

Available in: Salesforce Classic and Lightning Experience


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

Add Influential Campaigns to an Opportunity

Manage lists of campaigns that influence your opportunities directly on opportunity detail pages.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

Consider these details before adding influential campaigns to your opportunities.

- If your business uses the Primary Campaign Source influence model, you can't add influential campaigns manually to opportunities. Campaigns are automatically added to opportunities based on the rules your admin defines.
 - If your business uses another campaign influence model and your admin has allowed it, you can add influential campaigns to opportunities yourself.
1. View the detail page of an opportunity.
 2. Click **New** in the Campaign Influence related list.
 3. In the Campaign name field, enter a campaign name or click  to search for a campaign.
 4. If you are using the Primary Campaign Source influence model and you want to designate the campaign as the primary campaign, select **Primary Campaign Source**.
 5. Click **Save**.

View Campaign Results by Campaign

Understand the return on investment for a campaign by seeing the opportunities influenced by a campaign and the total revenue represented by those opportunities.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

When you view a campaign detail page, the Influenced Opportunities (1) related list displays the opportunities generated by the campaign. The opportunities displayed are based on the default campaign influence model designated by your admin.

EDITIONS

This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

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

USER PERMISSIONS

To view the campaign influence related list:

- Read on Campaigns and Opportunities

To manually add or update influential campaigns:

- Read on Campaigns

AND

Read and Edit on Opportunities

AND

Marketing User selected in user details

EDITIONS

This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

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

USER PERMISSIONS

To view campaign details:

- Read on Campaigns

The screenshot shows the Salesforce interface for a campaign. At the top, there's a navigation bar with 'Sales', 'Home', 'Leads', 'Campaigns', 'Contacts', 'Accounts', 'Opportunities', 'Reports', 'Dashboards', and 'Chatter'. Below this, the campaign name 'Winter '16 Customer Conference (Demo)' is displayed. A 'Campaign Statistics' section is highlighted with a red box and the number '1'. This section contains a donut chart showing '10' and a table of 'Influenced Opportunities (6)'. The table has columns for Opportunity Name, Close Date, Influence (%), and Revenue Share.

OPPORTUNITY NAME	CLOSE DATE	INFLUENCE (%)	REVENUE SHARE
Acme - 1,200 Widgets (Sample)	4/26/2016	33.33%	\$45,662.00
Acme - 10,000 Widgets (Demo)	6/30/2016	12.50%	\$12,500.00
Acme - 200 Widgets (Sample)	8/16/2016	33.34%	\$6,668.00
Global Media - 250 Widgets (Sample)	4/21/2016	33.33%	\$1,666.50
Salesforce.com - 200 Widgets	4/6/2016	50.00%	\$10,000.00
salesforce.com - 200 Widgets (Sample)	5/1/2016	33.33%	\$6,666.00

The Campaign Statistics section (1) of the campaign detail page displays a summary of the opportunities generated by the campaign, including the number of opportunities, the total revenue from those opportunities, and the total revenue from won opportunities.

This screenshot provides a more detailed view of the campaign statistics. The 'Campaign Statistics' section is highlighted with a red box and the number '1'. It lists various metrics such as Total Responses, Total Leads, Converted Leads, Total Contacts, Total Responses in Hierarchy, Total Leads in Hierarchy, and Total Contacts in Hierarchy. It also includes 'Hierarchy Information' with metrics like Total Num Sent in Hierarchy, Total Opportunities in Hierarchy, Total Responses in Hierarchy, Total Value Opportunities in Hierarchy, Total Leads in Hierarchy, Total Won Opportunities in Hierarchy, Total Contacts in Hierarchy, and Total Value Won Opportunities in Hierarchy.

Campaign Statistics	
Total Responses	3
Total Leads	3
Converted Leads	1
Total Contacts	8
▼ Hierarchy Information	
Total Num Sent in Hierarchy	37,150
Total Responses in Hierarchy	4
Total Leads in Hierarchy	12
Total Contacts in Hierarchy	16
Num Total Opportunities	6
Num Won Opportunities	3
Total Value Opportunities	\$84,163
Total Value Won Opportunities	\$18,333
Total Opportunities in Hierarchy	13
Total Value Opportunities in Hierarchy	\$268,326
Total Won Opportunities in Hierarchy	6
Total Value Won Opportunities in Hierarchy	\$36,666

View Campaign Results by Account

Understand how marketing is impacting the pipeline within a given account. See the opportunities on an account and the campaigns that influenced them using the Campaign Influence related list.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

When you view an account detail page, the Campaign Influence related list shows the opportunities on the account. The list also shows the share of revenue from each opportunity influenced by specific campaigns. A pair of charts shows the revenue influenced by each campaign (1), and the share influenced by each campaign type (2).



To filter the opportunities represented, use the menus above each chart. To see the full list of influenced opportunities along with the share of revenue attributed to each campaign, click **View All**.

The opportunities displayed are based on the default campaign influence model designated by your admin. The Influence by Campaign chart shows results from up to 1000 of your campaigns with the highest revenue shares. This chart combines campaign influence records from deleted campaigns into a separate amount. The Influence by Campaign Type chart shows results from up to 1000 of your campaign types with the highest revenue shares. It's important that each of your campaigns has a unique name so that these charts can be calculated correctly.

If you don't see the Campaign Influence related list, contact your admin. In the Salesforce app, campaign influence records appear without the charts.

EDITIONS

This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

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

USER PERMISSIONS

To view campaign details:

- Read on Campaigns

To view Campaign Influence related list:

- Read on Opportunities

AND

Read access to the Account field on related opportunities

To view campaign influence records:


- Read access to related campaigns, opportunities, and accounts

To view Campaign Influence charts:

- Read access to Type field on campaigns

Report on Campaign Results

Get a better understanding of your campaigns' return on investment by creating reports that combine campaign influence with Opportunities, Campaigns, Contacts, and Accounts.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

Standard Reports

With the Campaigns with Influenced Opportunities (Customizable Campaign Influence) standard report type, you can quickly see the number of opportunities and amount of revenue each campaign has influenced. Stay on top of which campaigns are performing well and make adjustments as needed.

Choose the Campaigns with Influenced Opportunities (Customizable Campaign Influence) standard report type, and the Report Builder creates reports showing each campaign with its opportunities and their value.

The Opportunity Contact Role object and cross filtering are not available in this report.

Custom Report Types

Here are some examples of the custom report types that you can create to see how your campaigns are doing.

- Campaigns with Influenced Opportunities—reports which campaigns drove the most opportunities and had the best return on investment.
- Opportunities with Campaign Influence—reports how much your campaigns influenced your opportunities. Create a separate report for each influence model and add them to a dashboard so you can compare the results in each model.
- Contacts or Accounts with Campaign Influence—reports which contacts or accounts were influenced by campaigns.

Things to Know About Customizable Campaign Influence

Review these details about Customizable Campaign Influence. Learn more about the differences between Customizable Campaign Influence and the original version of Campaign Influence.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

[Understanding Customizable Campaign Influence](#)

By allowing flexible revenue attribution across multiple campaigns, Customizable Campaign Influence offers better business intelligence, more marketing accountability, and improved alignment between sales and marketing.

[What's the Difference Between Campaign Influence and Customizable Campaign Influence?](#)

Customizable Campaign Influence includes several capabilities not found in the original version of Campaign Influence.

EDITIONS

This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

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

USER PERMISSIONS

To create or update custom report types:

- Manage Custom Report Types

To delete custom report types:

- Modify All Data

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Understanding Customizable Campaign Influence

By allowing flexible revenue attribution across multiple campaigns, Customizable Campaign Influence offers better business intelligence, more marketing accountability, and improved alignment between sales and marketing.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

Customizable Campaign Influence lets you set up multiple ways of tracking the influence your campaigns have on opportunities. For each method you want to use, create a separate campaign influence attribution model. To give credit to a campaign for the opportunities it helps generate, your marketing and sales users can add campaign influence records manually. Alternatively, you or your partners can create triggers and processes to add records automatically. On campaign detail pages, your users can see the opportunities generated by a campaign, and the total revenue generated.

EDITIONS

This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

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

Campaign Attribution Models

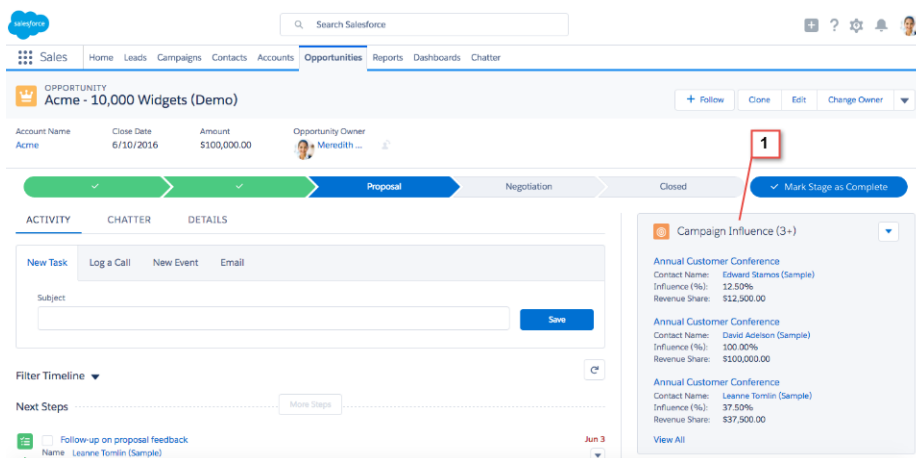
Customizable Campaign Influence includes a Primary Campaign Source revenue attribution model. The Primary Campaign Source model attributes 100% revenue credit to the primary campaign on an opportunity and 0% to any other campaigns that users assign to the opportunity. If you'd like to have more flexibility in how revenue is attributed to campaigns, you or your partners can create custom attribution models.

For example, you could create a model that evenly distributes credit for an opportunity across all campaigns that touched it. You could also create a model that gives 100% credit to the first or last campaign that touched an opportunity. With Customizable Campaign Influence, you can create a model for virtually any scenario that suits your business.

If you'd like to prevent your sales or marketing users from adding or editing campaign influence records, you can lock any of your attribution models. Records for locked models can only be updated via the API. The Primary Campaign Source model is always locked.

Campaign Influence Records

Campaign influence records show which campaigns have influenced a specific opportunity. To let users see which campaigns contributed to their opportunities, add the Campaign Influence related list (1) to your Opportunity page layouts. The Campaign Influence related list only displays records for the attribution model you designate as the default model in Setup. To let your users add and edit campaign influence records from their opportunity detail pages, keep the default model unlocked. Your other attribution models can accrue campaign influence records, but only via triggers, processes, and the API.



The screenshot displays the Salesforce interface for an Opportunity. At the top, there's a search bar and navigation tabs for Sales, Home, Leads, Campaigns, Contacts, Accounts, Opportunities, Reports, Dashboards, and Chatter. The main header shows the Opportunity Name 'Acme - 10,000 Widgets (Demo)' and actions like Follow, Clone, Edit, and Change Owner. Below this, key details are listed: Account Name (Acme), Close Date (6/10/2016), Amount (\$100,000.00), and Opportunity Owner (Meredith...). A progress bar indicates the current stage is 'Proposal', with previous stages 'Closed' and 'Negotiation'. A 'Mark Stage as Complete' button is visible. The 'ACTIVITY' tab is selected, showing options for New Task, Log a Call, New Event, and Email. A 'Filter Timeline' and 'Next Steps' section are also present. On the right, a related list titled 'Campaign Influence (3+)' is shown, containing three records for 'Annual Customer Conference' with varying influence percentages and revenue shares. A red box with the number '1' highlights the 'Campaign Influence (3+)' header.

Depending on your business needs, you can add custom fields to your campaign influence records. For example, if you want to track the order in which campaigns contributed to an opportunity, you could add a number field for that purpose.

Campaign Results

Your users can clearly see how many opportunities a campaign has generated when you add the Influenced Opportunities (1) related list to your Campaign page layouts. The records in the related list are based on the campaign influence model assigned as the default model by the admin.

RELATED **DETAILS**

1

OPPORTUNITY NAME	CLOSE DATE	INFLUENCE (%)	REVENUE SHARE
Acme - 1200 Widgets (Sample)	4/24/2016	33.33%	\$45,662.00
Acme - 10,000 Widgets (Demo)	6/10/2016	12.30%	\$12,300.00
Acme - 200 Widgets (Sample)	8/16/2016	33.34%	\$6,668.00
Global Media - 250 Widgets (Sample)	4/21/2016	33.33%	\$1,666.50
Salesforce.com - 200 Widgets	4/16/2016	90.00%	\$10,000.00
salesforce.com - 200 Widgets (Sample)	8/4/2016	33.33%	\$6,666.00

The Campaign Statistics section (1) of Campaign detail pages shows the revenue generated by the campaign, based on the attribution percentage on the campaign's influence records. The Campaign Statistics section also displays the current number of opportunities generated by the campaign and the total number won.

1

RELATED **DETAILS**

Campaign Statistics

Total Responses	3	Num Total Opportunities	6
Total Leads	3	Num Won Opportunities	3
Converted Leads	1	Total Value Opportunities	\$84,163
Total Contacts	8	Total Value Won Opportunities	\$18,333

Hierarchy Information

Total Num Sent in Hierarchy	37,150	Total Opportunities in Hierarchy	13
Total Responses in Hierarchy	4	Total Value Opportunities in Hierarchy	\$268,326
Total Leads in Hierarchy	12	Total Won Opportunities in Hierarchy	6
Total Contacts in Hierarchy	16	Total Value Won Opportunities in Hierarchy	\$36,666

What's the Difference Between Campaign Influence and Customizable Campaign Influence?

Customizable Campaign Influence includes several capabilities not found in the original version of Campaign Influence.

 **Note:** This information applies only to [Customizable Campaign Influence](#) and not to [Campaign Influence 1.0](#).

Feature	Campaign Influence	Customizable Campaign Influence
Primary Campaign Source model (attributes 100% of revenue to the primary campaign on an opportunity)	✓	✓
Auto-association with opportunities	✓	✓
Multiple Attribution Models		✓
Flexible Influence Attribution		✓
Locked Models		✓
Campaign Influence on Opportunities per Model	✓	✓
Influenced Opportunities on Campaigns per Model		✓
Campaign Results on Campaigns per Model		✓
API Access		✓


EDITIONS

This feature is available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

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

Campaign Influence 1.0

Use the original version of Campaign Influence to understand the return on your campaign investments.

 **Note:** This information applies only to [Campaign Influence 1.0](#) and not to [Customizable Campaign Influence](#).

[Set Up Campaign Influence 1.0](#)

To set up and deploy Customizable Campaign Influence, follow these steps.

[Add Influential Campaigns to Opportunities](#)

Manage lists of campaigns that influence your opportunities directly on opportunity detail pages.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Set Up Campaign Influence 1.0

To set up and deploy Customizable Campaign Influence, follow these steps.

-  **Note:** This information applies only to [Campaign Influence 1.0](#) and not to [Customizable Campaign Influence](#).

[Configure Campaign Influence](#)

[Let Users View Influential Campaigns on Opportunities](#)

Associate multiple influential campaigns to a single opportunity.

Configure Campaign Influence

-  **Note:** This information applies only to [Campaign Influence 1.0](#) and not to [Customizable Campaign Influence](#).

Setting up Campaign Influence

You can configure influential campaigns to be automatically added to opportunities. When automatic association is enabled, influential campaigns are added to opportunities when a campaign is related to a contact that is assigned a contact role on an opportunity prior to the close date of the opportunity. For example, if you have an email campaign with a member who is assigned a contact role on an open opportunity, the email campaign will be added to the Campaign Influence related list for that opportunity.

You can set a Campaign Influence Time Frame that specifies the maximum number of days between the campaign first associated date and the opportunity created date, during which a campaign is considered influential. For example, if you specify a Campaign Influence Time Frame of 15 days and one of your contacts becomes a member of a campaign on June 1, the campaign is considered influential to any opportunity that is created and associated with the contact by June 15. Use the association rules to configure additional criteria that campaigns must meet to be automatically associated to an opportunity.

When automatic association is disabled, users must manually add influential campaigns to opportunities using the [Campaign Influence related list](#).

To set up automatic association for campaign influence:

1. From Setup, enter *Campaign Influence* in the **Quick Find** box, then select **Campaign Influence**.
2. Select **Enabled**.
3. In the **Campaign Influence Time Frame** field, optionally specify the maximum number of days between the campaign first associated date and the opportunity created date.

-  **Note:** Campaigns associated to a contact prior to this time frame will not be considered influential. The maximum campaign influence time frame is 9,999 days. If you do not want to specify a campaign influence time frame, leave the **Campaign Influence Time Frame** field blank.

4. Optionally, define additional filter criteria that must be met in order for a campaign to be automatically associated.
5. Click **Save**.

Campaigns will be automatically added to the Campaign Influence related list on opportunities when they meet the criteria you specified.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up campaign influence:

- Customize application

To disable automatic association for campaign influence:

1. From Setup, enter *Campaign Influence* in the **Quick Find** box, then select **Campaign Influence**.
2. Select **Disabled**.
3. Click **Save**.

Let Users View Influential Campaigns on Opportunities

Associate multiple influential campaigns to a single opportunity.

 **Note:** This information applies only to [Campaign Influence 1.0](#) and not to [Customizable Campaign Influence](#).

If enabled, automatic association will add influential campaigns to opportunities when the campaign is related to a contact that is assigned a contact role on the opportunity prior to the opportunity close date. You can specify additional automatic association criteria, including a campaign influence time frame that limits the amount of time a campaign can influence a new opportunity after the campaign first associated date and before the opportunity created date. Influential campaigns can also be added to opportunities manually by clicking the **Add Campaign** button in the Campaign Influence related list.

1. From the object management settings for Opportunities, go to Page Layouts.
2. Add the [Campaign Influence related list](#) to the opportunities page layout.
3. [Set up campaign influence](#).

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up campaign influence:

- Customize application

To view the campaign influence related list:

- Read on campaigns

AND

Read on opportunities

To manually add influential campaigns:

- Read on campaigns

AND

Edit on opportunities

Add Influential Campaigns to Opportunities


Manage lists of campaigns that influence your opportunities directly on opportunity detail pages.

 **Note:** This information applies only to [Campaign Influence 1.0](#) and not to [Customizable Campaign Influence](#).

Consider these details before adding influential campaigns to your opportunities.

- Though multiple campaigns can be influential, you can designate only one campaign as the primary campaign source on the opportunity.
- The campaign you designate as the primary campaign source will always appear in the Campaign Influence related list.
- The opportunities fields of the campaign statistics section on a campaign detail page will populate for only the campaign you designate as the primary campaign source. For example, you have an email campaign and a telemarketing campaign that both influence the same opportunity, and you designate the email campaign as the primary campaign source. The campaign statistics opportunities fields will populate for only the email campaign.
- When you select `Primary Campaign Source`, the `Primary Campaign Source` field on the opportunity detail page updates with the name of the primary campaign. It's possible that workflow and Apex rules on opportunities can be triggered by this change.
- When you add campaigns using **Add Campaign** in the Campaign Influence related list, campaign member details don't appear in the related list.

Let's now add influential campaigns from the Campaign Influence related list.

1. View the detail page of an opportunity.
2. Click **Add Campaign** in the Campaign Influence related list.
3. Enter a campaign name in the `Campaign name` field or click  to search for a campaign.
4. If you want to designate the campaign as the primary campaign, select `Primary Campaign Source`.
5. Click **Save**.

You can also [configure filter criteria](#) that, when met, will automatically add influential campaigns to opportunities. For example, you can configure a filter to add only email and telemarketing campaigns.

Leads

Track prospects apart from your contacts and opportunities with Salesforce lead records. After you've qualified your lead records, convert them to contacts and create accounts for them (if you don't already have the accounts in Salesforce). And hopefully, create opportunities to bolster your pipeline.

Regardless of whether you're working in Lightning Experience or Salesforce Classic, you work with a list of leads. From the list, you quickly create, locate, and work with the leads you're focusing on at the moment.

Associate relevant events and tasks with those leads. And convert your qualified leads to contacts that have opportunities associated to them. For any lead records that you mark Unqualified, plan to revisit them later to see whether those prospects' needs for your products and services changed.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view the campaign influence related list:

- Read on campaigns
- AND
- Read on opportunities

To manually add influential campaigns:

- Read on campaigns
- AND
- Read and Edit on opportunities

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

[Set Up Leads](#)

Configure campaigns to make them work for your marketing department.

[Manage Leads](#)

View, update, and convert leads as you build your pipeline.

[Things to Know About Leads](#)

Review considerations, guidelines, and tips for leads.

SEE ALSO:

[View and Convert Leads on an Account](#)

Set Up Leads

Configure campaigns to make them work for your marketing department.

[Configure Lead Management](#)

Help your sales teams track prospects and build a strong pipeline of opportunities. Your sales teams use Salesforce leads to work and qualify their prospects with the goal of creating opportunities.

[Define Default Settings for Lead Creation](#)

Optimize lead management features for your sales teams so they can nurture leads efficiently and prevent duplicate records when it's time to convert the leads to contacts, accounts, and opportunities.

[Leads Created from Your Company's Website](#)

Gather information from your company's website and automatically generate up to 500 new leads a day with Web-to-Lead.

[Generate Leads from Your Website for Your Sales Teams](#)

Automatically generate up to 500 leads per day with the prospecting data from your company's website visitors. When you set up Web-to-Lead, Salesforce captures prospects who provide contact information. You can also redirect prospects to other Web pages that are critical to campaign success.

[Generate Leads from LinkedIn Lead Gen Ads](#)

Add another source of leads for your sales team by connecting LinkedIn Lead Gen advertisements to Salesforce. When prospective customers fill out a form on your LinkedIn ad, we convert the data directly to new leads in Salesforce.

[Let Users View and Edit Converted Leads](#)

Assign the "View and Edit Converted Leads" permission to let marketing and sales operations users view converted leads. Users can also edit converted leads.

[Map Custom Lead Fields for Lead Conversion](#)

Get the most out of records created from the leads your sales teams convert when you map custom lead fields to the fields of records they're converted to.

Configure Lead Management

Help your sales teams track prospects and build a strong pipeline of opportunities. Your sales teams use Salesforce leads to work and qualify their prospects with the goal of creating opportunities.

Using leads can give your sales staff instant access to the latest prospects and ensures that no leads are ever dropped. Successful lead management helps sales and marketing manage the inbound lead process, track lead sources, and analyze return on their marketing investment.

From Setup, get started using lead management.

- Go to the object management settings for leads. From the fields section, create custom lead fields that track information specific to your company. Also, map your custom lead fields to account, contact, and opportunity fields so that the data gets converted when users convert leads. Edit the `Lead Status` picklist to choose the default status for new and converted leads.
- Enter `Lead Settings` in the `Quick Find` box, then select **Lead Settings** to specify your default lead settings.
- Enter `Assignment Rules` in the `Quick Find` box, then select **Lead Assignment Rules** to set up lead assignment rules that automatically assign leads.
- Enter `Web-to-Lead` in the `Quick Find` box, then select **Web-to-Lead** to automatically capture leads from your website.
- To let your marketing and sales operations teams edit converted leads, assign those users the "View and Edit Converted Leads" permission.

To create sales queues for leads or custom objects, from Setup, enter `Queues` in the `Quick Find` box, then select **Queues**.

Define Default Settings for Lead Creation

Optimize lead management features for your sales teams so they can nurture leads efficiently and prevent duplicate records when it's time to convert the leads to contacts, accounts, and opportunities.

1. From Setup, enter `Lead Settings` in the `Quick Find` box, then select **Lead Settings**, and then click **Edit**.
2. Define the default lead owner and lead conversion settings.
3. Save your settings.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To change lead settings:

- Customize Application

Leads Created from Your Company's Website


Gather information from your company's website and automatically generate up to 500 new leads a day with Web-to-Lead.

If your company already has a form in which prospects enter their contact information, consider creating a jump page where prospects respond to a campaign. With a little extra HTML code, redirect that information to Salesforce to create leads.

Generate Leads from Your Website for Your Sales Teams

Automatically generate up to 500 leads per day with the prospecting data from your company's website visitors. When you set up Web-to-Lead, Salesforce captures prospects who provide contact information. You can also redirect prospects to other Web pages that are critical to campaign success.

You must have a reCAPTCHA key pair if you want to use spam filtering. Keep in mind that enabling reCAPTCHA is optional.

 **Note:** If you enable reCAPTCHA later, any existing forms without reCAPTCHA keep working and continue to generate leads. We recommend that you regenerate your HTML and update your website with the new code that includes reCAPTCHA validation.

1. From Setup, enter *Web-to-Lead* in the **Quick Find** box, then select **Web-to-Lead**.
2. Click **Edit** to enable or change Web-to-Lead settings.
3. If you want automate email replies to prospects, select a default response template. If you set up response rules to use different email templates based on the information prospects provide, the default response template is used when no auto-response rules apply. Templates must be marked *Available for Use*.
4. Save your changes.
5. To create a form that captures prospect details on your website, click **Create Web-to-Lead Form**, and then select fields you want to include.
6. Select fields to include on your Web-to-Lead form. Use the Add and Remove arrows to move fields between the Available Fields list and the Selected Fields list, and use the Up and Down arrows to change the order of the fields on your form.
 - Select the **Campaign** field.
 - For organizations using multiple currencies, add the **Lead Currency** field if you add currency amount fields, otherwise all amounts will be captured in your corporate currency.
 - Use a custom multi-select picklist to allow potential customers to express interest in several products.
 - For organizations using lead record types, select the **Lead Record Type** field if you want users to select a record type for Web-generated leads.
7. If your organization uses the Translation Workbench or has renamed tabs, select the language for the form labels displayed on your Web-to-Lead form. The source of your Web-to-Lead form is always in your personal language.
8. Specify the complete URL to which users should be directed after they submit their information—for example, your company's home page for a thank you page—and click **Generate**.
9. If you want to add a reCAPTCHA widget to the lead submission form, select **Enable spam filtering (recommended)**.

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up Web-to-Lead:

- **Customize Application**

- Specify the reCAPTCHA API Key Pair using the lookup.
- If you want to allow all traffic in the case that the Google reCAPTCHA servers aren't available, select **Enable server fallback**.

10. Copy the generated HTML code and provide it to your company's webmaster to incorporate into your website.


11. Click **Finished**.

To test the Web-to-Lead form, add the line `<input type="hidden" name="debug" value="1">` to your code. This line redirects you to a debugging page when you submit the form. Remove this line before releasing the Web-to-Lead page to your website.

Leads generated from your website are initially marked with the "default status" specified by the `Lead Status` picklist.

For Web leads generated as part of a campaign, the member status of the new leads is set to the `Member Status` value specified in the form, or to the "default" member status if the `Member Status` field is not included in the form. If you include the `Campaign ID` field on your form, Salesforce automatically inserts the lead as a campaign member, so don't create any triggers or processes that insert campaign members from the generated leads.

In addition, new leads are marked as "Unread," and are changed to "Read" when viewed or edited by the lead owner. Users can select the My Unread Leads list view to quickly locate their new leads.

 **Note:** The format for date and currency fields captured online is taken from your organization's default settings - `Default Locale` and `Currency Locale`.

The daily limit for Web-to-Lead requests is 500. If your organization exceeds its daily Web-to-Lead limit, the Default Lead Creator (specified in the Web-to-Lead setup page) receives an email containing the additional lead information. See [How many leads can we capture from our website?](#) on page 92 for additional information on Web-to-Lead limits.

If a new lead cannot be generated due to errors in your Web-to-Lead setup, Customer Support is notified of the problem so that we can help you correct it.

Salesforce runs field validation rules before creating records submitted via Web-to-Lead and only creates records that have valid values.

All universally required fields must have a value before a record can be created via Web-to-Lead.

Salesforce doesn't support rich text area (RTA) fields on Web-to-Lead forms. If you use RTA fields on your forms, any information entered in them is saved as plain text when the lead is created.

Generate Leads from LinkedIn Lead Gen Ads

Add another source of leads for your sales team by connecting LinkedIn Lead Gen advertisements to Salesforce. When prospective customers fill out a form on your LinkedIn ad, we convert the data directly to new leads in Salesforce.

Assign the new leads to the user or queue you choose. You can add up to 500 leads from LinkedIn per day. If the number exceeds the limit, we email the additional leads to the default lead creator you designate in Setup.

1. From Setup, enter *LinkedIn Lead Gen* in the Quick Find box. Then click **LinkedIn Accounts**.

2. Connect a LinkedIn account to your Salesforce org.

Salesforce connects the ad accounts associated with this member account to your org. All forms associated with these ad accounts generate leads in Salesforce. We recommend using a LinkedIn account that is associated with your company rather than an account that's owned by a single employee.

3. Set up default values for leads from LinkedIn. From Setup, enter *LinkedIn Lead Gen* in the Quick Find box. Then click **Lead Gen Fields**.

EDITIONS

Available in: Lightning Experience

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

4. Under Set Lead Defaults, enter values for the Default Lead Creator, Record Type, and Lead Source for leads generated from LinkedIn.
5. Under Map Form Data, choose lead fields to receive the data from LinkedIn about the form each lead comes from.
6. Under Map Lead Fields, choose lead fields to receive the data from LinkedIn about each lead.
7. Under Map LinkedIn Questions to Custom fields, choose custom lead fields to capture data from your LinkedIn custom form questions. LinkedIn Lead Gen forms let you ask up to 3 custom questions of your leads. For example, you might ask what their occupation is. When LinkedIn sends leads to Salesforce, it includes the text of each question and answer. Use a lead field to store each question and another for the answer provided by the lead. This way you can report on questions and answers by filtering leads by questions asked, using the fields you choose for the questions.

Let Users View and Edit Converted Leads

Assign the "View and Edit Converted Leads" permission to let marketing and sales operations users view converted leads. Users can also edit converted leads.

1. From Setup, enter Permission Sets. Click **Permission Sets**.
2. Click New.
3. Enter a name for the permission set. Click Save.
4. Click **App Permissions**.
5. Click Edit.
6. Under Sales, select the View and Edit Converted LEads permission.
7. Save the permission set.
8. From Setup, enter Users. Click **Users**.
9. Click the user you want to assign the new permission set to.
10. Scroll to the Permission Sets related list and then click **Edit Assignments**.
11. Assign the permission set to the user and click Save.

The locations where converted leads appear depends on the interface you are using.

Where can I see converted leads?	Lightning Experience	Salesforce Classic	The Salesforce App
Recent Items list		✓	
Recent Records list in the Global Navigation tab	✓		
Global Search Results	✓	✓	
Global Search Most Recently Used list	✓		
Recently Viewed list views	✓	✓	✓
Campaign Member related list (only leads added after conversion)	✓	✓	
Custom Lead lookup fields	✓	✓	✓
Lead reports	✓	✓	✓
Recent Records on Home page	✓		

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To assign a permission set to users:

- Assign Permission Sets


Users can't unconvert leads.

Map Custom Lead Fields for Lead Conversion

Get the most out of records created from the leads your sales teams convert when you map custom lead fields to the fields of records they're converted to.

When sales reps convert qualified leads, the information from the standard lead fields appears in standard fields for contact, account, and opportunity records. If you set up custom lead fields, you specify how that custom information converts to custom fields in accounts, contacts, and opportunities.

1. From the object management settings for leads, go to the fields section, then click **Map Lead Fields**.
2. For each custom lead field, choose a custom account, contact, or opportunity field into which you want the information inserted when you convert a lead. In Lightning Experience, a custom lead field can map to account, contact, and opportunity fields at the same time.
3. Save your work.

 **Note:** In Lightning Experience and Salesforce Classic, custom field mapping for lead conversion is available in orgs that use APEX Lead Convert, and not in orgs that use the older PLSQL Lead Convert.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

USER PERMISSIONS

To map lead fields:

- Customize Application

Manage Leads

View, update, and convert leads as you build your pipeline.

[Leads Home](#)

[Displaying and Editing Leads](#)

[Convert Qualified Leads](#)

Keep the sales process moving when you qualify a lead and then convert it to a contact. Relate that contact to either an existing account in Salesforce, or an account that you create. And if the lead you're converting results in a deal that looks promising, create an opportunity record at the same time.

[Merge Duplicate Leads](#)

Keep your records clean and free of duplicates so you can reach more customers and maintain better relationships with them.

[Update Leads with Third-Party Data](#)

Your Salesforce admin can set up features for comparing your leads to records from Lightning Data or Data.com. Depending on the way your admin sets up these features, your leads are updated when information changes, and you can also review and update leads manually.

[Reassign Leads from a Queue](#)

Accepting leads from a queue is an easy way to reassign leads to yourself.

[Lead Sharing in Salesforce Classic](#)


Extend sharing privileges beyond the basic sharing model for your own data on a lead-by-lead basis.

Leads Home

Clicking on the Leads tab displays the leads home page.

- In the **Lead Views** section, select a list view from the drop-down list to go directly to that list page, or click **Create New View** to define your own custom view.

To view the leads in a queue, choose that queue list from the drop-down list. For every queue your administrator creates, Salesforce adds a corresponding queue list view.

-  **Note:** The org-wide sharing model for an object determines the access users have to that object's records in queues:

Public Read/Write/Transfer

Users can view and take ownership of records from any queue.

Public Read/Write or Public Read Only

Users can view any queue but only take ownership of records from queues of which they are a member or, depending on sharing settings, if they are higher in the role or territory hierarchy than a queue member.

Private

Users can only view and accept records from queues of which they are a member or, depending on sharing settings, if they are higher in the role or territory hierarchy than a queue member.

Regardless of the sharing model, users must have the "Edit" permission to take ownership of records in queues of which they are a member. Salesforce admins, users with the "Modify All" object-level permission for Cases or Leads, and users with the "Modify All Data" permission, can view and take records from any Case or Lead queue regardless of their membership in the queue.

- In the **Recent Leads** section, select an item from the drop-down list to display a brief list of the top leads matching that criteria. From the list, you can click any lead name to go directly to the lead detail. Toggle the **Show 25 items** and **Show 10 items** links to change the number of items that display. The fields you see are determined by the "Leads Tab" search layout defined by your administrator and by your field-level security settings (available in Professional, Enterprise, Unlimited, Performance, and Developer Editions). The Recent Leads choices are:

Recent Leads Choice	Description
My Unread Leads	The last ten or twenty-five leads assigned to you which you have not yet viewed or edited. This list only includes records owned by you.
Recently Viewed	The last ten or twenty-five leads you viewed, with the most recently viewed lead listed first. This list is derived from your recent items and includes records owned by you and other users.
Recently Created	The last ten or twenty-five leads you created, with the most recently created lead listed first. This list only includes records owned by you.

- If Quick Create has been enabled by your administrator, you can add a new lead from the **Quick Create** area in the sidebar on the leads homepage. Alternatively, click **New** next to the **Recent Leads** section to create a new lead.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view Leads tab:

- Read on leads

To view leads:

- Read on leads

To create leads:

- Create on leads

- Under **Reports**, click any report name to jump to that report.
- In the **Summary** section, choose values and click **Run Report** to view a summary list of your leads.
- Select any of the links under **Tools** to manage your leads.
- If leads are shared with external contacts via Salesforce to Salesforce, choose one of the list views under **Leads from Connections** to view leads that your business partners have shared with you.


Displaying and Editing Leads

Displaying Leads

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


Editing Lead Details

To update a lead, click **Edit**, and then change the fields you want to update. Optionally, select the `Assign using active assignment rule` checkbox below the lead detail to automatically reassign it using the active lead assignment rule. If the `Assign using active assignment rule` checkbox is selected and no assignment rule criteria is met, the lead is assigned to the Default Lead Owner. When you have finished, click **Save**. You can also click **Save & New** to save the current lead and create another.

 **Note:** Open activities associated with a lead are not reassigned using the active lead assignment rule; to reassign a lead and its open activities, assign the lead to a new owner.

Editing Leads in List Views

To update more than one lead from a list view, select the leads you want to edit and then double-click the field value you want to change.

 **Note:** When updating Lead Statuses from a list view, all Lead Status values are available, even if your admin has created a Lead-based process that limits the available statuses. To limit the available statuses to those supported by your lead process, update the Lead Status from the lead details page.

Viewing Lead Updates and Comments (Chatter)


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

Viewing Your Leads' Social Information

Use the Social Accounts and Contacts feature to view your leads' social network profiles, see their level of influence in social media, and watch related YouTube videos.

Lead Related Lists

The lower portion of the display provides information related to the lead, including activities, notes, attachments, and any campaigns associated with the lead. The related lists you see are determined by your personal customization, and by any customization your administrator has made to page layouts or your permissions to view related data. You can click individual items to display additional detail. Click **more** at the bottom of the page to display more items in the related lists.

 **Note:** Hover over the links at the top of a detail page to display the corresponding related list and its records. If Chatter is enabled, hover links display below the feed. An interactive overlay allows you to quickly view and manage the related list items. Click a hover link to jump to the content of the related list. If hover links are not enabled, contact your Salesforce administrator.

Sharing

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, share a lead with other users, groups, or roles by clicking **Sharing**. See [Lead Sharing in Salesforce Classic](#) on page 76.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view leads:

- Read on leads

To change leads:

- Edit on leads

Printing Leads

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

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

Convert Qualified Leads

Keep the sales process moving when you qualify a lead and then convert it to a contact. Relate that contact to either an existing account in Salesforce, or an account that you create. And if the lead you're converting results in a deal that looks promising, create an opportunity record at the same time.


 [Watch a Demo](#) (English only)

When you convert leads to contacts or accounts, the process sometimes creates duplicate records. If so, we show you a warning (custom warnings set up by your administrator do not appear during lead conversion). When you begin to convert a lead, possible matches appear based on matching rules using standard fields. When you click **Convert**, additional matches may appear based on matching rules using custom fields. How these duplicate records are handled depends on how your administrator has set up Apex Lead Convert and Duplicate Management. For example, your administrator can require that you resolve the duplicates before you finish converting.

Keep in mind that you can't reverse lead conversion. Once converted, a lead record is no longer searchable, unless your admin has assigned you the "View and Edit Converted Leads" permission. The new account, contact, or opportunity record created from the converted lead is searchable. In Lightning Experience, both the converted lead record and the new record based on the converted lead are searchable. However, you can't view or edit the converted lead record from the search results page.

When converting a lead, attached files or notes become attached to the contact, account, and opportunity records you associate with the converted lead.

1. In a lead record, choose to convert the lead.
2. Select an account, or enter a name for an account that you're creating.
3. *Salesforce Classic only:* If you update a person account, select the option to overwrite the lead source in the person account with the value from the lead.
4. Select a contact, or enter a name for a contact that you're creating.
5. Select an opportunity, or enter a name for an opportunity that you're creating.
6. Convert the lead.
7. Optionally, create a follow-up task.

 **Note:** Some long-time Salesforce customers are still using an older lead convert process built with PLSQL instead of Apex. If your org uses Lightning Experience and the old lead convert process, the convert window has fewer options. To use the newest lead conversion window, your org must have enabled Apex Lead Convert. With its increased capability, flexibility, and efficiency, the newest lead convert window is a great reason to make the free switch to Apex Lead Convert. To enable Apex Lead Convert, see this [Knowledge article](#) and then contact Salesforce Support.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To convert leads:

- Create and Edit on leads, accounts, contacts, and opportunities
- AND
- Convert Leads

To avoid creating duplicate records when converting leads:

- Require Validation for Converted Leads

Merge Duplicate Leads

Keep your records clean and free of duplicates so you can reach more customers and maintain better relationships with them.

[Things to Know About Merging Duplicate Leads](#)

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

[Merge Duplicate Leads in Lightning Experience](#)

Work only the prospects that matter. Merge duplicate leads using Lightning Experience.

[Merge Duplicate Leads in Salesforce Classic](#)

Work only the prospects that matter. Merge duplicate leads using Salesforce Classic.

Things to Know About Merging Duplicate Leads

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

Campaigns

When duplicate leads that are members of different campaigns are merged, Salesforce retains the campaign Member Status Updated date for each campaign the merged lead is a member of.

Related Items, Chatter Feeds, and Attachments

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

Hidden and Read-Only Fields

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

Non-Master Leads

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Merge Duplicate Leads in Lightning Experience

Work only the prospects that matter. Merge duplicate leads using Lightning Experience.

1. Choose a lead record. A message tells you if duplicates exist for that record. To see them, click **View Duplicates**.
2. Choose up to three lead records to merge. Click **Next**.

Potential Duplicate Records

View Duplicates

To merge duplicates, choose up to 3 leads. Then click Next and choose the fields to keep.

∨ Leads (2)

NAME	TITLE	COMPANY	PHONE	EMAIL	LEAD STATUS	OWNER ALIAS
<input checked="" type="checkbox"/> Susan Lee	CTO	Acme	800-555-1212		New	rlvins
<input checked="" type="checkbox"/> Suzanne Lee	Chief Tech Officer	Acme	800-555-1212		New	rlvins

These duplicates can't be merged with leads.

∨ Contacts (1)

NAME	ACCOUNT NAME	PHONE	EMAIL	CONTACT OWNER ALIAS
Susan Lee	Acme	800-555-1212		rlvins

Next

3. Choose one lead record as the master, and choose the field values that you want to keep. Click **Next**.

Potential Duplicate Records

Compare Leads

When you merge, the master record is updated with the values you choose, and relationships to other items are shifted to the master record.

	Susan Lee Select All	Suzanne Lee Select All
MASTER RECORD	<input type="radio"/> Use as master	<input checked="" type="radio"/> Use as master
NAME	<input type="radio"/> Susan Lee	<input checked="" type="radio"/> Suzanne Lee
COMPANY	<input checked="" type="radio"/> Acme Inc.	<input type="radio"/> Acme
TITLE	<input checked="" type="radio"/> CTO	<input type="radio"/> Chief Tech Officer
CREATED DATE	8/16/2017 5:26 PM	8/16/2017 5:26 PM
LAST MODIFIED DATE	8/23/2017 4:54 PM	8/23/2017 2:45 PM

Showing fields with different values. [Show All Fields](#)

Back **Next**

4. Confirm your choices and merge.

EDITIONS

Available in: Lightning Experience

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

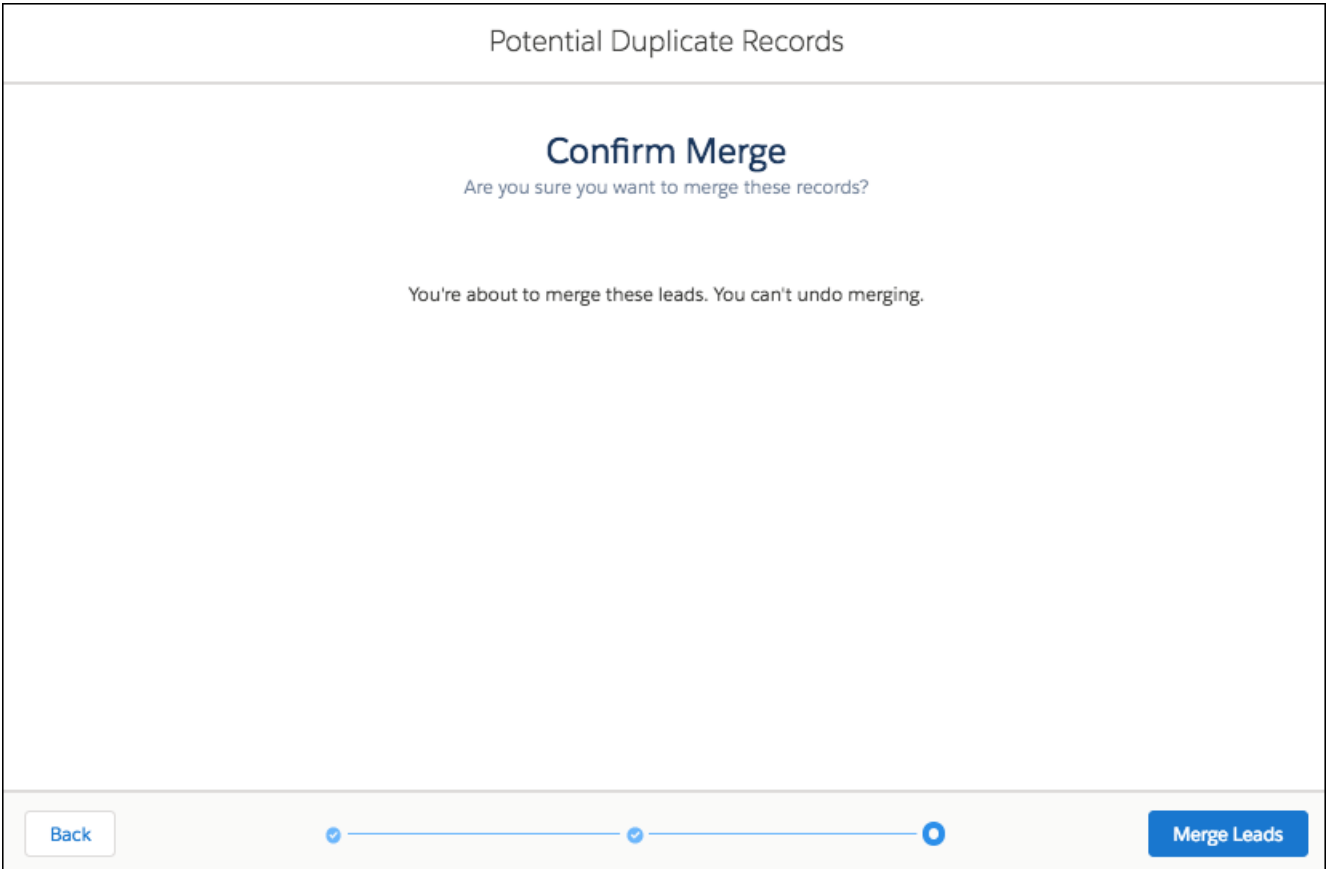
USER PERMISSIONS

To view leads:

- Read on leads

To merge leads:

- Delete on leads



Merge Duplicate Leads in Salesforce Classic

Work only the prospects that matter. Merge duplicate leads using Salesforce Classic.

1. Select a lead record.
2. Click **Find Duplicates**.
3. Select up to three leads in the matching leads list that you want to merge.

If you want, enter a new lead name or company and click **Search** to find another lead to merge. Salesforce performs a phrase search for matches in the `Name` and `Company` fields. It also considers an implied wildcard after any entry. Search results include matches for any fields you enter. For example, you enter *Bob Jones* who works at *Acme*. Search results include anyone named *Bob Jones* at any company and any lead with *Acme* as a company.

4. Click **Merge Leads**.
5. Select one lead as the “Master Record.” Salesforce retains any data from hidden or read-only fields in the Master Record. If you have the “Edit Read Only Fields” permission, you can select which read-only fields to retain. Hidden fields don’t appear during the merge process.
6. Select the fields that you want to retain from each record.
7. Click **Merge**.
8. Click **OK**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view leads:

- Read on leads

To merge leads:

- Delete on leads

Update Leads with Third-Party Data

Your Salesforce admin can set up features for comparing your leads to records from Lightning Data or Data.com. Depending on the way your admin sets up these features, your leads are updated when information changes, and you can also review and update leads manually.

SEE ALSO:

[Use Third-Party Data to Update and Add Records to Salesforce](#)

[AppExchange: Lightning Data](#)

Reassign Leads from a Queue

Accepting leads from a queue is an easy way to reassign leads to yourself.

1. Go to a list view that shows a lead queue. If you don't see a lead queue, ask your admin to add you as queue member.
2. Select the leads you want to own.
3. Click **Accept**.

To reassign a single lead from a queue, go to the record detail page and change the record owner.

Lead Sharing in Salesforce Classic

Extend sharing privileges beyond the basic sharing model for your own data on a lead-by-lead basis.

Your administrator defines the sharing model for your company. And if that sharing model for leads is Private or Public Read Only, you can use lead sharing to increase access to your leads. You cannot, however, restrict access beyond your company's default access levels.

You can see sharing details when you click **Sharing** on the lead detail page.

Things to Know About Leads

Review considerations, guidelines, and tips for leads.

[Guidelines for Creating Leads](#)

Get some guidance when you manually create leads to track your prospects.

[Considerations for Converting Leads](#)

Learn what happens to qualified leads when you convert them to accounts, contacts, and opportunities.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To change or accept ownership of leads from a queue:

- Edit on leads

EDITIONS

Available in: Salesforce Classic

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

[Things to Know About Merging Duplicate Leads](#)

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

[Considerations for Deleting Leads](#)

Know what happens to the records associated with the leads you delete.

[Lead Fields](#)

[Lead Conversion Field Mapping](#)

Learn how lead fields convert to contact, account, person account, and opportunity fields when you convert a lead.

[Guidelines for Mapping Custom Lead Fields for Lead Conversion](#)

Learn the best practices for mapping custom lead fields to custom fields in contacts, accounts, and opportunities. Mapping custom fields helps your sales reps retain that important information when they convert qualified leads to track new potential deals.

[Guidelines for Setting Up Web-to-Lead](#)

Get Salesforce ready to gather information from your company's website and automatically generate up to 500 new leads a day.

[Leads FAQs](#)

Guidelines for Creating Leads

Get some guidance when you manually create leads to track your prospects.

- From the Leads tab, you can automatically assign the lead using the active lead assignment rule. To do so, select **Assign using active assignment rules**. Otherwise, the lead belongs to you.

If you automatically assign the new lead, the record type of the lead can change, depending on the behavior your admin specified for assignment rules.

- If your sales team uses divisions (Salesforce Classic only), the division of a new lead is automatically set to your default division, unless you manually select a different one.
- Your admin determines the default lead status for new leads.
- The lead is marked **Read** and doesn't appear in the **My Unread Leads** list view. In Salesforce Classic, if you click **Save & New**, the lead is marked **Unread**.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Considerations for Converting Leads

Learn what happens to qualified leads when you convert them to accounts, contacts, and opportunities.

When you convert qualified leads, Salesforce moves any campaign members to the new contacts. The leads become read-only records, unless your administrator gives you permission to edit them. If existing accounts and contacts share the names specified on the leads, you can choose to update the existing accounts and contacts. Salesforce adds information from the lead into empty fields; Salesforce does not overwrite existing account and contact data.

All open and closed activities from the leads are attached to the accounts, contacts, and opportunities. You can assign the owners of these new records, and schedule follow-up tasks. When you assign new owners, only the open activities are assigned to the new owner. If you have custom lead fields, that information can be inserted into custom account, contact, or opportunity fields.

Your admin can also set up your custom lead fields to populate custom account, contact, and opportunity fields automatically. You can't view converted leads, unless your admin has assigned you the "View and Edit Converted Leads" permission. However, converted leads

EDITIONS

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do appear in lead reports. Salesforce updates the `Last Modified Date` and `Last Modified By` system fields on converted leads when picklist values included on converted leads are changed.

Campaigns	<p>If the lead matches an existing contact and both records are linked to the same campaign, the campaign member status is determined by whichever is further along in the lifecycle of the campaign. For example, if the lead member status is "sent" and the contact member status is "responded," the responded value is applied to the contact.</p> <p>Related campaign information is always associated with the new contact record, regardless of the user's sharing access to the campaign.</p> <p>When more than one campaign is associated with a lead, the most recently associated campaign is applied to the <code>Primary Campaign Source</code> field on the opportunity, regardless of the user's sharing access to the campaign.</p>
Chatter	<p>When you convert a lead to an existing account, you don't automatically follow that account. However, when you convert the lead to a new account, you automatically follow the new account, unless you disabled feed tracking for accounts in your Chatter settings.</p>
Data.com / D&B Company	<p>If you use Data.com Premium, when you add a lead from Data.com, a corresponding D&B Company record (if one exists in Data.com) is automatically created in Salesforce and linked to the lead record via its <code>D&B Company</code> field. If you later convert that lead:</p> <ul style="list-style-type: none"> • And if the account is created from the conversion, the lead's <code>Company D-U-N-S Number</code> field value transfers to the account's <code>D-U-N-S Number</code> field, and the lead's <code>D&B Company</code> field value transfers to the account's <code>D&B Company</code> field. • Its <code>Data.com Key</code> field value transfers to the contact's <code>Data.com Key</code> field. <p>If you use Data.com Corporate, no D&B Company record is created, but the lead's <code>Data.com Key</code> field value transfers to the contact's <code>Data.com Key</code> field.</p>
Divisions	<p>The new account, contact, and opportunity are assigned to the same division as the lead. If you update an existing account during lead conversion, the account's division is not changed, and the new contact and opportunity inherit the account's division.</p>
Duplicate Management	<p>When you convert leads to contacts or accounts, the process sometimes creates duplicate records. If so, we show you a warning (custom warnings set up by your administrator do not appear during lead conversion). When you begin to convert a lead, possible matches appear based on matching rules using standard fields. When you click Convert, additional matches may appear based on matching rules using custom fields. How these duplicate records are handled depends on how your administrator has set up Apex Lead Convert and Duplicate Management. For example, your administrator can require that you resolve the duplicates before you finish converting.</p>
Enterprise Territory Management	<p>Filter-based opportunity territory assignment is not triggered when an opportunity is created through lead conversion.</p>
New Accounts and Contacts	<p>When <i>new</i> accounts or contacts are created during lead conversion, the values of mapped lead fields <i>overwrite</i> the default values of the mapped account and contact fields.</p>
Existing Accounts and Contacts	<p>When updating <i>existing</i> accounts or contacts during lead conversion, the values of mapped lead fields <i>do not</i> overwrite the values of the mapped account and contact fields.</p>
Local Lead Names	<p><code>Company Name (Local)</code> on the lead automatically maps to <code>Account Name (Local)</code>, along with their associated standard name fields.</p>

Person Accounts	<p>With person accounts enabled, you can convert leads to either person accounts or business accounts. Leads that don't have a value in the <code>Company</code> field are converted to person accounts. Leads that do have a value in the <code>Company</code> field are converted to business account.</p> <p>We recommend that you use different lead record types and page layouts to differentiate leads that convert to person accounts from those that convert to business accounts. Specifically, remove the <code>Company</code> field from the page layouts for leads that convert to person accounts. Then, make the <code>Company</code> field required on the page layouts for leads that convert to business accounts.</p> <p>If you convert a lead and attach it to a person account that someone else owns, that person account owner becomes the contact owner.</p> <p>If you convert a lead that someone else owns and attach it to a person account that you own, the lead owner becomes the contact owner.</p>
Record Types	<p>If the lead has a record type, the default record type of the user converting the lead is assigned to records created during lead conversion.</p> <p>The default record type of the user converting the lead determines the lead source values available during conversion. If the desired lead source values are not available, add the values to the default record type of the user converting the lead.</p>
Salesforce to Salesforce	<p>When you convert a lead, Salesforce to Salesforce inactivates the shared record and updates the External Sharing related list in your connection's lead record with an Inactive (converted) status. Due to inactivation of the shared record, changes to the Lead Status during conversion aren't reflected in your connection's lead record.</p>
Search	<p>Once converted, a lead record is no longer searchable in Salesforce Classic. However, the new account, contact, or opportunity record created from the converted lead is searchable. In Lightning Experience, both the converted lead record and the new record based on the converted lead are searchable; however, you can't access the converted lead record to view or edit from the search results page.</p>
Standard and Custom Lead Fields	<p>The system automatically maps standard lead fields to standard account, contact, and opportunity fields.</p> <p>For custom lead fields, your administrator can specify how they map to custom account, contact, and opportunity fields.</p> <p>The system assigns the default picklist values for the account, contact, and opportunity when mapping standard lead picklist fields that are blank. If your organization uses record types, blank values are replaced with the default picklist values of the new record owner.</p>
Territory Management	<p>If your organization uses territory management, account assignment rules evaluate the new account and can assign it to one or more territories. If the rules assign the account to exactly one territory, then the opportunity is also assigned to that territory. If the rules assign the account to multiple territories, then the opportunity is not assigned to any territory.</p>
Apex Triggers	<p>During lead conversion, triggers fire. Universally required custom fields and validation rules are enforced.</p> <p>When updating a lead, triggers that cause the lead to convert can cause a warning. The warning tells the user that the lead is no longer accessible to them. The lead is inaccessible because it has been converted to a contact. Refer to the new contact instead.</p> <p>If the <code>Require Validation for Converted Leads</code> checkbox on the Lead Settings page is deselected, Salesforce ignores lookup filters when converting leads.</p>

Workflow You can't convert a lead that's associated with an active approval process or has pending workflow actions. Converting a lead to a person account won't trigger workflow rules.

When a lead is converted by someone who isn't the lead owner, all workflow tasks associated with the lead that are assigned to that user, except email alerts, are reassigned to the lead owner. Workflow tasks assigned to users other than the lead owner and lead converter aren't changed.

If validation and triggers for lead convert are enabled, then converting a lead can trigger a workflow action on a lead. For example, if there's an active workflow rule that either updates a lead field or transfers the owner of a lead, that rule can trigger when the lead is converted, even if the lead isn't visible on the Leads tab as a result of the conversion. Allow the workflow process to finish before updating lead fields, otherwise save or lead convert fails. If a workflow rule creates a task as a result of a lead conversion, the task is assigned to the newly created contact and related to the associated account or opportunity.

When you convert a lead, files and related records attached to the lead are attached to the resulting contact, account, and opportunity records. Items from the following related lists on leads are carried over to the new or existing contact, account, and opportunity during lead conversion.

Lead Related List	Contact	Account	Person Account	Opportunity
Open Activities	✓	✓	✓	✓
Activity History	✓	✓	✓	✓
Campaign History	✓		✓	
HTML Email Status	✓		✓	
Notes and Attachments	✓		✓	
Files	✓	✓	✓	✓
Notes (new)	✓	✓	✓	
Content Deliveries	✓			
Social Posts	✓		✓	
Social Personas	✓		✓	
Marketing Actions	✓		✓	

Things to Know About Merging Duplicate Leads

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

Campaigns

When duplicate leads that are members of different campaigns are merged, Salesforce retains the campaign Member Status Updated date for each campaign the merged lead is a member of.

Related Items, Chatter Feeds, and Attachments

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

Hidden and Read-Only Fields

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

Non-Master Leads

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

Considerations for Deleting Leads

Know what happens to the records associated with the leads you delete.

When you delete a lead, the lead record moves to the Recycle Bin. Associated notes, attachments, and activities are deleted along with the lead. If you restore the lead, any associated notes, attachments, and activities are also restored.

Lead Fields

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

If the lead record was added from Data.com, certain fields, as identified here, will be populated with the Data.com or Dun & Bradstreet (D&B) value, if a value is available. Some Data.com lead fields are available only to organizations that use a specific Data.com product.

Field	Description	Accepts Data.com or D&B Value
Address	Street address for the lead, for example, 475 Boardwalk Ave. Up to 255 characters are allowed in this field.	✓ (Data.com)

EDITIONS

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Field	Description	Accepts Data.com or D&B Value
Annual Revenue	Amount of annual revenue at lead's company.	✔ (D&B)
Campaign	Name of the campaign responsible for generating the lead. Displays only when creating a new lead. Data entered in this field is stored in the Campaign History related list on the lead.	
City	City portion of the lead's address, for example, San Francisco. Up to 40 characters are allowed in this field.	✔ (Data.com)
Clean Status	The record's clean status, as compared with Data.com. Values are Not Compared, In Sync, Reviewed, Different, Not Found, and Inactive. This field is available if you use Data.com Prospector or Data.com Clean.	✔ (Data.com)
Company	Name of company with which lead is affiliated. Up to 255 characters are allowed in this field.	✔ (D&B)
Company D-U-N-S Number	Data Universal Numbering System (D-U-N-S) number is a unique, nine-digit number assigned to every business location in the D&B database that has a unique, separate, and distinct operation. D-U-N-S numbers are used by industries and organizations around the world as a global standard for business identification and tracking. This field is available if you use Data.com Prospector or Data.com Clean.  Note: To see the entire D-U-N-S number, either <ul style="list-style-type: none"> • Add the lead to Salesforce if you haven't yet, or • Clean the lead with Data.com if it already exists in Salesforce Until you add or clean the record, its first five digits will be masked with asterisks (*).	✔ (D&B)
Company Name (Local)	Name of the company in the local language.	
Country	Country portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	
Created By	User who created the lead, including creation date and time. (Read only)	
D&B Company	A link to the corresponding D&B Company record, which displays Dun & Bradstreet (D&B) fields for the lead. Use the lookup if you need to associate a different D&B Company record with the lead. This field is only available to organizations that use Data.com Prospector or Data.com Clean.	✔ (D&B)
Data.com Key	The company's ID in Data.com. When Salesforce records are compared with Data.com records (via manual cleaning or automated clean jobs), if Data.com finds a match, the two records are linked by this field's numeric value.	✔ (Data.com)

Field	Description	Accepts Data.com or D&B Value
Description	Description of the lead. Up to 32KB of data are allowed in this field. Only the first 255 characters appear in reports.	
Do Not Call	Whether the contact wants to be contacted by phone. If you use Data.com, the <code>Phone</code> field value is hidden from search results and on the Contact Card, and it's blank in <code>.csv</code> files that are created when you export records.	
Email	Email address of lead. Must be a valid email address in the form: <code>jsmith@acme.com</code> . Up to 80 characters are allowed in this field. Click the email address in this field to send an email using your personal email application. If the Gmail Buttons and Links feature is enabled, you can click the Gmail link next to the field to send an email from your Gmail account. See Gmail™ in Salesforce for more information.	✔ (Data.com)
Email Opt Out	Whether the contact wants to receive email. If you use Data.com, the <code>Email</code> field value is hidden from search results and on the Contact Card, and it's blank in <code>.csv</code> files that are created when you export records.	
Fax	Lead's fax number. Up to 40 characters are allowed in this field.	
Fax Opt Out	Lead has not requested to be included in broadcast faxes.	
First Name	First name of the lead, as displayed on the lead edit page. Up to 40 characters are allowed in this field.	✔ (Data.com)
First Name (Local)	First name of the lead translated into the local language.	
Industry	Primary business of lead's company. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	✔ (Data.com)
Last Name	Last name of the lead, as displayed on the lead edit page. Up to 80 characters are allowed in this field.	✔ (Data.com)
Last Name (Local)	Last name of the lead translated into the local language.	
Last Transfer Date	The date the lead owner was last changed.	
Lead Currency	The default currency for all currency amount fields in the lead. Amounts display in the lead currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.	
Lead Division	Division to which the lead belongs. Available only in organizations that use divisions to segment their data.	
Lead Owner	Assigned owner of the lead.	
Lead Record Type	Name of the field that determines what picklist values are available for the record. The record type may be associated with a lead process.	

Field	Description	Accepts Data.com or D&B Value
	Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.	
Lead Source	Source of lead, for example, Advertisement, Partner, or Web. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	✔ (Data.com)
Lead Status	Status of the lead, for example, Open, Contacted, Qualified. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Middle Name	Middle name of the lead, as displayed on the lead edit page. Up to 40 characters are allowed for this field.  Note: To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User Interface</i> in the Quick Find box, then select User Interface . Then select Enable Name Suffixes for Person Names .	
Middle Name (Local)	Middle name of the lead translated into the local language.  Note: To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User Interface</i> in the Quick Find box, then select User Interface . Then select Enable Name Suffixes for Person Names .	
Mobile	Cellular or mobile phone number. Up to 40 characters are allowed in this field.	
Modified By	User who last changed the lead fields, including modification date and time. This does not track changes made to any of the related list items on the lead. (Read only)	
Name	Combined first name, middle name (beta), last name, and suffix (beta) of lead, as displayed on lead detail page.	✔ (Data.com)
No. of Employees	Number of employees at the lead's company.	✔ (D&B)
Phone	Lead's primary phone number. Up to 40 characters are allowed in this field.	✔ (Data.com)
Partner Account	Read-only field that indicates the lead is owned by a partner user.	
Rating	Indicates value or prospect of the lead, for example, Hot, Warm, Cold. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Read	Flag indicating that the lead has been viewed or edited by the lead owner. Flag is not displayed on lead edit or detail pages. Leads marked as "Read" do not contain a check mark in the Unread column on leads list views.	

Field	Description	Accepts Data.com or D&B Value
Salutation	Title for addressing the lead, for example, Mr., Ms., Dr., or Prof. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
State/Province	State or province portion of user's address. Entry is selected from a picklist of standard values, or entered as text. Up to 80 characters are allowed if the field is a text field.	
Suffix	Name suffix of the lead, as displayed on the lead edit page. Up to 40 characters are allowed for this field.  Note: To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User Interface</i> in the Quick Find box, then select User Interface . Then select Enable Name Suffixes for Person Names .	
Title	Position of lead within his or her company. Up to 80 characters are allowed in this field.	✔ (Data.com)
Unread	Flag indicating that the lead has not been viewed or edited by the lead owner. Flag is not displayed on lead edit or detail pages. Leads marked as "Unread" contain a check mark in the Unread column on leads list views.	
Custom Links	Listing of custom links for leads as set up by your administrator.	
Website	URL of company's website, for example, www.acme.com. Up to 255 characters are allowed in this field; only the first 50 are displayed.	
ZIP	ZIP code or postal code portion of the lead's address. Up to 20 characters are allowed in this field.	✔ (Data.com)

Lead Conversion Field Mapping

Learn how lead fields convert to contact, account, person account, and opportunity fields when you convert a lead.

When you convert lead records, standard lead fields map to contact, account, person account, and opportunity fields. If you use custom fields, your admin specifies the fields that they map to in your newly created records.

Lead Field	Maps to
Address	Account: Billing Address Person Account: Mailing Address and Billing Address Contact: Mailing Address
Annual Revenue	Account: Annual Revenue Person Account: Annual Revenue

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Lead Field	Maps to
Campaign	Opportunity: Primary Campaign Source This field shows the campaign associated with a lead before conversion. The campaign provides 100% of the amount revenue credit to the specified campaign. For leads associated with multiple campaigns, Salesforce adds the most recently associated campaign to the opportunity, even if the sales rep can't access that campaign.
City	Account: Billing City Person Account: Mailing City and Billing City
Company	Account: Account Name Contact: Account Opportunity: Opportunity Name and Account Name
Company Name (Local)	Account: Account Name (Local)
Country	Account: Billing Country Person Account: Mailing Country and Billing Country
Country Code	Account: Billing Country Code Person Account: Mailing Country Code and Billing Country Code
Description	Contact: Description
Do Not Call	Contact: Do Not Call This field is not updated for leads converted to existing contacts. Person Account: Do Not Call
Email	Contact: Email Person Account: Email
Email Opt Out	Contact: Email Opt Out This field is not updated for leads converted to existing contacts. Person Account: Email Opt Out
Fax	Account: Fax Person Account: Fax Contact: Fax
Fax Opt Out	Contact: Fax Opt Out Person Account: Fax Opt Out
First Name	Contact: First Name Person Account: First Name

Lead Field	Maps to
First Name (Local)	Contact: First Name (Local) Person Account: First Name (Local)
Industry	Account: Industry Person Account: Industry
Informal Name	Person Account: Informal Name
Last Name	Contact: Last Name Person Account: Last Name
Last Name (Local)	Contact: Last Name (Local) Person Account: Last Name (Local)
Latitude	Account: Billing Latitude Person Account: Mailing Latitude and Billing Latitude
Lead Owner	Account: Owner Contact: Owner Opportunity: Owner
Lead Source	Contact: Lead Source Opportunity: Lead Source Person Account: Lead Source
Longitude	Account: Billing Longitude Person Account: Mailing Longitude and Billing Longitude
Middle Name	Person Account: Middle Name
Mobile	Contact: Mobile Person Account: Mobile
No. of Employees	Account: Employees Person Account: Employees
Partner Account	Opportunity: Partner Account This field is not updated for leads converted to existing opportunities.
Phone	Account: Phone Person Account: Phone Contact: Phone

Lead Field	Maps to
Postal Code	Account: Billing Postal Code Person Account: Mailing Postal Code and Billing Postal Code
Rating	Account: Rating Person Account: Rating
Salutation	Person Account: Salutation
State	Account: Billing State Person Account: Mailing State and Billing State
State Code	Account: Billing State Code Person Account: Mailing State Code and Billing State Code
Street	Account: Billing Street Person Account: Mailing Street
Suffix	Person Account: Suffix
Title	Contact: Title Person Account: Title
Website	Account: Website Person Account: Website


Opportunity Close Dates

During the lead conversion process, Salesforce automatically assigns close dates for the opportunities you create depending on the fiscal year settings in Salesforce.

If the fiscal year in Salesforce is	Salesforce assigns close dates for opportunities to
Standard	The last day of the current fiscal quarter.
Custom	The last day of the current fiscal period. If a fiscal year has not been defined for the current date, the close date is the end of the current calendar quarter.

Guidelines for Mapping Custom Lead Fields for Lead Conversion

Learn the best practices for mapping custom lead fields to custom fields in contacts, accounts, and opportunities. Mapping custom fields helps your sales reps retain that important information when they convert qualified leads to track new potential deals.

- The following Lead custom field types can only be mapped to custom fields of the same data type.
 - Checkbox
 - Currency
 - Date
 - Date/Time
 - Email
 - Geolocation
 - Encrypted (Classic)
 - Number
 - Percent
 - Phone
 - Multi-select Picklist
 - Long Text
 - Rich Text
 - URL
 - Each target field can have only 1 source field mapped to it.
 - You can map auto-number fields to field types text or text area.
 - You can map text and text area fields to custom field types of text, text area, long text, and picklist. If you map to a picklist field, the picklist must be unrestricted.
 - You can map custom picklist fields to custom field types of text, text area, and picklist (unrestricted), but not long text.
 - When mapping between picklist and text fields, your data truncates if the source field value is longer than the target field allows.
 - Custom lookup fields can be mapped to a lookup field pointing to the same object. For example, a lead custom lookup field pointing to the Account object can be mapped to a contact custom lookup field that also points to the Account object.
 - When mapping custom lead fields, the selected account, contact, or opportunity field must be of equal or greater length.
 - You can't delete lead, account, contact, or opportunity fields included in Lead Custom Field Mapping. To delete a field, first remove its mapping.
 - You can't change the field type of a field that's included in Lead Custom Field Mapping. To change a field's type, remove its mapping first.
 - You can't uninstall a package that references fields included in Lead Custom Field Mapping. Remove any mappings of referenced fields before uninstalling the package.
 - When mapping lead custom number, currency, or percent fields the target field must have the same length and number of decimal places.
-  **Note:** Do not map custom formula fields to other formula fields or any other type of field.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

Guidelines for Setting Up Web-to-Lead

Get Salesforce ready to gather information from your company's website and automatically generate up to 500 new leads a day.

If you want to	Make sure to
Track special lead information that standard fields for Salesforce leads don't accommodate	Create custom lead fields and specify how you want them to map to custom fields for accounts, contacts, and opportunities during lead conversion.
Automatically send prospects email after they've submitted information through your website	Create public email templates. If you plan to set up email response rules to use different email templates depending on the information submitted, create one default template to send when none of your response rules apply.
Set the default status for new and converted leads	Use the <code>Lead Status</code> picklist to do so.
Assign leads to sales reps and queues	<ul style="list-style-type: none"> • Create lead queues if you want to assign leads to queues instead of individual sales reps. • Choose a default owner of leads that fail to meet the criteria in your assignment rule using Lead Settings. • Determine how web-generated leads get assigned to users or queues by creating a lead assignment rule and activating it. If the rule is inactive, all web-generated leads get assigned to the default owner you specify in Lead Settings.

Leads FAQs

- [What is a Lead?](#)
- [What are the advantages of using leads?](#)
- [Can I convert existing accounts or contacts into leads?](#)
- [How many leads can we capture from our website?](#)
- [What if my company reaches the limit for web-generated leads?](#)
- [Can I capture leads from multiple web pages?](#)
- [Can I automatically email leads that come from my website?](#)
- [How can our webmaster test the Web-to-Lead page?](#)
- [Who owns new web-generated leads?](#)
- [What status is assigned to web-generated leads?](#)
- [How can I be sure that leads won't be lost?](#)
- [How can I tell which of my leads are new?](#)
- [What happens when I convert leads?](#)
- [How are lead fields mapped to other fields during conversion?](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up Web-to-Lead:

- [Customize Application](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

- What is a Lead?
- What are the advantages of using leads?
- Can I automatically email leads that come from my website?
- Can I capture leads from multiple web pages?
- Can I convert existing accounts or contacts into leads?
- How are lead fields mapped to other fields during conversion?
- How can I be sure that leads won't be lost?
- How can I tell which of my leads are new?
- How can our webmaster test the Web-to-Lead page?
- How many leads can we capture from our website?
- What happens when I convert leads?
- What if my company reaches the limit for web-generated leads?
- What status is assigned to web-generated leads?
- Who owns new web-generated leads?

What is a Lead?

Leads are people who are interested in your product and service. Converting leads to loyal customers will provide success within a business. By managing your leads in a systematic and structured way, you can increase both the numbers of leads you generate and how many leads you convert.

What are the advantages of using leads?

Using leads allows your company to maintain two separate lists - one for prospective customers and one for existing customers. You can store your prospects as leads, and then once a lead becomes qualified, you can convert it to an account, contact, and, optionally, an opportunity.

Leads are especially useful if your company has two separate teams - one that handles lead generation and mass marketing and one that handles sales. The lead generation team can concentrate their work on the Leads tab, and the opportunity team can use the Account, Contact, and Opportunity tabs.

Can I automatically email leads that come from my website?

Yes. You can create auto-response rules to email these prospects using templates that vary based on criteria that you set up.

Can I capture leads from multiple web pages?

Yes. Insert the generated HTML code into the web pages from which you want to capture leads. Whenever someone submits information on any of those web pages, a lead will be created.

Can I convert existing accounts or contacts into leads?

No. As an alternative, create an opportunity for the account or contact. If you prefer to use a lead, create a report containing the accounts or contacts you want to convert into leads, export them, and then import them as leads.

How are lead fields mapped to other fields during conversion?

When you convert a lead, data in standard lead fields is transferred into standard account, contact, and opportunity fields. For custom lead fields, the data is mapped to custom account, contact, and opportunity fields as specified by your admin.

Any standard lead picklist fields that are blank inherit the default picklist value for accounts, contacts, and opportunities. If you use record types, all records created during lead conversion adopt the default record type for the owner of the newly created account, contact, and opportunity.

How can I be sure that leads won't be lost?

The daily limit for Web-to-Lead requests is 500. If your organization exceeds its daily Web-to-Lead limit, the Default Lead Creator (specified in the Web-to-Lead setup page) receives an email containing the additional lead information.

If a new lead cannot be generated due to errors in your Web-to-Lead setup, Customer Support is notified so that we can assist you in correcting it.

Salesforce ensures that your leads won't be lost if they are submitted during a scheduled Salesforce downtime.

How can I tell which of my leads are new?

When a lead is assigned to you, either manually transferred, imported, or generated from the web, the lead is marked as "Unread," that is, it has a check mark in the Unread column on leads list views. To view your new leads, select the My Unread Leads list view on the Leads tab. When you view or edit an "Unread" lead, it is automatically marked as "Read."

How can our webmaster test the Web-to-Lead page?

Add the following line to your Web-to-Lead page code if you want to see a debugging page when you submit the form. Don't forget to remove this line before releasing the Web-to-Lead page on your website.

```
<input type="hidden" name="debug" value="1">
```

How many leads can we capture from our website?

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, you can capture up to 500 leads in a 24-hour period. If your organization exceeds its daily Web-to-Lead limit, the Default Lead Creator (specified in the Web-to-Lead setup page) receives an email containing the additional lead information. If your company regularly exceeds the Web-to-Lead limit, click **Help & Training** at the top of any page and select the My Cases tab to submit a request for a higher limit directly to Salesforce.

When your organization reaches the 24-hour limit, Salesforce stores additional requests in a pending request queue that contains both Web-to-Case and Web-to-Lead requests. The requests are submitted when the limit refreshes. The pending request queue has a limit of 50,000 combined requests. If your organization reaches the pending request limit, additional requests are rejected and not queued. Your administrator receives email notifications for the first five rejected submissions. Contact Salesforce Customer Support to change your organization's pending request limit.

What happens when I convert leads?

When you convert leads, Salesforce creates accounts, contacts, and opportunities using information from the leads you're converting. Salesforce moves any campaign members to the new contacts, and the leads become read-only records. If existing accounts and contacts share the names specified on the leads, you can choose to update the existing accounts and contacts. Salesforce adds information from the lead into empty fields; Salesforce does not overwrite existing account and contact data.

All open and closed activities from the leads are attached to the accounts, contacts, and opportunities. You can assign the owners of these new records, and schedule follow-up tasks. When you assign new owners, only the open activities are assigned to the new owner. If you have custom lead fields, that information can be inserted into custom account, contact, or opportunity fields. Your admin can also

set up your custom lead fields to populate custom account, contact, and opportunity fields automatically. You can't view converted leads, unless your admin has assigned you the "View and Edit Converted Leads" permission. However, converted leads do appear in lead reports. Salesforce updates the `Last Modified Date` and `Last Modified By` system fields on converted leads when picklist values included on converted leads are changed.

Once converted, a lead record is no longer searchable, unless your admin has assigned you the "View and Edit Converted Leads" permission. The new account, contact, or opportunity record created from the converted lead is searchable.

What if my company reaches the limit for web-generated leads?

The daily limit for Web-to-Lead requests is 500. If your company generates more leads than the maximum allowed, the Default Lead Creator (specified in the Web-to-Lead setup page) will receive an email containing the captured information. Contact Customer Support if your company would like to generate over 500 Web-to-Lead requests per day.

What status is assigned to web-generated leads?

All new web leads are marked with a status equal to the "default status" that your administrator selects when editing the `Lead Status` picklist values. In addition, web-generated leads are marked with the "Unread" flag; they have a check mark in the Unread column on the lead list views. When a user views or edits a new web lead, the lead is automatically set to "Read." This way you can easily locate all new leads using the My Unread Leads list view.

Who owns new web-generated leads?

Your administrator can create a lead assignment rule to determine how web leads will be automatically assigned to different users or queues. In addition, your administrator must customize the Lead Settings to specify a Default Lead Owner. If the assignment rule fails to locate an owner, web leads are assigned to the default lead owner. If you do not use assignment rules, all web leads are assigned to the default lead owner.

Turn Opportunities into Deals

Move opportunities through the sales process, and track exactly what you're selling and for how much.

[Products and Price Books](#)

Products are a base catalog of all the items and services you sell and their standard prices. Price Books let you create a custom collection of products with associated list prices for specific uses.

[Opportunities](#)

Track and manage your potential deals with Salesforce opportunities.

[Quotes](#)

Quotes in Salesforce represent the proposed prices of your company's products and services. You create a quote from an opportunity and its products. Each opportunity can have multiple associated quotes, and any one of them can be synced with the opportunity. When a quote and an opportunity are synced, any change to line items in the quote syncs with products on the opportunity, and vice versa. Get an overview of all your quotes on the Quotes tab. And if you're using Lightning Experience, track sales activity in Path and stages in Kanban.

[Contracts](#)

A contract is a written agreement between parties. Many companies use contracts to define the terms for doing business with other companies. Use Salesforce to establish and document the contracts that you have with your accounts and opportunities. Track the contract through your approval process. And use workflow alerts to remind yourself of contract renewals.

[Orders](#)

Use orders to track your customers' requests for products and services.

Products and Price Books

Products are a base catalog of all the items and services you sell and their standard prices. Price Books let you create a custom collection of products with associated list prices for specific uses.

[Set Up Products](#)

Customize products to make them work better for your sales reps.

[Manage Products](#)

Create and update the products your company sells and their standard prices.

[Product Schedules](#)

Use product schedules to determine the payment and delivery cycles for products that are paid or delivered over time.

[Manage Price Books](#)

Price books track the prices of products and services that your company offers to customers.

[Things to Know About Products and Price Books](#)

Review these considerations before you delete products or pricebooks. Learn more about product, price book, price book entry, and product schedule fields.

Set Up Products

Customize products to make them work better for your sales reps.

[Activate and Deactivate Product Prices with Their Products Simultaneously](#)

Set up Salesforce so that when you activate or deactivate a product, all related prices for that product are activated or deactivated at the same time.

[Organize Products with Product Families](#)

Use the `Product Family` picklist to categorize your products. For example, if your company sells both hardware and software, you can create two product families: Hardware and Software.

Activate and Deactivate Product Prices with Their Products Simultaneously

Set up Salesforce so that when you activate or deactivate a product, all related prices for that product are activated or deactivated at the same time.

1. From Setup, enter *Product Settings* in the *Quick Find* box, then select **Product Settings**.
2. Select *When changing active flag on a product record*.
3. Save your changes.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To auto-activate or auto-deactivate product prices:

- Customize Application

Organize Products with Product Families

Use the *Product Family* picklist to categorize your products. For example, if your company sells both hardware and software, you can create two product families: Hardware and Software.

If your organization has customizable forecasting, your users can have a different quota for hardware sales and software sales. Users can also view forecasts for opportunities with hardware products separate from opportunities that include software products.

To begin using product families:

- Customize the *Product Family* picklist to include the different categories of products you sell.
- For each product in your price books, edit the product and select the appropriate *Product Family* value.
- If your organization has customizable forecasting, set a different quota for each product family for your users.
- If your organization has customizable forecasting, consider changing your forecast settings to display a particular forecast family value by default when your users click the *Forecasts* tab.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To edit product families:

- Customize Application

Manage Products

Create and update the products your company sells and their standard prices.

[Products Concepts](#)

Before you use products in Salesforce, make sure that you understand the basics.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

[Guidelines for Creating Products](#)

If you're an admin or sales operations manager, you'll create products in Salesforce to track the products and services that your company sells. After you create a product, your sales reps can add it to their quotes, opportunities, and orders. Before you get started, review a few key guidelines.

[Considerations for Cloning Products](#)

If you're an admin or a sales operations manager, you can clone a product to quickly create another product with the same information and price book entries. Consider key points before you clone a product.

[Set and Edit Product Prices](#)

Set and edit prices for each of your company's products and services.

[Considerations for Setting Prices](#)

If you're an admin or a sales operations manager, consider key points before you set prices for your products in Salesforce.

Products Concepts

Before you use products in Salesforce, make sure that you understand the basics.

Products are the items and services that you sell to customers. Each product can exist in multiple price books with different prices.

When you view the detail page of an opportunity, quote, order, or service contract, the Products related list or the Quote Line Items related list shows the associated products for that record. Use these related lists to choose a price book for the record, add or edit products, and, for opportunities, establish or edit product schedules. For example, on a quote detail page, click **Add Line Item** on the Quote Line Items related list to select a product to list on the quote.

If products are shared with external contacts via Salesforce to Salesforce, choose one of the list views under Products from Connections to view products that your business partners have shared with you.

EDITIONS

Products, price books, and quotes available in: both Salesforce Classic and Lightning Experience

Products, price books, and orders available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Quotes available in: **Performance** and **Developer** Editions and in **Professional, Enterprise,** and **Unlimited** Editions with the Sales Cloud

Guidelines for Creating Products

If you're an admin or sales operations manager, you'll create products in Salesforce to track the products and services that your company sells. After you create a product, your sales reps can add it to their quotes, opportunities, and orders. Before you get started, review a few key guidelines.

- To view and create products, you need the "Read" and "Create" permissions on products.
- To get started creating products, click **New** on the Products home page.
- You can create a product by cloning an existing product. See [Considerations for Cloning Products](#).
- To ensure fast system performance with price books, keep the number of products below 2,000,000.
- Products need a [standard active price](#) before you can add them to a price book.
- To define a payment and delivery cycle via a [product schedule](#), click **Edit** above the product detail.
- For descriptions of product fields, see [Product, Price Book, Price Book Entry, and Product Schedule Fields](#).

Considerations for Cloning Products

If you're an admin or a sales operations manager, you can clone a product to quickly create another product with the same information and price book entries. Consider key points before you clone a product.

When you clone a product:

- Price book entries in price books that you don't have sharing access to aren't created.
- If you have read-only access to a field, the value of that field isn't carried over to the cloned record.

EDITIONS

Products, price books, and quotes available in: both Salesforce Classic and Lightning Experience

Products, price books, and orders available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Quotes available in: **Performance and Developer** Editions and in **Professional, Enterprise, and Unlimited** Editions with the Sales Cloud

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

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

Set and Edit Product Prices

Set and edit prices for each of your company's products and services.

[Set and Edit Product Prices in Salesforce Classic](#)

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

[Set Product Prices in Lightning Experience](#)

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

EDITIONS

Products, price books, and quotes available in: both Salesforce Classic and Lightning Experience

Products, price books, and orders available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Quotes available in: **Performance** and **Developer** Editions and in **Professional, Enterprise, and Unlimited** Editions with the Sales Cloud

Set and Edit Product Prices in Salesforce Classic

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

Set Standard Prices

1. Select a product.
2. On the product detail page, click **Add** from the Standard Price related list.
If you've already added a standard price, click **Edit** to change it or **Edit All** to edit all standard prices in other currencies.
3. Enter the standard price.
4. Select **Active** to make this price available to products on opportunities, quotes, or other custom price books.
5. Save your changes.
The standard price is automatically associated with the product in your standard price book.

Set List Prices

1. Select a product.
2. On the product detail page, click **Edit** from the Price Books related list next to the custom price book that will contain the list price.
If you haven't already added the product to a custom price book, click **Add to Price Book** from the Price Books related list.
3. Enter the list price. Alternatively, if both prices are the same, select **Use Standard Price**.
4. Select **Active** to make this price available to products on opportunities or quotes.
5. Save your changes.

Edit a Price

Click **Edit** next to a price book entry record in any of these locations.

- The price book detail page, in the Products related list
- The product detail page, in the Standard Price related list
- The product detail page, in the Price Books related list
- The price book list view

For information about fields, see [Product](#), [Price Book](#), [Price Book Entry](#), and [Product Schedule Fields](#).

EDITIONS

Products, price books, and quotes available in: both Salesforce Classic and Lightning Experience

Orders available in: Salesforce Classic

Products, price books, and orders available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Quotes available in: **Performance and Developer** Editions and in **Professional, Enterprise, and Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To set prices on products:

- Edit on products
- AND
- Read on Price Books

Set Product Prices in Lightning Experience

Track different types of prices for each of your products to fit the way you sell to different market segments and customers.

Set Standard Prices in the Standard Price Book

1. Select a product.
2. From the product page, click **Add Standard Price** from the Price Books related list. If you've already added a standard price, click **Edit** from the Show More menu to change it.
3. Enter the new standard price in the `List Price` field.
4. To make this price available to products on opportunities, quotes, or other custom price books, select `Active`.
5. Save your changes.

The standard price is automatically associated with the product in your standard price book.

Set List Prices in Custom Price Books

1. Select a product.
2. On the product page, click **Add to Price Book** from the Price Books related list.
3. Choose the price book and currency for the new list price, and then click **Next**.
4. Enter the list price. Alternatively, if you want the price in the chosen price book to match the standard price, select `Use Standard Price`.
5. To make this price available to be used when adding the product to opportunities or quotes, select `Active`.
6. Save your changes.

Edit a Price Book Entry

Click **Edit** next to a price book record in any of these locations.

- The price book detail page, in the Products related list
- The product detail page, in the Price Books related list

For information about fields, see [Product, Price Book, Price Book Entry, and Product Schedule Fields](#).

EDITIONS

Products, price books, and quotes available in: both Salesforce Classic and Lightning Experience

Orders available in: Salesforce Classic

Products, price books, and orders available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Quotes available in: **Performance and Developer** Editions and in **Professional, Enterprise, and Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To set prices on products:

- Edit on products
- AND
- Read on Price Books

Considerations for Setting Prices

If you're an admin or a sales operations manager, consider key points before you set prices for your products in Salesforce.

- The following price types are available.
 - A *standard price* is the default price that you associate with a product. It's automatically included in your standard price book.
 - A *list price* is the custom price that you associate with a product in a custom price book. For example, you can maintain one set of prices for domestic orders and another for international orders.
 - *Sales prices* are the actual prices that sales reps specify for the products that they add to opportunities and quotes. Sales prices can be the same as the list prices from the price book that's used for the opportunity or quote, or they can include discounts or other modifications.
- Before you can add a new product to an opportunity, quote, or custom price book, add a standard price to the product, and mark it as active. This pricing is the default pricing of the product.
- Before you can assign list prices for products, create custom price books. List prices are available to use when you add products to an opportunity or quote from a custom price book.
- To represent the price, for example, \$100.00, enter *100* or *100.00*, with or without the \$ symbol.
- You can expand the format of your price fields to up to eight decimal places. To change your decimal place settings, contact Salesforce.

Considerations When Using the Salesforce Classic User Interface

- You can add standard or list prices only through the multiline add pages (the Add Standard Price page and the Add List Price page). These pages don't support custom fields. To add standard or list prices and populate custom fields, add the price book entry via the multiline add pages, navigate to the Price Book Entry Edit page for the added record, and then update the custom fields.



Note: This consideration doesn't affect price book entries that were created or edited by using Data Loader or the API.

- If the price book entry contains required custom fields, you can't create price book entries in the user interface. You can create these price book entries only by using Data Loader or the API.
- You can edit prices in either of the following locations.
 - The multiline edit pages (the Edit Standard Price page and the Edit List Price page)
 - The Price Book Entry Edit page

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Products and price books available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Quotes available in: **Performance** and **Developer** Editions and **Professional, Enterprise, and Unlimited** Editions with the Sales Cloud

Product Schedules

Use product schedules to determine the payment and delivery cycles for products that are paid or delivered over time.

- A *quantity schedule* determines when a product is delivered.
- A *revenue schedule* determines when a product is paid for.
- A *default schedule* is associated with a specific product in a specific price book. Every time the product is added to an opportunity, the default schedule is used. You can override the default schedules on any opportunity.

You determine which types of schedules your Salesforce org can use and which types of schedules can be established for each individual product.

- A quantity schedule is suitable if your customers pay once but receive the product in increments, for example, as with an annual magazine subscription for a monthly magazine. A quantity schedule defines the dates, number of units, and number of installments for payments, shipping, or other use as determined by your company.
- A revenue schedule is suitable if your customers make regular payments but receive the product once, for example, if you sell customized products that are charged in installments but delivered once. A revenue schedule defines the dates, revenue amounts, and number of installments for payments, recognizing revenue, or other use.
- A revenue and quantity schedule is suitable if your customers receive their orders on a delivery schedule and pay for the products using a payment schedule, for example, a monthly product subscription that's paid for monthly.
- A default schedule is suitable if all your customers make product payments on the same timetable or you deliver products on a regular schedule. If you typically customize schedules, there's no advantage to creating default schedules.

Enable Product Schedules

Create default revenue and quantity schedules for products that are delivered or paid for over a period of time. In addition, administrators can enable schedule settings that allow users to create schedules for individual products on opportunities.

Considerations for Using Product Schedules

Consider key points and review examples before you add product schedules or establish schedules on opportunity products.

Add and Edit Product Schedules

Add product schedules to define the payment and delivery cycles of your products.

Establish Schedules for Products on Opportunities

After you add product schedules, use them to set up payments for product sales and realized revenue on opportunities.

Enable Product Schedules

Create default revenue and quantity schedules for products that are delivered or paid for over a period of time. In addition, administrators can enable schedule settings that allow users to create schedules for individual products on opportunities.

1. From Setup, enter *Product Schedules* in the **Quick Find** box, then select **Product Schedules Settings**.
2. Select the appropriate checkboxes to enable quantity and revenue schedules for your organization. Note that disabling a schedule type automatically deletes all existing schedule information from products.

EDITIONS

Schedules can be established in: Salesforce Classic

Scheduled products can be added to opportunities and viewed in: Salesforce Classic and Lightning Experience

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

EDITIONS


Available in: Salesforce Classic

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

For a definition of each schedule type, see [Products, Price Books, and Schedules Overview](#) on page 96.

- For each schedule type you enable, select whether to automatically enable that schedule type for every product in your price books. This option automatically selects the `Quantity Scheduling Enabled` or `Revenue Scheduling Enabled` checkboxes on every product in your price books.
- Click **Save**.

For greater control of schedules on a product-by-product basis, administrators can also determine which schedule types users can establish for each product.

 **Note:** Enabling or disabling schedules does not affect archived products.

If schedules are referenced in Apex, only one of the schedule types (quantity or revenue) can be disabled. For example, if Apex references the schedule object (represented as `OpportunityLineItemSchedule` in the code), one of the schedule types can be disabled, but not both.

Considerations for Using Product Schedules

Consider key points and review examples before you add product schedules or establish schedules on opportunity products.

Considerations for Using Default Product Schedules

- If you add or change a product schedule, opportunities with that product aren't updated. If a product has a default quantity schedule and a default revenue schedule, the quantity schedule is calculated first to determine the total product revenue. Then the revenue schedule is applied to that amount.
- If you have a quote line item with a discount, and the corresponding product record has a default schedule, you can't edit the `Discount` field.
- If a product has default schedules established on the product record, the schedules are automatically created when you add the product to the opportunity. The dates of the installments begin with the date that you specified when adding the product. If you didn't specify a product date, the installment dates begin with the opportunity `Close Date`.

EDITIONS

Schedules can be established in: **Salesforce Classic**

Scheduled products can be added to opportunities and viewed in: **Salesforce Classic and Lightning Experience**

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

Examples of Using Default Product Schedules

- Default Revenue Schedule Only:** Your ASP company sells yearly contracts of product licenses at \$1,200 per license. When a customer buys licenses, the licenses are all "delivered" at one time, but you recognize the revenue monthly. In this case, set a revenue schedule of `Schedule Type=Divide`, `Installment Period=Monthly`, and `Number of Installments=12`.

With this default revenue schedule, a salesperson sells 200 licenses at a unit price of \$1,200 per license per year on an opportunity on March 15. The 200 licenses are all "delivered" on March 15. The total revenue for this product is the quantity of 200 multiplied by the unit price of \$1,200 per year, for a total yearly revenue of \$240,000. The revenue schedule divides the total revenue into monthly installments of \$20,000 on the 15th of every month for the next year.

- Default Quantity Schedule Only:** Your medical supplies company sells a box of tongue depressors for \$10 per box. You normally have yearly contracts with hospitals to deliver boxes monthly. In this case, set a quantity schedule of `Schedule Type=Repeat`, `Installment Period=Monthly`, and `Number of Installments=12`.

With this default quantity schedule, a salesperson sells 1,000 boxes on an opportunity on January 1. The quantity schedule creates 12 monthly installments of 1,000 boxes each, for a total quantity of 12,000 boxes. The total revenue from this opportunity is calculated using the unit price and the total quantity, so \$120,000 is booked on January 1.

- **Default Quantity and Revenue Schedules:** Your manufacturing company sells widgets for \$10 each. You normally have yearly contracts to deliver widgets weekly, but your customers pay quarterly. In this case, set a quantity schedule of Schedule Type=Repeat, Installment Period=Weekly, and Number of Installments=52 . Set a revenue schedule of Schedule Type=Divide, Installment Period=Quarterly, and Number of Installments=4.

With these default schedules, a salesperson sells 2,000 widgets on an opportunity on January 1. The quantity schedule is applied first, and it schedules 2,000 widgets to be delivered every week for a year, for a total quantity of 104,000. The total revenue is calculated using the unit price and the total quantity. The total revenue of \$1,040,000 is then divided into quarterly installments of \$260,000.

Add and Edit Product Schedules

Add product schedules to define the payment and delivery cycles of your products.

1. Review [considerations and examples](#).
2. Enable the appropriate [schedule types](#).
3. Select a product from the Products home page.
4. Click **Edit**.
5. Select the type of schedule to create: quantity, revenue, or both. Your choices are limited by your Salesforce org's schedule settings and the schedule types that are enabled for the product.
6. Set the schedule details. See [Schedule Fields](#) for descriptions.
7. Save your changes.
8. To establish a schedule on an opportunity product, see [Establish Schedules for Products on Opportunities](#).
9. To edit a product schedule, click **Edit** on the product detail page.

Establish Schedules for Products on Opportunities

After you add product schedules, use them to set up payments for product sales and realized revenue on opportunities.

1. Review [considerations and examples](#).
2. Make sure that [product schedules have been added](#).
3. Click a product name in the Products related list of an opportunity.
4. Click **Establish** to create a schedule, or click **Re-Establish** to delete the old schedule and create a new one.
5. Select the type of schedule to create: quantity, revenue, or both. Your choices are limited by your Salesforce org's schedule settings and the schedule types that your admin enabled for the product.
6. Set the schedule details. See [Schedule Fields](#) for a description of scheduling fields.
7. Save your changes.
Salesforce displays the schedule installments.
8. To edit the installments, click **Edit**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add or edit product schedules:

- Edit on products

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add or edit product schedules:

- Edit on opportunities

Manage Price Books

Price books track the prices of products and services that your company offers to customers.

A *price book* is a list of products and their prices.

- The *standard price book* is the master list of all your products and their default *standard prices*. Salesforce creates the standard price book when you start creating product records. It includes all your products and their standard prices regardless of any custom price books that include those products.
- A *custom price book* is a separate list of products with custom prices, called *list prices*. Custom price books are ideal for offering products at different prices to different market segments, regions, or other subsets of your customers. Create a separate price book for each set of customers that you want to address. For example, if you have one set of prices for domestic customers and another for international customers, create a domestic price book and an international one.

A *price book entry* is a product with its price as listed in a price book. Each price book entry specifies a currency for the price.

- *Standard price book entries* are the default (standard) prices for the products and services in the standard price book. When you create a product record, Salesforce creates a standard price book entry. You can mark the standard price book entry as active or inactive, depending, for example, on whether you intend to start selling the product right away.
- *Custom price book entries* are the custom (list) prices for the products and services in your custom price books. Custom price book entries can be created only for products with active standard price book entries.
- In Lightning Experience, Product detail pages display the Standard Price related list and the Price Books related list as a single Price Books related list.
- If you customize the Price Book Entry detail page layout, no field dependencies exist for price book entry fields in the user interface. If the `Use Standard Price` checkbox is removed from the page layout, and this checkbox is selected for a price book entry, you can't edit the list price. The `List Price` field is disabled and can't be enabled on this page.

Create Custom Price Books

Create custom price books for each market segment that your sales reps sell to. Then add products to each price book with the prices that you offer each market segment. For example, if you sell to domestic and international customers at different prices, you can create two custom price books: a domestic one and an international one.

Considerations for Creating and Maintaining Price Books

Before you create a price book, consider a few key points.

Guidelines for Sharing Price Books

Extend access to price books to more of your sales team members through sharing in Salesforce Classic.

Considerations for Removing Price Books

To remove price books from related lists, you can archive, deactivate, or delete the price books. Each removal option has a different result. Before you remove a price book from your related lists, determine which option best fits your business needs.

Considerations for Removing a Product from a Price Book

Before you remove a product from a price book, consider a few key points.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Create Custom Price Books

Create custom price books for each market segment that your sales reps sell to. Then add products to each price book with the prices that you offer each market segment. For example, if you sell to domestic and international customers at different prices, you can create two custom price books: a domestic one and an international one.

1. Review [considerations](#).
2. On the Price Books page, click **New**.
3. Enter a name for your price book.
4. If your Salesforce org uses descriptions, enter one for your price book.
5. Select **Active** to allow sales reps to begin adding the price book or its entries to opportunities or quotes.
6. If you created the custom price book from scratch, leave it empty, populate it with price book entries from another price book, or add new entries.

For information about price book fields, see [Product](#), [Price Book](#), [Price Book Entry](#), and [Product Schedule Fields](#).

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Quotes available in: Salesforce Classic

Products and price books available in: **Performance, Professional, Enterprise, Performance, Unlimited,** and **Developer Editions**

Quotes available in: **Performance and Developer Editions** and in **Professional, Enterprise, and Unlimited Editions** with the Sales Cloud

USER PERMISSIONS

To create or clone price books:

- Create on price books

To view price books:

- Read on products

AND

Read in price books

Considerations for Creating and Maintaining Price Books

Before you create a price book, consider a few key points.

- To create a custom price book by cloning an existing price book, click **Clone** on the price book detail page.
- You can delete products from custom price books without affecting the original product listing or its entries in other price books. When you delete a product from the standard price book, the product is still available and active, but its standard price is deleted and removed from all custom price books. If you delete the product from the standard price book, and it's still associated with any custom price books, click **OK** to remove it from all custom price books.
- You can add products, quote line items, or order products from a single price book only.
- To include a product on an opportunity, quote, or order, choose a price book that contains the product. The last price book that you used on an opportunity or quote is selected by default. To select a different price book, click **Choose Price Book** in the Products related list on an opportunity or the Quote Line Items related list on a quote. Choose Price Book appears when you have access to more than one price book. If you have access to more than one price book and the option isn't visible, ask your administrator to add it to your page layout.
- If you change the price book for an opportunity that has products, all products are deleted from the Products related list, but the value in the opportunity's Amount field remains.

Guidelines for Sharing Price Books

Extend access to price books to more of your sales team members through sharing in Salesforce Classic.

If you're an admin or a user with the "Edit" permission on price books, you can extend sharing of a price book to more users. However, you can't change the sharing model to make it more restrictive than the default.

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

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

Does your sales team want to see prices on the product detail page? If your organization-wide default for price books is "No Access," you can give your entire organization "View Only" access to your standard price book.

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Quotes and orders available in: Salesforce Classic

Products, price books, and orders available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Quotes available in: **Performance and Developer** Editions and in **Professional, Enterprise, and Unlimited** Editions with the Sales Cloud

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To share price books:

- Edit on price books

Considerations for Removing Price Books

To remove price books from related lists, you can archive, deactivate, or delete the price books. Each removal option has a different result. Before you remove a price book from your related lists, determine which option best fits your business needs.

- Deleting, deactivating, or archiving a custom price book doesn't affect other price books or your product lists. However, these actions can affect your opportunities and quotes. Changing associations with opportunities or quotes is sometimes required before you can remove an associated price book.
- You can deactivate the standard price book, but you can't delete or archive it.

Considerations for Deleting Price Books

- You can't delete a price book while it's in use on opportunities or quotes. If you try to, the system creates a list of the opportunities or quotes that the price book is used on.
- When you delete a price book, you delete all entries in the price book. The deleted price book and its entries are moved to the Recycle Bin. You can restore them for up to 15 days.

Considerations for Deactivating Price Books

- You can activate, deactivate, or reactivate price books at any time by changing the price book's properties.
- You can deactivate a price book even if it's used on an opportunity or quote.
- You can continue to manage entries in your price book while it's deactivated.

Considerations for Archiving Price Books

- You can archive a price book even if it's in use on an opportunity or quote.
- An archived price book is visible, but not accessible, in all associated records.
- Entries in archived price books don't appear in search results.
- You can't recover or delete an archived price book.

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Products and price books available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer Editions**

Quotes available in: **Performance and Developer Editions** and **Professional, Enterprise, and Unlimited Editions** with the Sales Cloud

Considerations for Removing a Product from a Price Book

Before you remove a product from a price book, consider a few key points.

- If you remove a product from a price book, all related price book entries are removed.
- If you restore the product from the Recycle Bin, any related price book entries are restored with it.
- If opportunities, quotes, service contracts, or contract line items are associated with a product, you can't remove the product.
- You can't remove a product that's used on an opportunity or quote. If you try to remove it, Salesforce displays a list of the opportunities and quotes. That way, you can remove the product from those opportunities and quotes and try again. If you don't want to remove the product from all opportunities and quotes, you can deactivate (recommended) or archive the product. See [Considerations for Removing Products and Price Books](#).

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

Quotes available in: Salesforce Classic

Products and price books available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Quotes available in: **Performance** and **Developer** Editions and in **Professional, Enterprise,** and **Unlimited** Editions with the Sales Cloud

Things to Know About Products and Price Books

Review these considerations before you delete products or pricebooks. Learn more about product, price book, price book entry, and product schedule fields.

[Product, Price Book, Price Book Entry, and Product Schedule Fields](#)

Products, price books, and product schedules have the following fields, listed in alphabetical order. Availability of fields depends on how Salesforce is set up.

[Considerations for Removing Products and Price Books](#)

Review a few key points before you remove a product or a price book.

Product, Price Book, Price Book Entry, and Product Schedule Fields

Products, price books, and product schedules have the following fields, listed in alphabetical order. Availability of fields depends on how Salesforce is set up.

Product Fields

Field	Description
Active	Whether the product is ready for use in a price book, opportunity, or quote, and whether you can find the product in searches and see the product in views.
Created By	The name of the user who created the product record, including the date and time of creation.
Custom Links	A list of custom links for products from Salesforce.
Last Modified By	The name of the user who last saved the record, including the date and time of the most recent save to the record.
Product Code	The internal code or product number that you use to identify the product.
Product Currency	In multicurrency organizations, the currency that you use for the product. If the product currency differs from the user currency, currency-related fields for opportunities, quotes, and quote line items appear in both currencies. The product's currency is converted to the user's currency, and the converted amount appears in parentheses.
Product Description	The text that distinguishes this product from other products.
Product Family	The category that you specify for the product.
Product Name	The product's name.
Product SKU	The product's SKU, which can be used with or in place of the <code>Product Code</code> field. For example, you can use the <code>Product Code</code> field to track the manufacturer's identifying code, and assign the product a SKU when you resell it.
Quantity Scheduling Enabled	Whether the product can have a quantity schedule.
Revenue Scheduling Enabled	Whether the product can have a revenue schedule.

EDITIONS

Products, price books, and quotes available in: both Salesforce Classic and Lightning Experience

Orders available in: Salesforce Classic

Products, price books, and orders available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Quotes available in: **Performance** and **Developer** Editions and in **Professional, Enterprise,** and **Unlimited** Editions with the Sales Cloud

Price Book Fields

Field	Description
Active	Whether you can add the price book to an opportunity or quote.
Created By	The name of the user who created the price book, including the date and time of creation.
Description	The text that distinguishes this price book from others.
Is Standard Price Book	Whether the price book is the standard price book. A read-only checkbox.
Last Modified By	The name of the user who last saved the record, including the date and time of the most recent save to the record.
Price Book Name	The price book's title.

Price Book Entry Fields

Field	Description
Active	Whether the price book entry (product and list price) is active and can be added to an opportunity or quote.
Created By	The name of the user who created the price book entry, including the date and time of creation.
Currency	This field is available only for Salesforce orgs with multiple currencies enabled and represents the currency to use for the price book entry (product and list price).
Last Modified By	The name of the user who last saved the price book entry record.
List Price	The price of the product within the price book, including currency.
Price Book	The price book that contains the price for this entry.
Product	The product's name.
Product Code	The internal code or product number that's used to identify the product.
Standard Price	The standard price for the product. This field is derived and doesn't exist on the underlying PricebookEntry standard object.
Use Standard Price	Whether the price book entry inherits its price from the standard price book.

Schedule Fields

Field	Description
Schedule Type	Whether the product revenue or quantity is divided into multiple installments or repeated for each installment.
Installment Period	The interval for installments; for example, Weekly or Monthly.
Number of Installments	The number of installments in the schedule.

Considerations for Removing Products and Price Books

Review a few key points before you remove a product or a price book.

- When you remove a product or price book, all related price book entries are removed. However, if several price books contain the same product, removing the product from one price book doesn't affect the other price books. Similarly, if you remove a price book, the products that it contained aren't removed from any other price book.
- To remove a product completely, remove it from the standard price book.
- If opportunities, quotes, service contracts, or contract line items are associated with a product, you can't remove the product.
- You can't remove a product or price book that's associated with an approval process or has a pending workflow action.
- If your product or price book is used on an opportunity, quote, or order, you have three options.
 - Deactivate it by editing it and then deselecting the `Active` field. We recommend deactivating a product or price book that's on an opportunity or quote because it will no longer be available to users. You can reactivate it later. Deactivation doesn't affect the history of an opportunity line item.
 - Remove the related product or price book from all opportunities and quotes. When you try to remove a product or price book that's used on an opportunity or quote, Salesforce displays a list of the opportunities or quotes that use it.
 - If you remove a price book, remove it from each opportunity and quote that's listed.
 - If you remove a product, remove it from each opportunity and quote that uses it.
 Then remove the price book or product.
 - Archive the product or price book and each related price book entry. Use this option with caution. Archived products and price books can't be recovered because they're not stored in the Recycle Bin. Archived products and price books still appear on any opportunities or quotes that contained them before they were archived.

If you archive a price book, it's still visible in the associated records but not accessible or retrievable.

EDITIONS

Products, price books, and quotes available in both Salesforce Classic and Lightning Experience

Products, price books, and orders available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Quotes available in: **Performance** and **Developer** Editions and in **Professional, Enterprise,** and **Unlimited** Editions with the Sales Cloud


Opportunities

Track and manage your potential deals with Salesforce opportunities.

Opportunities are deals in progress. Opportunity records track details about deals, including which accounts they're for, who the players are, and the amount of potential sales. If your organization uses leads, an opportunity is created when a lead is converted. Opportunities can also be created directly for accounts you're working. As your deals progress toward the Proposal stage:

- Add products and attach files, such as contracts or data sheets.
- Log the calls you make.
- Use Notes to jot down things during customer meetings.
- Create tasks for key activities and calendar events for client meetings.
- Send email to the opportunity contact or other key decision-makers.

During negotiation, share sales strategies with colleagues or to ask your manager for targeted guidance using Chatter. As you drive your deal from one stage to the next, update the opportunity record with the current stage. You'll be closing deals in no time.

 **Tip:** To learn more about using opportunities and leads, complete the [Leads & Opportunities](#) Trailhead module.

[Set Up Opportunities](#)

Customize options for opportunities to help your sales reps close deals faster.

[Manage Your Opportunities](#)

Create, share, clone, and move your opportunities through your sales process.

[Manage Opportunity Products](#)

Manage the products associated with your opportunities.

[Track Your Competitors](#)

Track competitors in a pending sale by listing the competitors' names in the opportunity. You can enter the names of new competitors, or choose from a list of competitors defined by your administrator. To access this information, go to the Competitors related list of the opportunity.

[Things to Know About Opportunities](#)

Review considerations, guidelines, and tips for opportunities.

Set Up Opportunities

Customize options for opportunities to help your sales reps close deals faster.

[Enable and Configure Similar Opportunities](#)

Allow users to find Closed/Won opportunities that match the attributes of an opportunity they're currently working on, so they can quickly access information that might help them close their open deals.

[Enable Opportunity Update Reminders](#)

Updated and accurate opportunities drive precise forecasts. Enabling update reminders lets managers send their direct reports automated emails with a report on the team's open opportunities.

EDITIONS

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

Available in: **All Editions** for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

[Activate Big Deal Alerts](#)

Your organization can use alerts that automatically send an email notification for opportunities with large amounts. You can activate one opportunity alert for your organization. The alert message resembles the opportunity detail page including the page layout and language from a selected user.

[Customize Big Deal Alerts](#)

Your organization can use alerts that automatically send an email notification for opportunities with large amounts. Customize this alert to send an email when an opportunity reaches a threshold.

Enable and Configure Similar Opportunities

Allow users to find Closed/Won opportunities that match the attributes of an opportunity they're currently working on, so they can quickly access information that might help them close their open deals.

Note:

- Searches are constructed as *OR* statements. Therefore, Closed/Won opportunities need to match only one criteria to be considered similar. For best search results, include multiple search terms.
- When deciding which opportunity fields to display on the Similar Opportunities related list, be aware that users will see all fields that are displayed, regardless of sharing rules and user permissions.

1. From Setup, enter *Similar Opportunities* in the **Quick Find** box, then select **Similar Opportunities**.
2. Click **Edit**.
3. Select **Enable Similar Opportunities**.
4. Select the fields or related lists that you want Similar Opportunities searches to match against, and then click **Add**.
5. Select the fields to display in the Similar Opportunities related list.
6. Click **Save**.
7. Make sure the Similar Opportunities related list is added to the opportunity page layout.

EDITIONS

Available in: **Salesforce Classic**

Available in: **All Editions** for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

USER PERMISSIONS


To enable and configure similar opportunities:

- **Customize Application**

Enable Opportunity Update Reminders

Updated and accurate opportunities drive precise forecasts. Enabling update reminders lets managers send their direct reports automated emails with a report on the team's open opportunities.

1. From Setup, enter *Update Reminders* in the **Quick Find** box, then select **Update Reminders**.
2. Click **Edit**.
3. Select **Enable Update Reminders for My Organization**.
4. Optionally, select **Automatically Activate Reminders for Users with Direct Reports** to schedule opportunity update reminders for all users who have direct reports.
5. Click **Save**.
6. If you didn't automatically activate all users with direct reports, then select which users you want to be able to schedule opportunity update reminders. Any user that has direct reports can be added.
7. Click **Activate**.
8. Let those users know they can [start scheduling update reminders for their direct reports](#).


 **Note:** If an account owner is allowed to send opportunity update reminders, then all partner and customer portal users that are assigned as Executives to the account will receive the reminders, even if they don't have access to the opportunity. To avoid reminders being sent to these users, remove them from the Executive role.

Activate Big Deal Alerts


Your organization can use alerts that automatically send an email notification for opportunities with large amounts. You can activate one opportunity alert for your organization. The alert message resembles the opportunity detail page including the page layout and language from a selected user.

Before you begin, you may want to decide which user has the page layout and language settings that you would like included in all alerts. This user must also have the "View All Data" permission.

1. From Setup, enter *Big Deal Alert* in the **Quick Find** box, then select **Big Deal Alert**.
2. Enter a name for the alert.
3. Enter a **Trigger Probability** and **Trigger Amount** in the corporate currency. An opportunity alert is triggered for opportunities with this probability and amount or greater. The alert triggers only for those opportunities that meet both the trigger probability and trigger amount threshold settings.

 **Note:** An opportunity can trigger a big deal alert even if it is in a currency that is different from the corporate currency. The **Amount** on an opportunity is converted to corporate currency and compared to the **Trigger Amount**. If you are using advanced currency management, dated exchange rates will be used.

4. Check the **Active** box if you would like to activate the new alert immediately after you save.
5. Enter the **From Email Name**.
6. Enter the **From Email Address**.

 **Note:** The From address must be either one of your verified organization-wide email addresses or the email address listed in your Salesforce profile.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable opportunity update reminders:

- **Customize Application**
OR **Manage Users**

To activate or deactivate opportunity update reminders:

- **Manage Users**


7. Select a user that provides the appropriate opportunity page layout, language, and currency settings for the content of the emails. This user must have the “View All Data” permission.

For organizations that use multiple currencies, all alerts include the amount in the currency of the opportunity. If the opportunity currency is different than the currency of the user selected in this step, both currencies are included in the email.

Enter a list of email recipients separated by commas. You can also include `CC:` and `BCC:` recipients but all must be valid email addresses.

The `BCC:` field is not available if your organization has enabled compliance BCC emails.

8. Check the `Notify Opportunity Owner` box if you would like to include the owner of the opportunity in the alert emails.
9. Click **Save**.

 **Note:** An opportunity alert sends a notification the first time an opportunity reaches the threshold. So, an opportunity that reaches the threshold with 90% probability will not trigger additional alerts if the probability subsequently goes higher. However, an opportunity that already triggered an alert and then fell below the threshold can trigger a second alert if it crosses that threshold again.

When working remotely in Connect Offline, you can make changes to opportunities that trigger alerts. These alert messages will be sent when you update your data.

Customize Big Deal Alerts

Your organization can use alerts that automatically send an email notification for opportunities with large amounts. Customize this alert to send an email when an opportunity reaches a threshold.

Your threshold consists of an opportunity amount and probability. For example, you can send an email to your team when an opportunity of \$500,000 has reached a probability of 90%.

EDITIONS

Available in: **Salesforce Classic**

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

USER PERMISSIONS

To activate big deal alerts:

- **Customize Application**

Manage Your Opportunities

Create, share, clone, and move your opportunities through your sales process.

[Considerations for Creating Opportunities](#)

Review these key points to better understand what happens when you create opportunities.

[Considerations for Sharing Opportunities](#)

By sharing your opportunities with other user you give visibility into your pipeline so others can provide you with important information to help you close your deals. Before you share your opportunities, make sure you're aware of these considerations.

[Considerations for Cloning Opportunities](#)

Cloning an opportunity quickly creates an opportunity with the same information as the existing on. Before you clone Salesforce opportunities, make sure you're familiar with these considerations.

[Move an Opportunity to the Next Stage](#)

Update your deal as it moves closer to closing. Accurate stage information is important for forecasting, reporting, and ultimately meeting your quota.

[Review an Opportunity's History](#)

Field History lets you track the changes made to an opportunity, including changes to the stage, so you can quickly see who changed the opportunity and when.

[Considerations for Deleting Opportunities](#)

Before you delete Salesforce opportunities, make sure you're familiar with these considerations.

[Schedule Reminders to Update Opportunities](#)

To ensure your team is keeping their opportunities up to date, create an automated email that contains a report of your team's open opportunities and send it to your direct reports.

[Guidelines for Finding Similar Opportunities](#)

Close your deals faster by taking advantage of the rich information contained in successfully closed deals that are similar to yours. Here are some guidelines to help you find the opportunities that will help you close your deals.

Considerations for Creating Opportunities

Review these key points to better understand what happens when you create opportunities.

Contacts and Contact Roles

- To associate an opportunity with an account or contact, you must have at least read access to the account or contact.

Divisions

If your organization uses Divisions, the division of a new opportunity is automatically set to the division of the related account.

Forecasts

- In Professional, Enterprise, Unlimited, Performance, and Developer Editions, opportunities you create are given the forecast category that corresponds to the opportunity stage you assign by default. Your administrator correlates opportunity stages and forecast categories when editing the `Stage` picklist values.
- If the opportunity is set to close in a given month, as determined by the `Close Date`, the opportunity is automatically added to the forecast for that particular month, unless the forecast category on the opportunity is set to `Omitted`.

Multicurrency

If your organization uses multiple currencies, your opportunity amounts are initially shown in your personal currency. Change the `Opportunity Currency` picklist to track the sales revenue in another currency.

Opportunity Splits

When team selling and splits that total 100% are enabled, you're automatically added to the opportunity team and initially assigned 100% of the split.

Territory Management

If your organization uses territory management, opportunities that you create are automatically assigned a territory when both of the following conditions are met.

- You belong to or have edit privileges on the same territory as the account on the opportunity.

EDITIONS

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

Opportunity Splits available in: **Salesforce Classic**

Available in: **All Editions** for orgs activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions** for orgs activated after Summer '09

Opportunity Splits and territory management available in: **Performance and Developer Editions** and in **Enterprise and Unlimited Editions** with the Sales Cloud

- You have no other territories in common with that account. (Note that if you have the “Manage Territories” permission, you have access to all territories, including the parent territories of the account. In this case, you *do* have other territories in common with the account, unless the account is only assigned to a single top-level territory. No territory is assigned to the opportunity.) For example, if you are in the territories Berkeley and San Francisco and the account is in the territories Portland, San Francisco, and Seattle, the opportunity is assigned to the San Francisco territory.


Considerations for Sharing Opportunities

By sharing your opportunities with other user you give visibility into your pipeline so others can provide you with important information to help you close your deals. Before you share your opportunities, make sure you’re aware of these considerations.

- Your administrator determines your organization’s sharing model, including the default opportunity access levels for territories.
- While you can increase access to your opportunities, you can’t restrict it below your organization’s default access levels.
- To share an opportunity with another user, that user must have the “Read” permission on opportunities.
- The sharing detail page lists the users, groups, roles, and territories that have sharing access to the opportunity.

Considerations for Cloning Opportunities

Cloning an opportunity quickly creates an opportunity with the same information as the existing one. Before you clone Salesforce opportunities, make sure you’re familiar with these considerations.

- If you have read-only access to a field, the value of that field isn’t included in the cloned opportunity.
 - If the opportunity has an associated opportunity team, the team isn’t included in the cloned opportunity.
 - If the opportunity has any associated products that contain unique custom fields, delete the values in the custom fields before cloning the opportunity.
 - If the clone button isn’t visible, you might not have permission to create opportunities, or your Salesforce admin might have removed it from the page layout. Ask your Salesforce admin for help.
 - In Lightning Experience, opportunities with products can’t be cloned.
-  **Note:** If you have read-only access to a field, the value of that field is not carried over to the cloned record.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions for organizations activated before Summer ‘09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer ‘09

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions for organizations activated before Summer ‘09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer ‘09

Move an Opportunity to the Next Stage

Update your deal as it moves closer to closing. Accurate stage information is important for forecasting, reporting, and ultimately meeting your quota.

[Move an Opportunity to the Next Stage in Salesforce Lightning Experience](#)


Update your opportunity stage directly from its record or from the Opportunity Kanban view.

[Move an Opportunity to the Next Stage in Salesforce Classic](#)

Track opportunity progress as you get closer to closing your deal.

Move an Opportunity to the Next Stage in Salesforce Lightning Experience

Update your opportunity stage directly from its record or from the Opportunity Kanban view.

-  **Note:** These steps work in Lightning Experience. If you see the App Launcher icon (☰) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.
- From an open opportunity, select the new stage on the Sales Path and then click **Mark as Current**.
- From an open opportunity, click **Mark Stage as Complete**.
- From the Opportunity Kanban view, find the opportunity whose stage you want to update and drag its card to the next stage column.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To create opportunities:


- Create on Opportunities

To view opportunities:

- View on Opportunities

Move an Opportunity to the Next Stage in Salesforce Classic

Track opportunity progress as you get closer to closing your deal.

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

1. Edit the opportunity record you want to update.
2. Select the new stage.
3. Save the record.

Review an Opportunity's History

Field History lets you track the changes made to an opportunity, including changes to the stage, so you can quickly see who changed the opportunity and when.

There are two related lists that track changes to the fields on an opportunity record.

Opportunity Field History

Any time a user modifies any of the standard or custom opportunity fields that are set to be tracked, a new entry is added to the Opportunity Field History related list. All entries include details of the change and who made it. Your administrator can choose which fields to track.

Stage History

Any time a user changes the `Amount`, `Probability`, `Stage`, or `Close Date` fields, a new entry is added to the Stage History related list. All entries include details of the change and who made it. Your administrator can't choose which fields to track.

Changes to the `Amount` and `Quantity` fields are tracked even when the field is updated as the result of a change to an opportunity's products or schedules.

EDITIONS

Available in: **Salesforce Classic**

Available in: **All Editions** for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

USER PERMISSIONS

To create opportunities:

- Create on Opportunities

To view opportunities:

- View on Opportunities

EDITIONS

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

Available in: **All Editions** for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

USER PERMISSIONS

To view opportunities:

- Read on opportunities

Considerations for Deleting Opportunities

Before you delete Salesforce opportunities, make sure you're familiar with these considerations.

- You can delete an opportunity if you're an administrator, the opportunity owner, or a user above the opportunity owner in the organization role hierarchy, and you have the "Delete" permission on opportunities.
- When you delete an opportunity, all related notes, attachments, quotes, quote line items, quote PDF files, events and tasks, partner relationships, competitor strengths/weaknesses, contact roles, and stage history are deleted.
- The deleted opportunity is moved to the Recycle Bin and can be restored. If you restore the opportunity, any related items are also restored.
- Associated contacts and accounts are not deleted with the opportunity.

Schedule Reminders to Update Opportunities

To ensure your team is keeping their opportunities up to date, create an automated email that contains a report of your team's open opportunities and send it to your direct reports.

For example, you can schedule a weekly report of all the opportunities for the current fiscal quarter owned by anyone on the team and have the report distributed to everyone on the team.

1. Make sure that opportunity update reminders are enabled.
2. From your personal settings, enter *Reminder* in the **Quick Find** box, then select **My Update Reminder**.
3. Check **Active** if you want reminders to start after you save the settings.
4. Enter a name and address for the sender of the reminders.
5. Choose a recipients option.
6. Enter any other recipients in the **CC** field. Separate email addresses with commas, semi-colons, spaces, or new lines.
7. Enter a subject and message to be included in the email reminders.
8. Select a schedule frequency.
9. Select **Include Past Due Opportunities** to include all open opportunities that have a closing date within 90 days before the specified **Close Date**.
For example, suppose that your organization uses a normal fiscal year and the current quarter started on 4/1/2012. You configure update reminders for opportunities closing in the current quarter and then select **Include Past Due Opportunities**. When the update reminder is sent on 6/15, it includes all opportunities from 4/1 to 6/15. It also includes open opportunities with a closing date between 1/2 and 4/1 (there are 91 days in Q1).
10. Choose a **Close Date** to include opportunities with dates within that range.
11. Select the fields to include in the email reminders.

Field	Description
Last Login Date	Most recent login date of the opportunity owner

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All Editions** for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
# of Open Opportunities	Total number of opportunities in the report
# Not Updated in Last 30 Days	Total number of opportunities that have not been updated in 30 days
Open Opportunity Amount	Total of all opportunity amounts in report
Total Closed Amount	Total closed amount for all opportunities in report. If your organization uses multiple currencies, this amount is converted to the user's currency. If your organization uses advanced currency management, the conversion is done using dated exchange rates.
Last Update Date	Most recent date the opportunity owner submitted a forecast. If your organization uses multiple currencies, this amount is converted to the user's currency. If your organization uses advanced currency management, the conversion is done using dated exchange rates.

12. Click **Save**.

When there are no records in an opportunity update reminder, Salesforce doesn't send an email. If no email is sent for three consecutive opportunity update reminders, the scheduled reminder is deactivated.

Guidelines for Finding Similar Opportunities

Close your deals faster by taking advantage of the rich information contained in successfully closed deals that are similar to yours. Here are some guidelines to help you find the opportunities that will help you close your deals.

- Use the Similar Opportunities related list on the opportunity's detail page to find Closed/Won opportunities with common information.
- The criteria used to find similar opportunities is determined by your administrator. The search finds a maximum of 10,000 opportunities with close dates in a three-month period and displays up to 300 of the records that best match the search criteria. The results are ranked by the number of matching fields.
- Results can be filtered by Close date or by matching fields.
- To see how a record in the search results is similar to your current deal, hover over the opportunity name. The matching fields are highlighted in the Match Criteria sidebar.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions for organizations activated after Summer '09

Manage Opportunity Products

Manage the products associated with your opportunities.

[Make It Easy to Add Products to Opportunities](#)

Set up Salesforce to prompt your users to add products when they create an opportunity. When you select `Prompt users to add products to opportunities` in Opportunity Settings, the label for the save button in a new opportunity record is "Save & Add Product."

[Add and Edit Products on Opportunities](#)

Track what's selling and in what quantity by adding products to opportunities. Then make sure that you maintain accurate records by updating the quantities and prices of the products.

[Restrict Price and Quantity Editing on Opportunity Products](#)

Control whether users can update the `Price` and `Quantity` fields on opportunities.

[Considerations for Adding Products to Opportunities](#)

If you're an admin or sales operations manager, consider key concepts before you add products to opportunities.

Make It Easy to Add Products to Opportunities

Set up Salesforce to prompt your users to add products when they create an opportunity. When you select `Prompt users to add products to opportunities` in Opportunity Settings, the label for the save button in a new opportunity record is "Save & Add Product."

EDITIONS

Available in: Salesforce Classic

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

Add and Edit Products on Opportunities

Track what's selling and in what quantity by adding products to opportunities. Then make sure that you maintain accurate records by updating the quantities and prices of the products.

1. Navigate to the opportunity that you want to edit.
2. From the Products related list, either select **Edit** next to the product you want to modify or select **Add Product** to add a new product. If you're adding the first product, choose a price book for the opportunity.
3. When adding a new product, select one or more products from the list, or search for a product.
4. Enter the attributes for each product. Admins can customize this page to include fields that are specific to your business.
5. Enter the `Sales Price` for the product. The sales price defaults to the list price that's specified in the price book that's assigned to the opportunity. Depending on your user permissions, you can override this value.
6. If the product has a discount, type the discount as a number with or without the percent sign (%) in the `Discount` field. If the `Discount` field isn't available, check with your administrator.
7. Enter the number of products at this price in the `Quantity` box.
8. Save your changes.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add or edit opportunity products:

- Edit on opportunities

AND

Read on products and price books

Restrict Price and Quantity Editing on Opportunity Products

Control whether users can update the `Price` and `Quantity` fields on opportunities.

Although `Sales Price` and `Quantity` fields are required, you can remove them from the page layout and they will be populated with a default value. Users will no longer see the fields or be able to add data to them.

To ensure that opportunity products use the price from the associated price book, remove the `Sales Price` field from the opportunity products page layout.

To use a quantity of one for all opportunity products, remove the `Quantity` field from the opportunity products page layout.

 **Note:** If you cannot remove these fields from the page layout, contact Salesforce to enable this option.

Considerations for Adding Products to Opportunities

If you're an admin or sales operations manager, consider key concepts before you add products to opportunities.

- The opportunity `Amount` is the sum of the products that you add to the opportunity. You can't edit the `Amount` unless you delete the products from the opportunity.
- The total price is the quantity multiplied by the sales price.
- You can add products with schedules in Lightning Experience or the Salesforce app, but must switch back to Salesforce Classic to enable product schedules, or to establish or modify schedules for products.
- For multicurrency orgs, the opportunity `Currency` is tied to the currency of the associated price book entry. You can't edit the `Currency` unless you delete the products from the opportunity.

Track Your Competitors

Track competitors in a pending sale by listing the competitors' names in the opportunity. You can enter the names of new competitors, or choose from a list of competitors defined by your administrator. To access this information, go to the Competitors related list of the opportunity.

To add, edit, or delete competitors on an opportunity, you must have Edit access on the opportunity.

[Define Competitors](#)

Create a picklist of competitors that your users can attach to opportunities.

[Competitor Fields](#)

The fields for competitors help you track your competition as you work to close deals.

SEE ALSO:

[Define Competitors](#)

[Competitor Fields](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To restrict price and unit editing:

- [Customize Application](#)

EDITIONS

Products and price books available in: both Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

Define Competitors

Create a picklist of competitors that your users can attach to opportunities.

1. From Setup, enter *Competitors* in the **Quick Find** box, then select **Competitors**.
2. Click **New** to add competitor names to the list.
3. Enter the name of the competitor.
4. Optionally, check the default option to select this value on any new record when another value is not selected.
5. Click **Save**.

SEE ALSO:

[Track Your Competitors](#)

Competitor Fields

The fields for competitors help you track your competition as you work to close deals.

A competitor has the following fields, listed in alphabetical order.

Field	Description
Competitor Name	Name of competitor. You can enter any name, or select from the list of all competitors defined by your administrator.
Strengths	Description of competitor's key selling points and advantages.
Weaknesses	Description of competitor's key disadvantages.

SEE ALSO:

[Track Your Competitors](#)

Things to Know About Opportunities

Review considerations, guidelines, and tips for opportunities.

Opportunity Fields

The fields for opportunities contain a wide variety of information to help you track your pending and potential sales. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

USER PERMISSIONS

To define competitors:

- Customize Application

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

Opportunity Product Fields

The fields for opportunity products contain information to help you track what's selling. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

Opportunity Fields

The fields for opportunities contain a wide variety of information to help you track your pending and potential sales. Depending on your page layout and field-level security settings, some fields may not be visible or editable.


Field	Description
Account Name	<p>Name of account that opportunity is linked to. You can enter the account name, or select the account using the lookup icon.</p> <p>If you change the account for an opportunity that has partners, all partners are deleted from the Partners related list.</p>
Amount	<p>Estimated total sale amount. For organizations using multiple currencies, the amount is shown in your personal currency by default. Change the <code>Opportunity Currency</code> picklist to track the amount in another currency.</p> <p>For opportunities with products, the amount is the sum of the related products. You cannot directly edit the amount unless the opportunity has no products. To change the amount for an opportunity that contains products, edit the sales price or quantity of the related products.</p> <p>If you change the price book for an opportunity that has products, all products are deleted from the Products related list, but the value in the opportunity's Amount field remains.</p>
Close Date	<p>Date when you plan to close the opportunity. You can enter a date, or choose a date from the calendar that displays when you put your cursor in the field.</p> <p>Opportunities with a <code>Close Date</code> in a given month will tally in the forecast for that month, unless you assign them to the Omitted category while editing the forecast.</p> <p>When you set an open opportunity's <code>Stage</code> to a type of "Closed/Won," the <code>Close Date</code> is set to the current date in Coordinated Universal Time (UTC) if the original date was in the future. At certain times of day, UTC will differ</p>

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
	by one day from your time zone. If the close date was in the past when the opportunity is closed, the date does not change.
Contract	Contract that the opportunity is linked to.
Created By	User who created the opportunity including creation date and time. (Read only)
Custom Links	Listing of custom links for opportunities as set up by your administrator. Available only in Salesforce Classic.
Description	Description of the opportunity. Up to 32KB of data are allowed. Only the first 255 characters display in reports.
Expected Revenue	Calculated revenue based on the <code>Amount</code> and <code>Probability</code> fields.
Forecast Category	Forecast category name that is displayed in reports, opportunity detail and edit pages, opportunity searches, and opportunity list views. The setting for an opportunity is tied to its <code>Stage</code> .
Last Modified By	User who last changed the opportunity fields, including modification date and time. This does not track changes that are made to any of the related list items on the opportunity. (Read only)
Lead Source	Source of the opportunity, for example, Advertisement, Partner, or Web. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
Next Step	Description of next task in closing opportunity. Up to 255 characters are allowed in this field.
Opportunity Currency	<p>The default currency for all currency amount fields in the opportunity. Amounts are displayed in the opportunity currency, and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.</p> <p>For opportunities with products, the currency is tied to the currency of the associated price book. You cannot directly edit this field unless you first delete the products.</p>
Opportunity Division	<p>Division to which the opportunity belongs. This value is automatically inherited from the related account.</p> <p>Available only in organizations that use divisions to segment their data.</p>
Opportunity Name	Name of the opportunity, for example, Acme.com - Office Equipment Order. Up to 120 characters are allowed in this field.
Opportunity Owner	Assigned owner of opportunity. Not available in Personal Edition.

Field	Description
Opportunity Record Type	Name of the field that determines what picklist values are available for the record. The record type may be associated with a sales process. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.
Partner Account	Read-only field that indicates the opportunity is owned by a partner user.
Primary Campaign Source	<p>Name of the campaign responsible for generating the opportunity.</p> <p>For opportunities created during lead conversion, this field is automatically filled in with the campaign name from the lead. If the lead has multiple associated campaigns, the campaign with the most recently updated member status is inserted into the opportunity.</p> <p>For opportunities with multiple influential campaigns, click Edit next the primary campaign in the Campaign Influence related list on the opportunity detail page and select the <code>Primary Campaign Source</code> checkbox. The campaign will display in the <code>Primary Campaign Source</code> field on the opportunity.</p>
Private	<p>Indicates that the opportunity is private. Only the record owner, users above that role in the hierarchy, and administrators can view, edit, and report on private opportunities. Not available in Group or Personal Editions. Private opportunities do not trigger Big Deal Alerts or workflow rules. Private opportunities count towards your forecasts only if you have Customizable Forecasting or Collaborative Forecasts enabled. Users with the "View All Forecasts" permission can see private opportunities within the Forecasts tab.</p> <p> Note: When you mark opportunities <code>Private</code>, any opportunity teams, opportunity splits, and sharing are removed. (The owner of a private opportunity receives 100% of split types that total that amount.)</p>
Probability	<p>Likelihood that opportunity will close, stated as a percentage.</p> <p>The <code>Probability</code> value is always updated by a change in the <code>Stage</code> value, even if <code>Probability</code> is marked as read only on your page layout. Users with access to edit this field can override the value.</p>
Quantity	Total of all <code>Quantity</code> field values for all products in the Products related list if the opportunity has products. General use field if the opportunity does not have products.
Stage	Current stage of opportunity based on selections you make from a predefined list, for example, Prospect or Proposal. Entry is selected from a picklist of up to 100 available values, which are set by an administrator. Each picklist value can have up to 40 characters.

Field	Description
	<p>Your administrator correlates the values in this picklist with Forecast Category values that determine how the opportunity contributes to your forecast.</p> <p>When you set an open opportunity's <code>Stage</code> to a type of "Closed/Won," the <code>Close Date</code> is set to the current date in Coordinated Universal Time (UTC) if the original date was in the future. At certain times of day, UTC will differ by one day from your time zone. If the close date was in the past when the opportunity is closed, the date does not change.</p>
Synced Quote	Quote that's synced to the opportunity. Only one quote can sync to the opportunity at a time.
Territory	Territory with which the opportunity is associated. Only available if your organization has territory management.
Type	Type of opportunity, for example, Existing Business or New Business. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.

Opportunity Product Fields

The fields for opportunity products contain information to help you track what's selling. Depending on your page layout and field-level security settings, some fields may not be visible or editable.

Field	Description
Active	Whether the price book entry (product and list price) is active and can be added to an opportunity or quote.
Created By	Name of the user who created the product.
Date	Close date of a particular opportunity product.
Discount	Discount for the product as a percentage.
Last Modified By	User who last changed the opportunity product fields. (Read only)
Line Description	Text to distinguish this opportunity product from another.
List Price	The price of the product within the price book, including currency.
Opportunity	Name of the opportunity for this opportunity product.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Field	Description
Product	Item listed in the Products related list on an opportunity.
Product	The product's name.
Quantity	Number of units for the opportunity product.
Sales Price	Price for the products in the opportunity product.
Subtotal	Difference between standard and discounted pricing. Converted currency amounts when the opportunity's currency is different from the user's currency.
Total Price	Sum of all the product amounts for this opportunity product.

Quotes

Quotes in Salesforce represent the proposed prices of your company's products and services. You create a quote from an opportunity and its products. Each opportunity can have multiple associated quotes, and any one of them can be synced with the opportunity. When a quote and an opportunity are synced, any change to line items in the quote syncs with products on the opportunity, and vice versa. Get an overview of all your quotes on the Quotes tab. And if you're using Lightning Experience, track sales activity in Path and stages in Kanban.

[Set Up Quotes](#)

Make it easy for your sales reps to show your customers the prices of the products and services that your company offers.

[Set Up Quote Templates](#)

Quote templates let you customize the way your sales reps quote your company's products and services. Sales reps can select standard or customized quote templates from their quote records, generate quote PDFs, and email them to customers.

[Manage Your Quotes](#)

Show your customers the prices of the products and services that you offer. Sync quotes and opportunities so your information stays up to date.

[Create and Email Quote PDFs](#)

Provide quotes to your customers the easy way: via PDF. Create quote PDFs from a standard template or from your company's design. Email quotes to your customers. Then delete quotes that you no longer need.

[Things to Know About Quote Templates](#)

Review considerations and guidelines for working with quote templates.

[Things to Know About Quotes](#)

Review considerations for working with quotes.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS

To view quotes:

- Read on Quotes

To create quotes:

- Create on Quotes

To add quote line items:

- Edit on Quotes

AND

Read on Products and Price Books

Set Up Quotes

Make it easy for your sales reps to show your customers the prices of the products and services that your company offers.

1. From Setup, enter `Quote` in the `Quick Find` box, then select **Quote Settings** (Lightning Experience) or **Quotes Settings** (Salesforce Classic).
2. Select the option for enabling quotes.
3. To display the Quotes related list on the standard opportunity page layout, select `Opportunity Layout`.
4. To add the Quotes related list to all opportunity page layouts that users have customized, select `Append to users' personal related list customization`.
5. Save your changes.

 **Note:** You can't disable the Quotes feature if:

- Your records have any references to quotes, quote line items, or quote PDFs from any application customizations, including formula fields, triggers, workflow rules, and approval processes. Remove these references before you try to disable the feature.
- Any quote is synced with an opportunity. On each synced quote's detail page, choose to stop syncing before you try to disable the feature.

SEE ALSO:

[Quotes](#)

Set Up Quote Templates

Quote templates let you customize the way your sales reps quote your company's products and services. Sales reps can select standard or customized quote templates from their quote records, generate quote PDFs, and email them to customers.

[Create, Preview, and Activate Quote Templates](#)

Define the look of your company's quote PDFs by creating templates that your sales reps can choose when they create quote PDFs.

[Add Rich Text to a Quote Template](#)

Include text that you can format, such as your company's address or terms and conditions, in your quote template's body, header, or footer.

[Add a List to a Quote Template](#)

Arrange and display fields from a quote line item or any other standard or custom object that has a lookup relationship to the quote object. The added list looks like a table, with field names appearing as columns.

[Add an Image to a Quote Template](#)

Show an image, such as your company logo, in your quote template's body, header, or footer.

[Add a Totals Section to a Quote Template](#)

Include subtotal and grand total amounts for your quote.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS

To enable or disable quotes:

- [Customize Application](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

[Add a Signature Block to a Quote Template](#)

Create signature and date lines so that customers can easily sign off on their quotes.


Create, Preview, and Activate Quote Templates

Define the look of your company's quote PDFs by creating templates that your sales reps can choose when they create quote PDFs.

Watch a Demo: [▶ Creating Quote Templates \(Salesforce Classic\) \(English only\)](#)

1. From Setup, enter *Templates* in the **Quick Find** box, then select **Quote Templates** (Lightning Experience) or **Templates** under Quotes (Salesforce Classic).
2. Click **New**, and then select a template, such as *Standard Template*, on which to base your new template.
3. Give your new template a name, and then click **Save**.
4. In the template editor, drag the elements that you want to the template, and then complete the details. To add:
 - One or more Quote fields or fields from related objects, use a section and add fields to it.
 - Text that you can edit and format, such as terms and conditions, use **Text / Image Field**.
 - An image, such as your company logo, use **Text / Image Field**.
 - A table of Quote fields or fields from a different object, such as Quote Line Item, use a list.
5. Click **Quick Save** to save your changes and continue working on the template.
6. Click **Save and Preview** to make sure that the quote PDFs that users create look the way you want them to.

Preview shows templates in system administrator profile view. The preview and the template show the rich text and images that you've added. Other data is simulated.

 **Important:** **Save and Preview** saves changes to your template, so after you preview, you can't undo them.

7. Click **Save** when you're finished.
8. Return to the Quote Templates page, and then click **Activate**.

SEE ALSO:

[Quote Template Fields](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS

To create quote templates:

- Customize Application

To view quote templates:

- View Setup and Configuration

Add Rich Text to a Quote Template

Include text that you can format, such as your company's address or terms and conditions, in your quote template's body, header, or footer.

1. Drag `Text/Image Field` into place in the header, the footer, or any section in the body.
2. Type or paste your text into the field.
3. Format the text as needed.
4. Click **OK**.

SEE ALSO:

[Guidelines for Using the Quote Templates Editor](#)

[Add an Image to a Quote Template](#)

Add a List to a Quote Template

Arrange and display fields from a quote line item or any other standard or custom object that has a lookup relationship to the quote object. The added list looks like a table, with field names appearing as columns.

A list can include up to 10 fields.

 **Note:** You can't add lists to the header or footer of your quote template.

1. Drag a list from the palette to the template.
2. Enter a title for the list. To suppress the title from appearing on the template or PDF, select **Hide Title**.
3. In the `Object` field, select the object whose fields you want to appear in the list.
4. Use the **Add** and **Remove** arrows to move columns from the Available Fields list to the Selected Fields list. Use the **Up** and **Down** arrows to change the order of the columns.
5. Click **OK**.

SEE ALSO:

[Guidelines for Using the Quote Templates Editor](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS

To create quote templates:

- Customize Application

To view quote templates:

- View Setup and Configuration

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS

To create quote templates:

- Customize Application

To view quote templates:

- View Setup and Configuration

Add an Image to a Quote Template

Show an image, such as your company logo, in your quote template's body, header, or footer.

Before you begin, review key [considerations](#).


Insert an Uploaded Image

1. To use an image that's stored in Salesforce CRM Content, locate the image, and then download it to your local file directory.
2. Drag `Text/Image Field` into place in the header, the footer, or any section in the body.
3. Click the image icon, click **Choose File**, and then select the image in your file directory.
4. Click **Open** and then **Insert**.

The image appears in the field. To resize it, drag the sizing handles, which show the image's height and width in pixels.


5. Click **OK**.
6. To see how the image looks in PDFs that are created from the template, click **Save and Preview**.
7. To suppress the title from appearing on the template or PDF, select **Hide Title** in Section Properties.

Insert an Image from a Salesforce Web Address

1. If you need to, upload the image to the Documents tab, or define a static resource.
2. Drag `Text/Image Field` into place in the header, the footer, or any section in the body.
3. To suppress the title from appearing on the template or PDF, select **Hide Title**.
4. Click **OK**.
5. On the Documents tab or the Static Resources page, open the image's detail page, click **View File**, and then copy its URL.
6. In the quote template editor, click  in the title bar of `Text/Image Field`.
7. Click the image icon, and then click the Web Address tab.
8. Paste the URL into the URL field, and then click **Insert**.

The image appears in the field. You can resize it by dragging the sizing handles, which show the image's height and width in pixels.

9. Click **OK**.
10. To see how the image looks in PDFs that are created from the template, click **Save and Preview**.

 **Important:** If the image is removed from the Documents tab or Static Resources page where it's stored, the template displays a message that the image isn't available. Restore the image, open the template, delete the error message image, and then paste the URL again.

SEE ALSO:

[Guidelines for Using the Quote Templates Editor](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS

To create quote templates:


- Customize Application

To view quote templates:

- View Setup and Configuration

Add a Totals Section to a Quote Template

Include subtotal and grand total amounts for your quote.

1. Do either of the following.
 - a. Select *Standard Template* when you create a template, and then modify the totals section as needed.
 - b. Drag a section onto the layout of any template, and then drag total-related fields (such as `Subtotal` and `Grand Total`) to the right half of the section. If you're placing the section directly below a list, hide the title.
2. Click , and then select right field alignment.
3. Save your changes.

SEE ALSO:

[Guidelines for Using the Quote Templates Editor](#)

Add a Signature Block to a Quote Template

Create signature and date lines so that customers can easily sign off on their quotes.

1. Drag `Text/Image Field` into the footer of your template. To right-align your signature block, or to create two signature blocks, use two columns.
2. Enter a label for each line that you want to create. For example, enter *Signature*, *Name*, *Title*, or *Date*.
3. To create a line where the customer can sign or write other information, press and hold the underscore key.
4. Click **OK**.
5. Save your changes.

SEE ALSO:

[Guidelines for Using the Quote Templates Editor](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS

To create quote templates:

- Customize Application

To view quote templates:

- View Setup and Configuration

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS

To create quote templates:

- Customize Application

To view quote templates:

- View Setup and Configuration

Manage Your Quotes

Show your customers the prices of the products and services that you offer. Sync quotes and opportunities so your information stays up to date.

Create and Manage Quotes

Create quotes to show your customers the prices of the products and services that you offer. Create a set of quotes to show different combinations of products, discounts, and quantities so customers can compare prices. Then add products as needed to keep your quotes up to date.

How Quote Syncing Works

Quote syncing lets you link a quote to the opportunity that it was created from and synchronize all updates between the two records. An opportunity can have multiple quotes, but it can sync with only one quote at a time.

Sync Quotes and Opportunities

Link a quote to the opportunity that it was created from. That way, updates to one record are always reflected in the other.

Create and Manage Quotes

Create quotes to show your customers the prices of the products and services that you offer. Create a set of quotes to show different combinations of products, discounts, and quantities so customers can compare prices. Then add products as needed to keep your quotes up to date.

1. Click **New Quote** on the Quotes related list on an opportunity. The `Subtotal`, `Discount`, `Total Price`, and `Grand Total` fields show values from the opportunity.
2. Complete the fields.
3. Save your changes.
 - A unique quote number is added.
 - Products on the opportunity are copied to the quote as line items.
 - The grand total is recalculated based on the taxes and shipping information that you entered.

To add a line item to a quote:

1. Click **Add Products** (Lightning Experience) or **Add Line Item** (Salesforce Classic) in the Quote Line Items related list.
2. If no price book was selected on the opportunity, select a price book for the quote. Otherwise, the quote uses the opportunity's price book.
3. Enter search criteria in the lookup to locate a line item.
4. Select the products that you want to add, and then click **Next** (Lightning Experience) or **Select** (Salesforce Classic).
5. Complete the fields. The sales price defaults to the product's list price as recorded in the price book. Depending on your permissions, you can edit the sales price.
6. Save your changes.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS

To view quotes:

- Read on Quotes

To create quotes:

- Create on Quotes

To add quote line items:

- Edit on Quotes

AND

Read on Products and Price Books

The line items are added to the Quote Line Items related list. The grand total in the detail section is the sum of the related line items. The discount is the average discount for the line items.

SEE ALSO:

[Considerations for Creating and Managing Quotes and Quote Line Items](#)

[Create and Email Quote PDFs](#)

How Quote Syncing Works

Quote syncing lets you link a quote to the opportunity that it was created from and synchronize all updates between the two records. An opportunity can have multiple quotes, but it can sync with only one quote at a time.

While a quote and an opportunity are synced, any addition or change to the list of products in one record syncs with the list of products in the other one. Adding or removing a line item from a quote updates the synced opportunity's Products related list. Adding or removing a product from the opportunity updates the synced quote's Quote Line Items related list. Product sorting also syncs between the two records. The quote and opportunity continue to sync each way until you stop syncing or delete one of the records.

You can sync quotes and opportunities that don't have any products. When you add a product to either record, it's automatically added to the record that it's synced to.

If an opportunity and a quote are synced, the opportunity identifies the synced quote in the following places.

- The Synced Quote field on the Opportunity detail page
- The Syncing checkbox in the Quotes related list

You can't edit the opportunity's Amount field, even if you stop syncing.

If you replace the synced quote with another synced quote, the existing opportunity line items are replaced by the newly synced quote records.

If you stop the sync between a quote and an opportunity, the link is broken and the records are no longer automatically updated with each other's changes.

SEE ALSO:

[Sync Quotes and Opportunities](#)

[Troubleshooting Quote Syncing](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

Sync Quotes and Opportunities

Link a quote to the opportunity that it was created from. That way, updates to one record are always reflected in the other.

1. Open the quote that you want to sync, and then click **Start Sync**.
2. Follow the prompts until the quote and opportunity are synced.
The opportunity's `Synced Quote` field and quotes related list identify the quote that's synced.
3. To stop syncing between a quote and an opportunity, open the synced quote, and then click **Stop Sync**.
Updates are no longer synced between the records.
4. To sync a different quote with an opportunity, follow the steps for syncing a quote.
The previously synced quote stops syncing, and the new quote starts.

SEE ALSO:

[How Quote Syncing Works](#)

[Troubleshooting Quote Syncing](#)

Create and Email Quote PDFs

Provide quotes to your customers the easy way: via PDF. Create quote PDFs from a standard template or from your company's design. Email quotes to your customers. Then delete quotes that you no longer need.

[Create a Quote PDF from the Standard Template](#)

Quickly create quote PDFs from the standard templates.

[Create a Quote PDF by Selecting a Template](#)

Select from the available templates to create a PDF.

[Email Quote PDFs](#)

Email quotes to your customers.

SEE ALSO:

[Considerations for Creating Quote PDFs](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS

To sync quotes:

- Create on quotes

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

USER PERMISSIONS

To create or email quote PDFs:

- Edit on quotes

Create a Quote PDF from the Standard Template

Quickly create quote PDFs from the standard templates.

If you haven't created custom templates or generated PDFs, start from the standard template.

1. On the quote detail page, generate a preview by clicking **Create PDF**.
2. Save the PDF to the Quote PDFs related list by clicking **Save to Quote**. The PDF name is the quote name plus a version number, such as *AcmeQuote_V1*.

Create a Quote PDF by Selecting a Template

Select from the available templates to create a PDF.

1. Do one of the following.
 - If you're using Lightning Experience, click **Create PDF**, and then choose a template from the dropdown list.
 - If you're using Salesforce Classic, click the **Create PDF** dropdown list, and then select a template from the Recent Templates list, or click *Choose Template* and search for the template that you want to use.
2. Generate a preview by clicking **Create PDF**.
3. Save the PDF to the Quote PDFs related list by clicking **Save to Quote**. The PDF name is the quote name plus a version number, such as *AcmeQuote_V1*.

Email Quote PDFs

Email quotes to your customers.

[Email Quote PDFs and Other Documents in Lightning Experience](#)

Make it easy for your customers to compare. Email one or more quote PDFs and other documents at the same time in Lightning Experience.

[Email a Quote PDF in Salesforce Classic](#)

Email a quote for your customer's approval in Salesforce Classic.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

Email Quote PDFs and Other Documents in Lightning Experience

Make it easy for your customers to compare. Email one or more quote PDFs and other documents at the same time in Lightning Experience.

1. Click **Send Email** on a quote's activity timeline, or click **Email PDF** next to a quote in the Quote PDFs list view. An email task opens.
2. Enter the customer's email address, a subject, and body text.
3. Click **Attach file**, add quotes and other documents one at a time, and then send.

Email a Quote PDF in Salesforce Classic

Email a quote for your customer's approval in Salesforce Classic.

1. Click the email option on the PDF preview, on the quote detail page, or next to the PDF in the Quote PDFs related list. An email task opens with the current quote PDF attached.
2. Enter the customer's email address, a subject, and body text, and then send.

Things to Know About Quote Templates

Review considerations and guidelines for working with quote templates.

[Considerations for Creating Quote Templates](#)

Before you create a quote template, consider a few key points.

[Guidelines for Using the Quote Templates Editor](#)

While you're creating and editing quote templates, refer to key guidelines for additional information.

[Considerations for Adding Images to Quote Templates](#)

Before you add images to quote templates, consider a few key points.

[Quote Template Fields](#)

If you're working with quote templates, review details about quote template fields.

[Quote Template and PDF Limitations](#)

Limitations for quote templates and PDFs.

EDITIONS

Available in: **Lightning Experience**

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional, Enterprise, and Unlimited** Editions

EDITIONS

Available in: **Salesforce Classic**

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional, Enterprise, and Unlimited** Editions

EDITIONS

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

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional, Enterprise, and Unlimited** Editions

Considerations for Creating Quote Templates

Before you create a quote template, consider a few key points.

- Quote PDFs don't support right-to-left languages. The text aligns to the left side of the page.
- Text formatting isn't available in the `Text/Image Field` for Unicode languages such as Arabic and Japanese. To make these languages visible in plain text, contact Salesforce and ask to enable the feature for foreign character support for rich text area fields in Quote PDFs.
- Advanced Currency Management isn't available with quotes.
- The maximum number of characters that you can use in the quotes template `Text/Image Field` is 32,000. This number includes the hidden HTML characters that are used to format text.
- Sometimes a field doesn't appear on the quote templates palette or on a PDF that's created from a template.
 - If the default value for the field exceeds 255 characters, quote templates can't include text areas or text fields.
 - If a user can't view or update a field because of field-level security settings, that field doesn't appear on PDFs that are created from a template, even if the template includes that field. Read-only fields appear on PDFs.
 - Fields that appear on a quote page layout but don't contain data for a given quote appear on the quote templates palette but not when a PDF is created.
 - Quote line item fields that don't contain data don't appear as columns in a list when a PDF is created, even if the template includes that field. For example, if no quote line items offer a discount, the `Discount` column doesn't appear, even if the list includes the `Discount` field.
 - If a related list isn't included on a quote page layout, it doesn't appear on the template palette or any PDFs for quotes that use that page layout.
 - If the currency of a product on an opportunity differs from the user's currency in a multicurrency org, currency fields for quotes and quote line items appear in both currencies. The product's currency is converted to the user's currency, and the converted amount appears in parentheses. Fields in quote custom reports appear in the report's currency. Currency fields include `Subtotal`, `Tax`, and `Grand Total`.
 - If you create a Developer or Developer Pro sandbox, templates that contain `Text/Image` fields can't be opened for editing within the sandbox.
- Fields within sections have different alignment than columns within lists, so if you place a totals section below a list, its field values won't align directly below the right-hand list values. For example, say your template includes a list of quote line items, including a Total Price column at the far right that shows the total for each line item. If you add a totals section beneath the list, and you include `Subtotal`, `Total Price`, and `Grand Total` fields, their values will show the total of all line items, but the amounts won't align directly below the list's Total Price column.

EDITIONS

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

Available in: **Performance and Developer Editions**

In Sales Cloud, also available in: **Professional, Enterprise, and Unlimited Editions**





SEE ALSO:

[Create, Preview, and Activate Quote Templates](#)

Guidelines for Using the Quote Templates Editor

While you're creating and editing quote templates, refer to key guidelines for additional information.




General Guidelines

- Click  beneath the palette at the top to expand or collapse it.
- In the left column, select an object to display its fields on the palette.
- Use `Quick Find` to easily locate items on the palette.
- To add an element to the template, drag it from the palette to the layout.
- To remove an element from the layout, drag it back to the palette, or hover over its title bar and click .
- For any section (including a header or footer), double-click its title bar or click  to:
 - Hide the section title.
 - Hide field labels. (Field names appear in gray in the quote template editor, but they don't appear on quote PDFs.)
 - Change the number of columns (one or two).
 - Adjust field alignment.
- To rename the template, click **Quote Template Properties**.
- To show field content without labels in quote template sections, headers, and footers, click , and then select the `Hide` checkbox.
- Use the `Blank Space` field to add vertical space anywhere on the template. Each `Blank Space` field adds five pixels of vertical space to the quote PDF.

 **Note:** The space in the quote template preview doesn't look the same as the space in the quote PDF.

Guidelines for Using Headers and Footers

A header or footer is essentially a section. You can add fields to it and show or hide its title. You can't remove a header or footer or add more sections to it.

- In the quote template editor, select an object, and then drag the fields that you want to the header or footer.
- To use an image, such as your company logo, or include extended information, such as terms and conditions, use `Text/Image Field`.
- To change the number of columns in your header or footer, click , and then select the number (one or two) that you want.
 - To display an image that spans the width of a page, use a one-column header or footer.
 - For terms and conditions text, use a one-column footer.
- To change field alignment within a column, click , and then select left or right alignment.
- To hide field labels, click , and then select the `Hide` checkbox.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

Considerations for Adding Images to Quote Templates

Before you add images to quote templates, consider a few key points.


- You can store images for uploading in your file system or in Salesforce CRM Content.
- If you store images on the Documents tab or the Static Resources page, you get a web address that you can use to insert the image.
- If you insert an image that's too large, it's cropped when users create quote PDFs from the template. To prevent cropping, click **Save and Preview** after you insert an image, and then resize the image as needed.
- To insert an image from a *public* web address outside the Salesforce application (such as your company's website), contact Salesforce and ask to have the public URL whitelisted for your Salesforce org.

SEE ALSO:

[Add an Image to a Quote Template](#)

Quote Template Fields

If you're working with quote templates, review details about quote template fields.

-  **Note:** To help you understand the information that you get when you select fields for your template, the Template Field Name column in the following table provides additional information that doesn't appear on PDFs that are created from the template.

Object	Object Field	Template Field Name	PDF Field Name
User	First Name, Last Name	Prepared By (Name)	Prepared By
User	Email	Prepared By (Email)	E-mail
User	Phone	Prepared By (Phone)	Phone
User	Fax	Prepared By (Fax)	Fax
Company Information	Address	Organization (Address)	Company Address
Quote Documents	Hidden. The date when the PDF was generated and saved in the quote documents object.	Quote PDF (Created Date)	Created Date

SEE ALSO:

[Create, Preview, and Activate Quote Templates](#)

EDITIONS

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Quote Template and PDF Limitations

Limitations for quote templates and PDFs.

Quote Template Limitations

In some cases, a field may not appear on the quote templates palette or on a PDF created from a template.

- Text fields can't be used on quote templates if the default value for the field exceeds 255 characters.
- If a user is unable to view or update a field because of field-level security settings, that field won't appear on PDFs created from a template, even if the template includes that field. Read-only fields will appear on PDFs.
- A field that appears on a quote page layout but does not have a value for a given quote will appear on the quote templates palette, but won't appear on PDFs created from that quote.
- Quote line item fields that don't contain data won't appear as columns in a list when a PDF is created, even if the template includes that field. For example, if no quote line items offer a discount, the `Discount` column won't appear, even if the list includes the `Discount` field.
- If a related list is not included on a quote page layout, it won't appear on the template palette or any PDFs for quotes that use that page layout.

Quote PDF Limitations

- Text fields displayed in a related list in a quote PDF are truncated to less than 256 characters. This limitation occurs on rich text area fields, other types of text fields, standard fields, and custom fields.
- Quote PDFs do not support right-to-left languages. The text aligns to the left side of the page instead of the right.

Things to Know About Quotes

Review considerations for working with quotes.

[Considerations for Deleting Quotes](#)

Before you delete a quote, it's a good idea to understand how deleting a quote affects quote-related PDFs and syncing with opportunities.

[Considerations for Creating and Managing Quotes and Quote Line Items](#)

Before you create a quote or work with quote line items, review a few key points.

[Considerations for Creating Quote PDFs](#)

Before you create quote PDFs, consider a few key points.

[Quotes Fields](#)

If you're troubleshooting quotes or working with custom fields, review the details about quote fields.

[Troubleshooting Quote Syncing](#)

Errors can occur when you try to sync quotes under certain conditions. Review common error messages, and learn how to resolve them. If you don't have the appropriate permissions, contact your Salesforce admin.

EDITIONS

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

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

Considerations for Deleting Quotes

Before you delete a quote, it's a good idea to understand how deleting a quote affects quote-related PDFs and syncing with opportunities.

- If you have the appropriate permissions, and you're an admin, the quote owner, or someone above the quote owner in the organization role hierarchy, you can delete quotes.
- When you delete a quote, here's what happens. All related PDFs, notes, and attachments are deleted. If the quote is synced with an opportunity, the record is removed from the opportunity's Quotes related list. The deleted quote is moved to the Recycle Bin (Salesforce Classic only).
- If you undelete a previously synced quote, it's no longer synced with the opportunity.

EDITIONS


Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

Considerations for Creating and Managing Quotes and Quote Line Items

Before you create a quote or work with quote line items, review a few key points.

-  **Note:** Your user permissions determine which tasks you can perform. See your Salesforce admin for help with any tasks that you can't perform on your own.
- Relevant price books, products, and [list prices](#) must be active in an opportunity before you can create a quote for the opportunity.
- Professional, Enterprise, Performance, Unlimited, and Developer Edition orgs can activate record types and ask you to choose a `Record Type` when creating a quote. Record types determine the picklist values and business processes that are available when you create or edit a record.
- If you use divisions (Salesforce Classic only), the division of a new quote is automatically set to the division of the related opportunity.
- If a quote is synced with an opportunity, and you add a line item to the quote, the new line item is copied to the opportunity as a product in the Products related list.
- If an opportunity is syncing with a quote, deleting the quote line item deletes the corresponding product from the opportunity's Products related list.
- Custom field syncing isn't supported. When a quote is created from the API, the quote line items aren't created based on the opportunity line items. New opportunity line items are created based on the quote line items.
- If a product has default schedules, the schedules aren't created when you add a line item to a quote. If the line item is copied from the opportunity, you can view the schedule from the opportunity. To change the schedule, edit the product record directly.
- If you have a quote line item with a discount, and the product has a default schedule on the product record or an individual schedule on the opportunity product record, you can't edit the `Discount` field of the line item.

EDITIONS

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Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

Considerations for Creating Quote PDFs


Before you create quote PDFs, consider a few key points.

- Quote PDFs don't support right-to-left languages. The text aligns to the left side of the page instead of the right.
- Text fields in a related list in a quote PDF are truncated to fewer than 256 characters. This limit occurs on rich text area fields, other types of text fields, standard fields, and custom fields.
- Your Salesforce admin determines which status is the default for new quotes and which statuses allow you to email a quote PDF. For example, your admin can prevent you from emailing a quote whose status is *In Review*.

Quotes Fields

If you're troubleshooting quotes or working with custom fields, review the details about quote fields.

These tables list the fields that make up a quote. Your page layout, field-level security settings, and Salesforce edition determine what fields are visible and editable. (Field-level security is available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.)

 **Note:** If the currency of a product on an opportunity differs from the user's currency in a multicurrency org, currency fields for quotes and quote line items appear in both currencies. The product's currency is converted to the user's currency, and the converted amount appears in parentheses. Fields in quote custom reports appear in the report's currency. Currency fields include `Subtotal`, `Tax`, and `Grand Total`.

Field	Description
Account Name	The name of the account that the quote's opportunity is linked to. (Read only.)
Additional To	Another address field. By default not displayed on the page layout.
Additional To Name	The name of the person or company that's associated with the additional address.
Bill To	The billing address for the account that's associated with the quote.
Bill To Name	The name of the person or company that the quote is billed to.
Contact Name	The name of the contact that's associated with the quote. By default, this contact is the primary contact on the opportunity.
Contract	The contract that's associated with the quote.

EDITIONS

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EDITIONS

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In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

Field	Description
Created By	The user who created the quote, including the creation date and time. (Read only.)
Description	The description of the quote, or notes to help you differentiate between quote versions.
Discount	The weighted average of all line item discounts on the quote. Can be any positive number up to 100. (Read only.)
Email	The email address of the contact who's associated with the quote. If available, automatically completed when you add a contact.
Expiration Date	The date when this quote is no longer valid.
Fax	The fax number for the contact who's associated with the quote. If available, automatically completed when you add a contact.
Grand Total	The total price of the quote plus shipping and taxes. (Read only.)
Last Modified By	The user who most recently changed the quote, including the modify date and time. (Read only.)
Line Items	The number of line items on the quote.
Opportunity Name	The name of the opportunity that's associated with the quote. (Read only.)
Owner	The owner of this quote. Quotes can have a different owner than their parent opportunity. (Read only.)
Phone	The phone number of the contact who's associated with the quote. If available, automatically completed when you add a contact.
Quote Name	The quote's name.
Quote Number	A system-generated number that identifies the quote. (Read only.)
Quote To	The address to send the quote to for approval, such as the address of a third-party agency that represents a buyer. By default not displayed on the page layout.
Quote To Name	The name of the entity (such as a person or business) that the quote is sent to for approval.
Record Type	The name of the field that determines what picklist values are available for the record. The record type can be associated with a sales process. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.
Shipping and Handling	The total shipping and handling costs for the quote.
Ship To	The shipping address for the account that's associated with the quote.
Ship To Name	The name of the entity (such as a person or company) that the quote line items are shipped to.
Status	The status of the quote. The standard options are: <ul style="list-style-type: none"> • —None— • Draft

Field	Description
	<ul style="list-style-type: none"> Needs Review In Review Approved Rejected Presented Accepted Denied <p>Your admin determines which status is the default for new quotes and which statuses allow you to email a quote PDF.</p>
Subtotal	The total of the quote line items before discounts, taxes, and shipping are applied. (Read only.)
Syncing	Whether the quote syncs with its associated opportunity. (Read only.)
Tax	The total taxes for the quote.
Total Price	The total of the quote line items after discounts and before taxes and shipping. (Read only.)

Quote Line Item Fields

Field	Description
Created By	The user who created the line item, including creation date and time. (Read only.)
Date	The service date, effective date, or other date for the product.
Discount	The discount that you apply to the line item. You can enter a number with or without the percent symbol. You can use up to two decimal places.
Last Modified By	The user who most recently changed the line item, including the modify date and time. (Read only.)
Line Description	The description of the product in the line item.
Line Item Number	A system-generated number that identifies the line item. (Read only.)
List Price	The price of the product within the price book, including currency. (Read only.)
Product	The name of the line item product as listed in the price book. (Read only.)
Product Code	The internal code or product number that's used to identify the product.
Quantity	The number of units of this line item's product included in the quote. The value must be one or greater. If a quote is synced with an opportunity, this field is updated from the quote line item to the opportunity product. If you use forecasting for your opportunities, this field also appears in the Products list on the Opportunity Forecast Edit page, depending on which forecasting version you use .

Field	Description
Quote Name	The name of the quote that the line item is for.
Sales Price	The price that you want to use for the product. Initially, the sales price for a product on an opportunity or quote is the product's list price from the price book, but you can change it here. If a quote is synced with an opportunity, this field is updated from the quote line item to the opportunity product. If you use forecasting for your opportunities, this field also appears in the Products list on the Opportunity Forecast Edit page, depending on which forecasting version you use .
Schedule	Whether the line item uses schedules in the opportunity. Default schedules aren't carried over from the opportunity when opportunity products are copied to a quote.
Subtotal	The line item's sales price multiplied by the quantity.
Total Price	The line item's sales price multiplied by the quantity and minus the discount.

Troubleshooting Quote Syncing

Errors can occur when you try to sync quotes under certain conditions. Review common error messages, and learn how to resolve them. If you don't have the appropriate permissions, contact your Salesforce admin.

This quote can't be synced because it has inactive or archived products.

- If the product isn't active, edit the product and select the `Active` checkbox.
- If the product has been archived and the opportunity isn't closed, delete the product.

This quote can't be synced because it has an inactive or archived price book.

- If the price book isn't active, edit the price book and select the `Active` checkbox.
- If the price book has been archived and the opportunity isn't closed, delete the price book.

This quote can't be synced because it has inactive or archived list prices.

- If the list price isn't active, edit the list price and select the `Active` checkbox for the list price.
- If the list price has been archived and the opportunity isn't closed, delete the list price.

This quote can't be synced because it has an inactive currency.

Activate the currency from Setup by entering *Manage Currencies* in the `Quick Find` box, then selecting **Manage Currencies**.

This quote can't be synced because one or more of the schedules for the opportunity products have changed since the quote was created.

Create a different quote and sync it, or open the product, delete the schedule, and then re-create the schedule.

This quote can't be synced because another quote that's being synced for this opportunity is locked due to a workflow approval process. Opportunities can only sync with one quote at a time.

To unlock the other quote, finish the approval process or recall the request for approval.

The SyncedQuote field is read only within a trigger.

Determine whether your Salesforce org is using an Apex trigger that's attempting to modify the `SyncedQuote` field. The `SyncedQuote` field is read only and can't be modified with a trigger. An admin can modify the trigger.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

In Sales Cloud, also available in: **Professional**, **Enterprise**, and **Unlimited** Editions

Contracts

A contract is a written agreement between parties. Many companies use contracts to define the terms for doing business with other companies. Use Salesforce to establish and document the contracts that you have with your accounts and opportunities. Track the contract through your approval process. And use workflow alerts to remind yourself of contract renewals.

[Set Up Contracts](#)

Customize Salesforce to handle your internal contract management process.

[Manage Your Contracts](#)

Establish and document the contracts that you have with your accounts and opportunities. Track the contract through your approval process. And use workflow alerts to remind yourself of contract renewals.

[Things to Know About Contracts](#)

When you create a contract, consider the type of information that's needed to maximize the quality of your data.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

Set Up Contracts

Customize Salesforce to handle your internal contract management process.

To access the Contract Settings page, from Setup, enter *Contract Settings* in the Quick Find box, then select **Contract Settings**.

Enable Contract Expiration Notices

Send email notifications to account and contract owners when a contract expires.

1. Select **Send Contract Expiration Notice Emails to Account and Contract Owners**, and then save your changes.
2. To stop sending expiration notices, deselect this option, and then save your changes.

Enable Auto-Calculation of Contract End Dates

To automatically calculate contract end dates, select **Auto-calculate Contract End Date**, and then save your changes.

Note:

- If Salesforce automatically calculates a contract end date, it doesn't appear on the contract's edit page.
- If Auto-calculate Contract End Date is enabled, and Contract Start Date or Contract Term is blank, Contract End Date is blank.

Disable Auto-Calculation of Contract End Dates

If your contracts don't have end dates, or if you prefer to let your sales team enter them manually, disable auto-calculation of contract end dates.

1. Deselect **Auto-calculate Contract End Date**, and then save your changes.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Contracts are available in: **Performance** and **Developer** Editions

Contracts are available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To change contract settings:

- Customize Application

2. View your page layout and field-level security settings for Contract End Date, Contract Start Date, and Contract Term to verify that your sales team can read and edit them as needed.

Track History for All Statuses

The default is to track history for contracts with a status of In Approval Process or Activated.

To track history for contracts for all statuses, select **Track History for All Statuses**, and then save your changes.

Show a Contract on Opportunity or Quote Details

To show a contract on the opportunity or quote details, use field-level security and field accessibility.

1. From Setup, at the top of the page, select **Object Manager**.
2. In the object management settings for opportunities or quotes, click **Contract** in the fields area.
3. Click **Set Field-Level Security**.
4. Select **Visible** for each profile that you want to see contracts on opportunity or quote details, and then save your changes.
5. Click **View Field Accessibility**.
6. If any profile is marked hidden, click **Hidden**, and then select **Visible** under Page Layout.
7. Save your changes. The profiles are marked editable.

To show an Opportunities or Quotes related list on contracts, use page layouts.

Enable a Contracts Chatter Feed

Add contract fields to be monitored via Chatter.

1. From Setup, enter *Feed Tracking* in the Quick Find box, then select **Feed Tracking**.
2. From the list of objects, select Contract.
3. Select the **Enable Feed Tracking** checkbox and then the checkboxes for the fields that you want to track.
4. Save your changes.

SEE ALSO:

[Contracts](#)

[Set Up Orders](#)

[Find Object Management Settings](#)

Manage Your Contracts

Establish and document the contracts that you have with your accounts and opportunities. Track the contract through your approval process. And use workflow alerts to remind yourself of contract renewals.

[Activate Contracts](#)

Activate a contract to indicate that it's in effect. An activated contract is read-only.

[Contract History](#)

Curious about the changes made to a contract during its lifecycle? View the Contract History related list on a contract's detail page.

[Delete Contracts](#)

To keep your data up-to-date, delete contracts that are no longer valid.

Activate Contracts

Activate a contract to indicate that it's in effect. An activated contract is read-only.

Open a contract, and then click **Activate**.

SEE ALSO:

[Contracts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To activate contracts:

- [Activate Contracts](#)
- AND
- [Read and Edit on contracts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

Contract History

Curious about the changes made to a contract during its lifecycle? View the Contract History related list on a contract's detail page.

Here's how it works. When someone modifies a standard or custom field whose history is tracked on a contract, an entry is added to the Contract History related list. Entries show the date, time, nature of the change, and who made the change. (Changes to the contract's related lists aren't tracked here.)

The default is to track changes for contracts with a status of In Approval Process or Activated. To track changes for contracts with any status, ask your Salesforce admin to [Set Up Contracts](#).

To report on activated contracts whose fields are tracked, choose **Contract History** under Contracts and Orders in the Reports area.

If you're using Lightning Experience, switch to Salesforce Classic to see Contract History.

Delete Contracts

To keep your data up-to-date, delete contracts that are no longer valid.

You delete a contract on the contracts list view or a contract's detail page.

When you delete a contract:

- It's moved to the Recycle Bin (Salesforce Classic only).
- All related orders, notes, attachments, events, tasks, history, and approval requests are deleted. (Associated accounts aren't deleted.) If you undelete the contract (Salesforce Classic only), the related items are restored.

EDITIONS

Available in: Salesforce Classic

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To delete inactivated contracts:

- Delete on contracts
- AND
- Read on accounts

To delete activated contracts:

- Delete Activated Contracts

AND

Read on accounts

Things to Know About Contracts

When you create a contract, consider the type of information that's needed to maximize the quality of your data.

- The start date (required)
- How long the contract will be in effect: the term in months (required)
- The end date

Some admins configure Salesforce to calculate the contract end date based on the contract start date and contract term. If the contract end date is calculated, it doesn't appear on the contract's edit page.

If you use divisions (Salesforce Classic only), the division of a new contract is set to the division of the related account.

Contract Fields

Your page layout and field-level security settings determine which fields are visible and editable.

Contract Fields

Your page layout and field-level security settings determine which fields are visible and editable.

A contract has the following fields, listed in alphabetical order.

Field	Description
Account Name	Name of the account associated with the contract.
Activated By	Name of the person who activated the contract.
Activated Date	Activation date of the contract.
Billing City	City portion of billing address. Up to 40 characters are allowed.
Billing Country	Country portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing State/Province	State or province portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing Street	Street address used for billing. Up to 255 characters are allowed in this field.
Billing Zip/Postal Code	Zip or postal code portion of billing address. Up to 20 characters are allowed.
Company Signed By	User at your company who authorized the contract.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

EDITIONS

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Available in: **Performance** and **Developer** Editions

Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with the Sales Cloud

Field	Description
Company Signed Date	Date when the contract was authorized.
Contract Division	Division to which the contract belongs (Salesforce Classic only). This value is inherited from the related account. Available only in orgs that use divisions to segment data.
Contract End Date	Last day when the contract is in effect. Your admin can configure Salesforce to calculate the contract end date based on the contract start date and contract term. If this field is auto-calculated, it doesn't appear on the contract edit page.
Contract Name	Title for the contract that distinguishes it from other contracts.
Contract Number	Unique number assigned to the contract. Numbering for contracts starts at 100. (Read only.) Admins can modify the format and numbering for this auto-number field.
Contract Owner	User who owns the contract record.
Contract Start Date	First day when the contract is in effect.
Contract Term (months)	Number of months that the contract is in effect.
Created By	User who created the contract record.
Customer Signed By	Contact on the account that authorized the contract.
Customer Signed Date	Date when the contact signed the contract.
Customer Signed Title	Title of the contact who signed the contract.
Description	Statement describing the contract.
Last Modified By	User who most recently changed the contract record.
Owner Expiration Notice	Number of days before the contract end date when you want to send the notification, if the contract owner and account owner wants to be notified of an upcoming contract expiration.
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed.
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping State/Province	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed.
Shipping Zip/Postal Code	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed.

Field	Description
Special Terms	Any terms that you've agreed to and want to track in the contract.
Status	Stage that the contract has reached in the contract business process. Your admin can add values to this picklist within three system-defined contract status categories: Draft, In Approval Process, and Activated. You can use these status categories to track contracts within your business process using reports and views.
Custom Links	List of custom links for contracts set up by your admin.

SEE ALSO:

[Things to Know About Contracts](#)

Orders

Use orders to track your customers' requests for products and services.

An *order* is an agreement between a company and a customer to provision services or deliver products with a known quantity, price, and date. Your Salesforce admin determines whether you add orders to contracts or accounts.

For example, an Internet service provider probably requires customers to commit to a year of service. That company requires contracts as a reference for every order. But a company that sells clothing probably sells products in a single transaction. That company associates each order with an account.

[Set Up Orders](#)

Customize Salesforce to handle your internal order management process.

[Manage Your Orders](#)

Share orders, add products to orders, and reduce orders as needed.

[Things to Know About Orders](#)

Review considerations, guidelines, and limitations for using orders.

SEE ALSO:

[Reduction Orders](#)

[Sales Features: What's Different or Not Available in Lightning Experience](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view the Orders tab:

- Read on orders

To view orders:

- Read on orders

Set Up Orders

Customize Salesforce to handle your internal order management process.

Specify the following order settings from the Order Settings page in Setup.

[Enable Orders](#)

To let your sales team track and manage customer requests for products or services, enable orders.

[Enable Negative Quantities for Order Products](#)

To let your sales team add order products with quantities of less than zero, enable negative quantities.

[Enable Reduction Orders](#)

To let your sales team process returns or reductions on activated orders (Salesforce Classic only), enable reduction orders in Salesforce.

[Enable Zero Quantity Orders](#)

To let your sales team add order products with quantities of zero, enable zero quantities.

SEE ALSO:

[Orders](#)

Enable Orders

To let your sales team track and manage customer requests for products or services, enable orders.

1. From Setup, enter *Order Settings* in the Quick Find box, then select **Order Settings**.
2. Make sure that **Enable Orders** is selected.
3. Save your changes.
4. Select which page layouts have an Orders related list, and then save your changes.
5. Use profiles or permission sets to assign user and object permissions to the appropriate users.
6. Create field sets (Salesforce Classic only) on orders and order products to control what fields appear on Visualforce pages.

If you disable orders, your order-related data is hidden. To access that data, re-enable orders.

SEE ALSO:

[Permission Sets](#)

[Work in the Enhanced Profile User Interface Page](#)

[Set Up Orders](#)

[Enable Reduction Orders](#)

[Orders](#)

[About Field Sets](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To modify order settings:

- [Customize Application](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To modify order settings:

- [Customize Application](#)

Enable Negative Quantities for Order Products

To let your sales team add order products with quantities of less than zero, enable negative quantities.

1. From Setup, enter *Order Settings* in the *Quick Find* box, then select **Order Settings**.
2. Make sure that **Enable Orders** is selected.
3. Select **Enable Negative Quantity**.
4. Save your changes.

If Enable Negative Quantity is disabled, your sales team can't add order products with negative quantities or activate orders that have order products with negative quantities. But your sales team can still view and edit order products that have negative quantities.


SEE ALSO:

- [Set Up Orders](#)
- [Order Products](#)

Enable Reduction Orders

To let your sales team process returns or reductions on activated orders (Salesforce Classic only), enable reduction orders in Salesforce.

1. From Setup, enter *Order Settings* in the *Quick Find* box, then select **Order Settings**.
2. Make sure that **Enable Orders** is selected.
3. Select **Enable Reduction Orders**.
4. Save your changes.
5. Using a profile or permission set, assign the necessary permissions to the appropriate sales team members.
 - To create reduction orders, team members need the "Create Reduction Orders" user permission.
 - To add order products to reduction orders, team members need field-level access to these order product fields: *Start Date*, *End Date*, and *Original Order Product*.
6. Consider adding the Reduction Order Products related list to your page layouts for order products.

 **Note:** If Enable Reduction Orders is later disabled, the "Create Reduction Orders" permission is hidden from all profiles or permission sets, but no data is hidden. Your sales team can't create or activate reduction orders, but they can view and edit existing ones. If you disable reduction orders, disable the record types and page layouts specific to reduction orders. If you aren't using record types, remove fields specific to reduction orders from your page layouts. These include *Original Order* and *Reduction Order* on the *Order* object, *Original Order Product* and *Available Quantity* on the *Order Product* object, and any custom fields.

SEE ALSO:

- [Permission Sets](#)
- [Work in the Enhanced Profile User Interface Page](#)
- [Set Up Orders](#)
- [Reduction Orders](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To modify order settings:

- [Customize Application](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS


To modify order settings:

- [Customize Application](#)

Enable Zero Quantity Orders

To let your sales team add order products with quantities of zero, enable zero quantities.

1. From Setup, enter *Order Settings* in the *Quick Find* box, then select **Order Settings**.
2. Make sure that **Enable Orders** is selected.
3. Select **Enable Zero Quantity Orders**.
4. Save your changes.

 **Note:** If Enable Zero Quantity is disabled, your sales team can't add order products with zero quantities or activate orders that have order products with zero quantities. But your sales team can still view and edit order products that have zero quantities.

Manage Your Orders

Share orders, add products to orders, and reduce orders as needed.

Share Orders

Your Salesforce admin defines your company's default sharing model. You can change this model to extend sharing to more users than the default allows. You can't change the sharing model to make it more restrictive than the default.

Order History

Track changes to an order, such as when the status is modified, on its detail page by using the Order History related list.

Order Products

An *order product* is a product or service that's provided to a customer according to an associated order.

Add Products to an Order

Track what you're selling by adding products to your customers' order records.

Reduction Orders

Use reduction orders to track requests to reduce, return, deactivate, or disable a customer's products or services.

Reduce Orders

If your company accepts returns or reductions on activated orders, you can reduce the relevant orders to reflect those exchanges of goods and services.

Add Products to a Reduction Order

After creating a reduction order, indicate which products need to be reduced and the quantities to reduce those products.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To modify order settings:

- Customize Application

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Share Orders

Your Salesforce admin defines your company's default sharing model. You can change this model to extend sharing to more users than the default allows. You can't change the sharing model to make it more restrictive than the default.

1. To view and manage sharing details, click **Sharing** on the order detail page.

The Sharing Detail page lists the users, groups, roles, and territories that have sharing access to the order. The Sharing button isn't available when the organization-wide default for orders is controlled by the parent.

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



Note: You can share orders only with people who have "Read" permission on orders.

Order History

Track changes to an order, such as when the status is modified, on its detail page by using the Order History related list.

When someone modifies a standard or custom field, an entry is added to the Order History related list (available in Salesforce Classic only), regardless of the order's status. All entries include the date, the time, the nature of the change, and who made the change. Modifications to the related lists on the order aren't tracked in the order history.

SEE ALSO:

[Orders](#)

[Reduction Orders](#)

Order Products

An *order product* is a product or service that's provided to a customer according to an associated order.

All order products in an order are associated with a price book. The Order Products related list on an order indicates in parentheses which price book the order is associated with. For example, if the Government price book is associated with your order products, the related list is titled Order Products (Government).

A *reduction order product* is a product or service to be returned, reduced, deprovisioned, or disabled according to an associated reduction order. Each reduction order product is directly associated with an order product.

SEE ALSO:

[Add Products to a Reduction Order](#)

[Orders](#)

[Reduction Orders](#)

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

Add Products to an Order

Track what you're selling by adding products to your customers' order records.

Note:

- You can use only one price book per order.
- You can add order products to draft orders only.

- Open the order that you want to add products to.
- In the Order Products related list, click the button for adding products.
- If a price book isn't selected for this order, select the price book that you want to use, and then save your changes.
- Select the products to add to your order.
- Enter a quantity and unit price for each order product.
- Add line descriptions if needed.
- Save your changes.

SEE ALSO:

[Editing and Deletion Limitations for Orders and Reduction Orders](#)

[Considerations for Activation Limitations](#)

[Order Products](#)

[Orders](#)

Reduction Orders

Use reduction orders to track requests to reduce, return, deactivate, or disable a customer's products or services.

A *reduction order* is an agreement between a company and a customer to process product returns, deprovision services, or reduce services that have been provisioned. For example, if a customer has purchased 30 items through an order and then requests to cancel that order, you can create a reduction order to track the request.

You can create multiple reduction orders for a single order, but you can't create a single reduction order for multiple orders. For example, to reduce order products that were purchased through three activated orders, you create three reduction orders—one for each original order—even if all those orders are for the same account.

SEE ALSO:

[Considerations for Activation Limitations](#)

[Editing and Deletion Limitations for Orders and Reduction Orders](#)

[Order Fields](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add products to an order:

- Edit on orders

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduce Orders

If your company accepts returns or reductions on activated orders, you can reduce the relevant orders to reflect those exchanges of goods and services.

Note:

- If you're using Lightning Experience, you can't create reduction orders. Switch to Salesforce Classic.
- You can reduce activated orders only.
- You can apply a reduction order toward one order only. To reduce order products across multiple orders, create a reduction order for each original order.

1. Go to the detail page of the order that you're reducing.
2. Click **Reduce Order**.
3. Enter the details for the reduction order, and then save your changes.
4. Add products to indicate which order products on the original order need to be reduced.

SEE ALSO:

[Add Products to a Reduction Order](#)

[Considerations for Activation Limitations](#)

[Order Fields](#)

[Order Product Fields](#)

Add Products to a Reduction Order

After creating a reduction order, indicate which products need to be reduced and the quantities to reduce those products.

Note:

- If you're using Lightning Experience, you can't create reduction orders. Switch to Salesforce Classic.
- An order product is reducible only if its Available Quantity is greater than zero. You can partially reduce a product, but you can't reduce it to less than zero.
- You can reduce up to 200 order products in one reduction order.

1. Open the reduction order that you want to add products to, or [reduce an existing order](#) to create a reduction order.
2. In the Order Products related list, click **Select Products to Reduce**.
3. In the Quantity to Reduce column, enter the number of units to reduce each order product's quantity.
 - To fully reduce an order product, enter the same number in Quantity to Reduce as appears in Available Quantity.
 - If you don't want to reduce an item, leave the Quantity to Reduce blank.

For example, if the original order included 3,000 coffee sleeves, and your customer needs only 2,000, enter *1 000* in the Quantity to Reduce column.

EDITIONS

Available in: Salesforce Classic

Orders are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To reduce an order:

- Create Reduction Orders

EDITIONS

Available in: Salesforce Classic

Orders are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To add order products to a reduction order:

- Edit on orders

4. Save your changes.

SEE ALSO:[Reduction Orders](#)[Order Products](#)[Editing and Deletion Limitations for Order Products](#)

Things to Know About Orders

Review considerations, guidelines, and limitations for using orders.

[Guidelines for Creating Orders](#)

When you're creating orders, make sure that you follow key guidelines.

[Editing and Deletion Limitations for Orders and Reduction Orders](#)

Some fields aren't editable after an order is created. Others aren't editable after an order has been reduced.

[Considerations for Activation Limitations](#)

Protect the integrity of your order data with activation limitations for orders and reduction orders.

[Salesforce CPQ Reduction Orders Limitations](#)

When you work with reduction orders in Salesforce CPQ, some limitations apply. We recommend using Salesforce CPQ amendments instead.

[Editing and Deletion Limitations for Order Products](#)

Depending on whether the parent order has been activated or reduced, limitations for when you can edit or delete order products can apply.

[Order Fields](#)

Your page layout and field-level security settings determine which fields are visible and editable.

[Order Product Fields](#)

Your page layout and field-level security settings determine which fields are visible and editable.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Guidelines for Creating Orders

When you're creating orders, make sure that you follow key guidelines.

- When you create an order, the order's start date must fall between the associated contract's start and end dates.
- Associate each order with an account and optionally with a contract, depending on your Salesforce admin's settings.
- You can create an order from the Orders tab and then manually add the associated account and contract. But if you create an order directly on an account or contract via its Orders related list, no extra step is required. The order is associated with that record.
- To create an order with the same details as another order, you can clone it. (If you're using Lightning Experience, when you clone an order with products, the products aren't cloned. Clone the order, and then add products as needed to the new order.)
- If you clone an order with products, you can't change the new order's currency or price book.

SEE ALSO:

[Create and Update Records](#)

[Add Products to an Order](#)

[Orders](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create an order from the Orders tab:

- Create on orders

To create an order on a contract:


- Create on orders AND Read on contracts

To create an order on an account:

- Create on orders AND Read on accounts

Editing and Deletion Limitations for Orders and Reduction Orders

Some fields aren't editable after an order is created. Others aren't editable after an order has been reduced.

- In Salesforce Classic, you can't edit the status category of an order or reduction order from Draft to Activated or vice versa. The status field is updated based on other processes. For example, when you click **Activate**, the status category is changed from Draft to Activated. The status picklist values sometimes differ depending on your Salesforce admin's settings.
 - In Lightning Experience, Status picklist values aren't filtered based on an order's status, so all status values appear in the picklist.
 - After an order is created, you can change its `Account` field only when the following conditions are true.
 - The order is in Draft status.
 - If the order has an associated contract, that contract is associated with the new account.
 - After an order is created, you can change its `Contract` field only when the following conditions are true.
 - The order is in Draft status.
 - The account associated with the order is the same as the account associated with the new contract.
 - The currency associated with the order is the same as the currency associated with the new contract.
 - If the order has an associated price book, that price book is associated with the new contract.
 - After a price book is assigned to an order, you can't change or remove the price book assignment.
 - If an order has an associated reduction order, you can't edit the order's end date.
 - Before you delete an activated order or reduction order, deactivate it. And before you deactivate the order, deactivate and delete any associated reduction orders.
 - Only the order owners, account owners, contract owners, and Salesforce admins can delete related orders.
-  **Note:** When you delete a contract, all related orders, notes, attachments, events, tasks, history, and approval requests are deleted. Associated accounts aren't deleted with the contract. The deleted contract is moved to the Recycle Bin (Salesforce Classic only). If you undelete the contract, its related items are also restored.

SEE ALSO:

[Reduction Orders](#)

[Guidelines for Creating Orders](#)

[Orders](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To edit an order or reduction order:

- Edit on orders

To edit an activated order or reduction order:

- Edit Activated Orders

To delete an order or reduction order:

- Delete on orders

Considerations for Activation Limitations

Protect the integrity of your order data with activation limitations for orders and reduction orders.

- You can activate orders for active contracts but not for inactive contracts.
- You can activate orders only if they include order products.
- You can activate reduction orders for order products only if they result in positive quantities.
- After you activate an order or reduction order, you can modify order products. You can't add or remove them.
- Before you can deactivate an order that has reduction orders, you must deactivate and delete its reduction orders.

SEE ALSO:

[Orders](#)

[Reduction Orders](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To activate orders:

- Activate Orders

To deactivate orders and reduction orders:

- Edit Activated Orders

Salesforce CPQ Reduction Orders Limitations

When you work with reduction orders in Salesforce CPQ, some limitations apply. We recommend using Salesforce CPQ amendments instead.

Reduction orders in Salesforce CPQ can't be used to do the following.

- Include percent of total lines when you reduce a covered asset
- Include bundle components when you reduce the parent bundle
- Create price schedules
- Consider the price calculation status when you activate an order
- Create a contract, subscription, or asset

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Unlimited,** and **Developer** Editions

Reduction orders are available in: **Enterprise, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To edit an order or reduction order:

- Edit on orders

To edit an activated order or reduction order:

- Edit Activated Orders

To delete an order or reduction order:

- Delete on orders

Editing and Deletion Limitations for Order Products

Depending on whether the parent order has been activated or reduced, limitations for when you can edit or delete order products can apply.

- If an order or reduction order has been activated, you can't delete its order products. But you can still edit an order product's fields.
- After an order product has been reduced, you can no longer edit or delete the order product in that order.

SEE ALSO:

[Add Products to an Order](#)

[Add Products to a Reduction Order](#)

[Order Products](#)

[Reduction Orders](#)

Order Fields

Your page layout and field-level security settings determine which fields are visible and editable.

Orders and reduction orders have the following fields.

Field	Description
Account Name	Name of the account associated with the order. (Read-only for reduction orders.)
Account Number	Unique number automatically assigned to the account associated with the order. (Read-only for reduction orders.)
Activated By	Name of the user who activated the order. (Read-only.)
Activated Date	Date when the order was activated.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To edit an order product on a draft order or reduction order:

- Edit on order products

To delete an order product on a draft order or reduction order:

- Delete on order products

To edit order products on an activated order or reduction order:

- Edit Activated Orders

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduction orders are available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

Field	Description
Billing City	City portion of billing address. Up to 40 characters are allowed.
Billing Country	Country portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing State/Province	State or province portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Billing Street	Street address used for billing. Up to 255 characters are allowed.
Billing Zip/Postal Code	Zip or postal code portion of billing address. Up to 20 characters are allowed.
Bill To Contact	Contact to whom the order is billed.
Company Authorized By	User at your company who authorized the order.
Company Authorized Date	Date when the order was authorized.
Contract End Date	Last day when the contract is in effect. (Read-only.)
Contract Name	Title for the parent contract that distinguishes it from other contracts. (Read-only.)
Contract Number	Unique number automatically assigned to the contract. Numbering for contracts starts at 100. (Read-only for reduction orders.)
Created By	User who created the order record. (Read-only.)
Currency	Default currency for all currency amount fields in the order. (Read-only for reduction orders.)
Customer Authorized By	Contact on the order's account who authorized the order.
Customer Authorized Date	Date when the contact authorized the order.
Description	Description of the order.
Last Modified By	User who most recently changed the order record.
Opportunity	Opportunity that's associated with the order.
Order Amount	Total amount of the order.
Order End Date	Date when the order ends.
Order Name	Title for the order that distinguishes it from other orders.
Order Number	Unique number automatically assigned to the order. Numbering for orders starts at 100. (Read-only.)
Order Record Type	Record type assigned to this order.
Order Reference Number	Reference number assigned to this order.

Field	Description
Order Start Date	Date when the order becomes effective.
Order Type	Type of order. Entry is selected from a picklist of available values, which a Salesforce admin sets. Each picklist value can have up to 40 characters.
Original Order	For reduction orders only. Prepopulated with the ID of the parent order when you create a reduction order by clicking Reduce Order .
Owner	Owner of the order. Can be a user or queue. Order owners have full access to their orders regardless of their account access.
PO Date	Date when a purchase order was entered.
PO Number	Number of the purchase order.
Quote	Quote that's associated with the order.
Reduction Order	If selected, the order record represents a reduction order. Automatically selected when you create a reduction order by clicking Reduce Order . (Read-only.)
Shipping City	City portion of primary mailing or shipping address. Up to 40 characters are allowed.
Shipping Country	Country portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping State/Province	State or province portion of primary mailing or shipping address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.
Shipping Street	Primary mailing or shipping street address of account. Up to 255 characters are allowed.
Shipping Zip/Postal Code	Zip or postal code portion of primary mailing or shipping address. Up to 20 characters are allowed.
Ship To Contact	Contact to whom the order is shipped.
Status	<p>Indication of the stage that the order has reached in the order business process.</p> <p>You can add values to this picklist within two system-defined order status categories: Draft and Activated. You can use these status categories to track orders within your business process using</p>

Field	Description
	reports and views. Some user permissions apply specifically to draft statuses. Others apply specifically to activated statuses.

SEE ALSO:

[Orders](#)[Reduction Orders](#)[Order Product Fields](#)

Order Product Fields

Your page layout and field-level security settings determine which fields are visible and editable.

Order products and reduction order products have the following fields.

Field	Description
Available Quantity	Number of units available to be reduced. When a reduction order is activated, an order product's available quantity is updated to reflect the quantity of relevant reduction order products. Value must be greater than or equal to 0. (Read-only.)
Created By	User who created the order product record. (Read-only.)
End Date	End date for the order product.
Last Modified By	User who most recently changed the order record.
Line Description	Description for this order product record.
List Price	Default price set by the price book on the parent order. (Read-only.)
Order	Parent order for this order product.
Order Product Number	Automatically generated number that identifies the order product record. (Read-only.)
Original Order Product	Number that identifies the order product being reduced. Required if the order product is reducing another order product. (Read-only.)
Product	Name of the product used in this order product record. (Read-only.)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Orders are available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Reduction orders available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

Field	Description
Product Code	Internal code or product number used to identify the product. (Read-only.)
Quantity	Quantity of units of the product.
Quote Line Item	Quote line item that's associated with the order product. The quote line item's quote must match the quote that's associated with the order product's parent order.
Start Date	Start date for the order product.
Total Price	Quantity of the order product multiplied by the unit price.
Unit Price	Unit price for the order product.

SEE ALSO:

[Order Products](#)[Order Fields](#)

Manage Accounts and Contacts

Track the people and companies you do business with. Store information, collaborate on accounts, access the records you need.

Accounts

Use accounts to store information about customers or individuals you do business with. There are two types of accounts. Business accounts store information about companies. Person accounts store information about individual people.

Contacts

Use contacts to store information about the people you do business with. Contacts are usually associated with an account, but can also be associated with other records such as opportunities. Contacts are even more useful when you enable Contacts to Multiple Accounts, add hierarchy information, and customize sharing settings.


EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

Accounts

Use accounts to store information about customers or individuals you do business with. There are two types of accounts. Business accounts store information about companies. Person accounts store information about individual people.

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

Manage Accounts

Get the most out of accounts by merging duplicates, sharing accounts with the right people, seeing the history of an accounts, and more.

Set Up Accounts

Accounts are great, but when you add additional account features and settings such as hierarchies, logos, and automated fields, they're even better.

Person Accounts

Person accounts store information about individual people by combining certain account and contact fields into a single record.

Account Teams

An account team is a team of users who work together on an account. Use account teams to easily track collaboration on accounts. Account teams aren't the same as opportunity teams, although they have the same team member roles.

Things to Know About Accounts

Review additional considerations for contacts.

Manage Accounts

Get the most out of accounts by merging duplicates, sharing accounts with the right people, seeing the history of an accounts, and more.

Share Accounts

Your administrator defines your organization's sharing model and your organization's default account access levels for territories. However, you can extend sharing privileges for your own data on an account-by-account basis.

Merge Duplicate Accounts

Keep your records clean and free of duplicates so you can reach more customers and maintain better relationships with them.

Update Accounts with Third-Party Data

Your Salesforce admin can set up features for importing new accounts or comparing your accounts to records from Lightning Data or Data.com. Depending on the way your admin sets up these features, your accounts are updated when information changes, and you can also review and update accounts yourself.

View and Convert Leads on an Account

Accounts show leads matched to a business account, with the best matches first. Convert leads without leaving the account.

EDITIONS

Business accounts available in: both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

EDITIONS

Business accounts available in: both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

[Account History](#)

Use the Account History related list on an account detail page to track the changes to the account.

[Change the Territories of an Account](#)

If your team uses territory management, keep your territory information up to date by changing an account's assigned territory.

Share Accounts

Your administrator defines your organization's sharing model and your organization's default account access levels for territories. However, you can extend sharing privileges for your own data on an account-by-account basis.

1. Click **Sharing** on the account detail page.
2. Click **Add** to share the account with users, groups, roles, or territories.



Note: You can't restrict access beyond your organization's default access levels. When you share an account, Salesforce prompts you to share any related contacts, opportunities, and cases that you have access to. Users must have at least "Read" permission to access the shared records.

SEE ALSO:

[Territory Management Concepts](#)

[Account Teams](#)

Merge Duplicate Accounts

Keep your records clean and free of duplicates so you can reach more customers and maintain better relationships with them.

[Things to Know Before Merging Duplicate Accounts](#)

Keep these considerations in mind before merging duplicate account records.

[Things to Know About Merging Duplicate Accounts Associated with Relationship Groups](#)

Keep these considerations in mind when merging accounts that are members of relationship groups.

[Merge Duplicate Accounts in Lightning Experience](#)

Merge duplicate accounts using Lightning Experience.

[Merge Duplicate Accounts in Salesforce Classic](#)

Merge duplicate accounts using Salesforce Classic.

EDITIONS

Available in: Salesforce Classic

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

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

Things to Know Before Merging Duplicate Accounts

Keep these considerations in mind before merging duplicate account records.

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

General

Sharing Rules

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

Redundant Relationships

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

Related Items, Chatter Feeds, and Attachments

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

Hidden and Read-Only Fields

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

Account Hierarchy

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

Non-Master Accounts

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

Divisions

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

Relationship Groups

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

Team Members

Team Members from Non-Master Accounts

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

Permission to Merge on Teams

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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


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

Person Accounts

Portal Support

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

Person Accounts and Business Accounts in Salesforce Classic

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

Redundant Relationships

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

Communities

Permission

To merge accounts associated with communities, you must have the "Manage External Users" permission. You also need permissions to delete accounts and edit related records such as opportunities and contacts.

Including Community-Associated Contacts in Merged Record

To ensure that the merged account includes contacts associated with a community, select the account with community users as the master record.

Community Type

When you merge accounts that have contacts associated with a community, the contacts must belong to the same type of community.

Contacts Associated with Multiple Communities

When you merge accounts that have contacts associated with multiple communities of the same type, a contact's access to a specific community doesn't change. A community user's profile determines the community they can access.

Partner Accounts

When you merge a non-partner account with a partner account, the partner account must be selected as the master record.

When you merge a partner account with a non-partner account, the owner can't be changed.

Enterprise Territory Management

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

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

Territory Management (Salesforce Classic Only)

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

- If none of the original accounts have `Exclude from account assignment rules` selected, then account assignment rules run on the merged account to determine its territories. Also, any territories that were manually added to the non-master accounts are manually added to the new account.
- If at least one of the original accounts has `Exclude from account assignment rules` selected, then the following happens.
 - Account assignment rules don't run on the merged account.
 - The merged account inherits all the territories from the non-master accounts.
 - If assignment rules were used to assign territories to the non-master accounts, it appears as if assignment rules are also used to assign territories to the newly merged account, even if the rules don't apply to the merged account.
 - If a territory was manually assigned to one of the non-master accounts, the territory is manually assigned to the merged account.
 - If a territory was added to one account manually and to another account by rules, the territory is manually added to the merged account.

SEE ALSO:

[Merge Duplicate Accounts in Lightning Experience](#)

Things to Know About Merging Duplicate Accounts Associated with Relationship Groups

Keep these considerations in mind when merging accounts that are members of relationship groups.

One Account per Group

An account can't exist more than once in the same relationship group.

Which Record Gets Relationship Group Membership

The account you select as the master record retains its original relationship group memberships. For example, suppose that the master record "Joseph Blake" is a member of the "Blake Family" and "Blake Law Firm" relationship groups. "Joseph Blake" remains a member of those relationship groups.

The master record replaces the non-master records in all other relationship groups involved in the merge. For example, suppose that the non-master record "Joe Blake" is a member of "Blake Trust Beneficiaries." The master record is transferred to Joe Blake's membership in Blake Trust Beneficiaries.

If multiple non-master records belong to a relationship group that the master record doesn't belong to, the master record acquires membership as follows:

- In the relationship group of the non-master account with higher priority (primary versus secondary)
- In the relationship group whose member record was most recently modified in the group

For example, suppose that the non-master records "JR Blake" and "Joe Blake" both are members of "Acme LLP" and JR Blake is primary. The master record is transferred to JR Blake's membership in Acme LLP. Alternatively, suppose that JR Blake and Joe Blake aren't

EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

USER PERMISSIONS

To merge business accounts:

- Delete on accounts

To merge person accounts:

- Delete on accounts, Read on contacts

primary or secondary, but JR Blake's member record in the relationship group was modified more recently. The master record is transferred to JR Blake's membership in Acme LLP.

SEE ALSO:

[Merge Duplicate Accounts in Lightning Experience](#)

Merge Duplicate Accounts in Lightning Experience

Merge duplicate accounts using Lightning Experience.

1. Choose an account record. A message tells you if duplicates exist for that record. To see them, click **View Duplicates**.
2. Choose up to three account records to merge. Click **Next**.

Potential Duplicate Records

View Duplicates

To merge duplicates, choose up to 3 person accounts. Then click Next and choose the fields to keep.

✓ Person Accounts (2)

	ACCOUNT NAME	FIRST NAME	LAST NAME	PHONE	EMAIL	ACCOUNT OWNER ALIAS
<input checked="" type="checkbox"/>	Laura Baxter	Laura	Baxter	800-555-1213		rie
<input checked="" type="checkbox"/>	Laura Baxter	Laura	Baxter	800-555-1213		rie

These duplicates can't be merged with person accounts.

✓ Contacts (1)

	NAME	PHONE	EMAIL	ACCOUNT NAME	CONTACT OWNER ALIAS
	Laura Baxter	800-555-1213	lbaxter@globalmedia.com	Global Media	rie

[Next](#)

You can merge business accounts or person accounts. Business and person accounts can't be merged with each other.

3. Choose one account record as the master, and choose the field values that you want to keep. Click **Next**.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To view business or person accounts:

- Read on business or person accounts

To merge business or person accounts:

- Delete on business or person accounts

AND

Edit on related objects, such as opportunities and cases

AND

You must be a Salesforce admin, the account owner, or a user above the account owner in the role hierarchy

Potential Duplicate Records

Compare Person Accounts

When you merge, the master record is updated with the values you choose, and relationships to other items are shifted to the master record.

	Laura Baxter Select All	Laura Baxter Select All
MASTER RECORD	<input checked="" type="radio"/> Use as master	<input type="radio"/> Use as master
WEBSITE	<input checked="" type="radio"/> globalmedia.com	<input type="radio"/> globalmedia.net
TYPE	<input type="radio"/> Prospect	<input checked="" type="radio"/> Customer
CREATED DATE	8/2/2017 3:02 PM	8/2/2017 3:01 PM
LAST MODIFIED DATE	9/15/2017 4:48 PM	9/15/2017 4:47 PM

Showing fields with different values. [Show All Fields](#)

[Back](#) [Next](#)

4. Confirm your choices and merge.

Potential Duplicate Records

Confirm Merge

Are you sure you want to merge these records?

You're about to merge these person accounts. You can't undo merging.

[Back](#) [Merge Person Accounts](#)

SEE ALSO:

[Things to Know Before Merging Duplicate Accounts](#)

[Things to Know About Merging Duplicate Accounts Associated with Relationship Groups](#)

Merge Duplicate Accounts in Salesforce Classic

Merge duplicate accounts using Salesforce Classic.

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

Update Accounts with Third-Party Data

Your Salesforce admin can set up features for importing new accounts or comparing your accounts to records from Lightning Data or Data.com. Depending on the way your admin sets up these features, your accounts are updated when information changes, and you can also review and update accounts yourself.

SEE ALSO:

[Use Third-Party Data to Update and Add Records to Salesforce AppExchange: Lightning Data](#)

EDITIONS

Available in: Salesforce Classic

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

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

USER PERMISSIONS

To view business or person accounts:

- Read on business or person accounts

To merge business or person accounts:

- Delete on business or person accounts

AND

Edit on related objects, such as opportunities and cases

AND

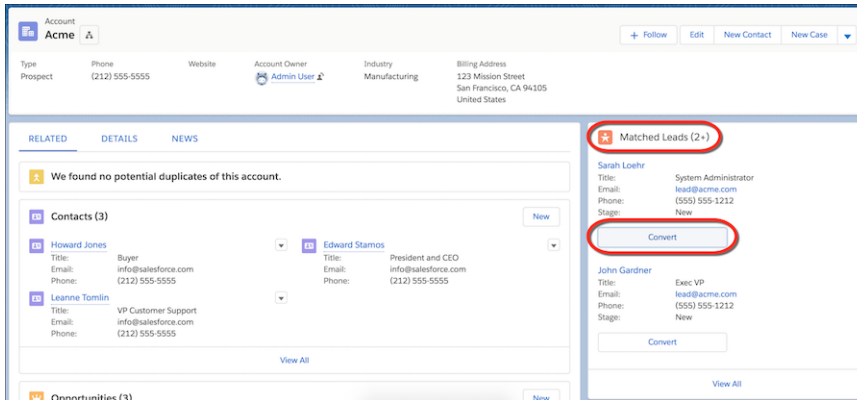
You must be a Salesforce admin, the account owner, or a user above the account owner in the role hierarchy

View and Convert Leads on an Account

Accounts show leads matched to a business account, with the best matches first. Convert leads without leaving the account.

The Matched Leads component is populated by a standard matching rule for leads on accounts.

 **Example:**



SEE ALSO:

[Standard Matching Rule for Leads on Accounts](#)

[Pardot Pricing](#)

Account History

Use the Account History related list on an account detail page to track the changes to the account.

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

SEE ALSO:

[Field History Tracking](#)

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions with **Pardot Pro** or **Pardot Ultimate** Edition

USER PERMISSIONS

To view leads:

- View on Leads

To edit or convert leads:

- Edit on Leads

EDITIONS

Available in: Salesforce Classic

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

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

USER PERMISSIONS

To view accounts:

- Read on accounts

Change the Territories of an Account

If your team uses territory management, keep your territory information up to date by changing an account's assigned territory.

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

SEE ALSO:

[Territory Management Concepts](#)

[Assign Accounts to Territories Manually](#)

Set Up Accounts

Accounts are great, but when you add additional account features and settings such as hierarchies, logos, and automated fields, they're even better.

[Display Account Hierarchies](#)

Give sales reps a bird's-eye view of the relationships between parent accounts and their subsidiaries.

[Enable Automated Account Fields](#)

Make it easier for sales reps to create business accounts. As reps enter information in the **Account Name** field, we show a list of possible matches. When reps select a company from the list, multiple fields are automatically filled. Automated Account Fields is enabled by default for most orgs, but you can turn it on or off as needed.

[Enable Account Logos](#)

Let your sales reps see US-based company logos, when available. Logos can replace existing logos that come from social profiles. With Automated Account Fields enabled, logos appear next to suggested accounts. Account Logos is enabled by default for most orgs, but you can turn it on or off as needed.

[Business Contact Sharing for Orgs That Use Person Accounts](#)

Orgs that use person accounts can modify the Organization-Wide Sharing Default for Contacts. This allows for flexibility in how you share business contacts, including the ability to define contact sharing rules and manually share business contacts.

Display Account Hierarchies

Give sales reps a bird's-eye view of the relationships between parent accounts and their subsidiaries.

EDITIONS

Available in: Salesforce Classic

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

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

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

USER PERMISSIONS

To change the territories of an account:

- Manage Territories
- OR

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

Set Up Account Hierarchy in Salesforce Classic

Provide a link to the account hierarchy on account records so sales reps can view relationships between parent accounts and their subsidiaries.

Set Up Account Hierarchy in Lightning Experience

Show the relationships between parent accounts and their subsidiaries to sales reps using Lightning Experience. You can customize hierarchy columns to show the information that's most useful to your sales teams.

Set Up Account Hierarchy in Salesforce Classic

Provide a link to the account hierarchy on account records so sales reps can view relationships between parent accounts and their subsidiaries.

Account hierarchies display accounts related via the Parent Account field. To maintain a complete account hierarchy, enter an account in the Parent Account field for every account except the one at the top of the hierarchy.

1. From Setup, in the Quick Find box, enter *Account Settings* and then click **Account Settings**.
2. Select **Show View Hierarchy link on account pages in Salesforce Classic**.

Whenever an account is related to another account via the Parent Account field, the account detail page includes a **View Hierarchy** link.

SEE ALSO:

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

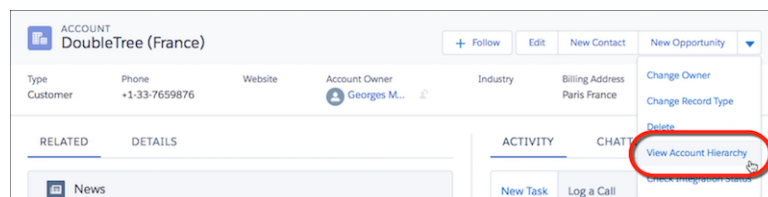
Set Up Account Hierarchy in Lightning Experience

Show the relationships between parent accounts and their subsidiaries to sales reps using Lightning Experience. You can customize hierarchy columns to show the information that's most useful to your sales teams.

Account hierarchies display accounts related via the Parent Account field.

1. Give your sales reps access to account hierarchies from account pages. In Setup, in the Salesforce Mobile and Lightning Experience Actions section of your account page layout, add the View Account Hierarchy action.

The Actions menu includes the View Account Hierarchy action unless you customized the account page layout before Spring '17.



Sales reps can expand or collapse parts of a hierarchy as they navigate it. They can view up to 2,000 accounts from each point where they enter a hierarchy. To view accounts in a different part of the hierarchy, a sales rep can enter the hierarchy from a different account.

EDITIONS

Available in: Salesforce Classic

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

EDITIONS

Available in: Lightning Experience

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

ACCOUNT > DOUBLETREE (FRANCE)
Account Hierarchy

ACCOUNT NAME	ANNUAL REVENUE	BIRTHDATE	FIRST NAME
<ul style="list-style-type: none"> ▼ Hilton Inc <ul style="list-style-type: none"> > Canopy > Conrad > Curio ▼ DoubleTree <ul style="list-style-type: none"> > DoubleTree (Canada) <ul style="list-style-type: none"> CURRENT DoubleTree (France) > DoubleTree (Germany) > DoubleTree (Italy) 	\$125,876,987		
> Canopy	\$1,456,543		
> Conrad	\$4,765,789		
> Curio	\$4,766,123		
▼ DoubleTree	\$5,672,341		
> DoubleTree (Canada)	\$987,654		
> CURRENT DoubleTree (France)	\$109,876		
> DoubleTree (Germany)	\$564,123		
> DoubleTree (Italy)	\$1,765,432		

Hovering over an account name shows more details.

> Conrad
 > Curio
 ▼ DoubleTree
 > DoubleTree (Canada)
 > **DoubleTree (France)**
 > DoubleTree (Germany)
 > DoubleTree (Italy)
 > DoubleTree (UK)

DoubleTree (France)

Type: Customer
 Phone: +1-33-7659876
 Website: Account Owner Georges Martin

Opportunities (0)
 Cases (0)

2. You can edit the hierarchy columns to show the information that’s most useful to your sales reps.

- a. From Setup, at the top of the page, select **Object Manager**.
- b. In Account, click **Hierarchy Columns** and then edit the columns.
 You can include up to 15 columns.

By default, account hierarchies display the same columns as the Recently Viewed Accounts standard list view. However, the list view columns don’t change when you customize the hierarchy columns.

All Setup

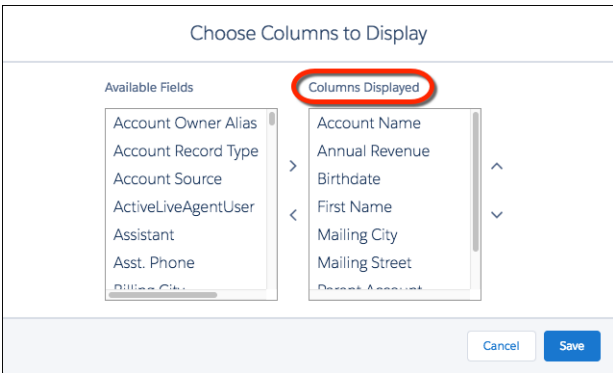
Q object manager


▼ Objects and Fields
Object Manager

Total Workflow Rules	0	500	0%
Approval Processes	0	500	0%
Active Lookup Filters	0	5	0%
Active Validation Rules	0	20	0%
VLOOKUP Functions	0	10	0%
Sharing Rules (Both Owner- and Criteria-based)	0	300	0%
Sharing Rules (Criteria-based Only)	0	50	0%

▼ Hierarchy Columns (1)

HIERARCHY VIEW NAME	COLUMNS DISPLAYED	
Account Hierarchy View	Account Name, Account Owner Alias, Account Record Type, Annual Revenue, Assistant, Asst. Phone, Billing City, Billing Country	Edit Delete



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

SEE ALSO:

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

Enable Automated Account Fields

Make it easier for sales reps to create business accounts. As reps enter information in the **Account Name** field, we show a list of possible matches. When reps select a company from the list, multiple fields are automatically filled. Automated Account Fields is enabled by default for most orgs, but you can turn it on or off as needed.

1. Make sure you've allowed the network access need for Automated Account Fields to work.
2. From Setup, enter *Account Settings* in the `Quick Find` box, then select **Account Settings**.
3. Select **Enable Automated Account Fields**.

SEE ALSO:

[Allow Network Access for News, Account Logos, and Automated Account Fields](#)

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To enable Automated Account Fields

- Customize Application

Enable Account Logos

Let your sales reps see US-based company logos, when available. Logos can replace existing logos that come from social profiles. With Automated Account Fields enabled, logos appear next to suggested accounts. Account Logos is enabled by default for most orgs, but you can turn it on or off as needed.

1. Make sure you've allowed the network access needed for Account Logos to work.
2. From Setup, enter *Account Settings* in the **Quick Find** box, then select **Account Settings**.
3. Select **Enable Account Logos**.

The gear icon next to logos lets you and your reps provide feedback on logos. If a logo violates trademark rights, you can remove it so that your reps no longer see it. You can't undo this action, so remove with care. If a logo is incorrect or the image quality is poor, admins and reps can flag a logo for review. When a rep flags a logo, it's removed from their own view. We take further actions to remove a logo after sales reps, both within or outside your org, flag it.

SEE ALSO:

[Allow Network Access for News, Account Logos, and Automated Account Fields](#)
[Enable Automated Account Fields](#)

Business Contact Sharing for Orgs That Use Person Accounts

Orgs that use person accounts can modify the Organization-Wide Sharing Default for Contacts. This allows for flexibility in how you share business contacts, including the ability to define contact sharing rules and manually share business contacts.

Manually sharing contacts applies only to the business accounts because person accounts don't have contacts. To share information about a person account, you must share the entire account.

To use this feature, edit your Sharing Settings.

1. From Setup, enter *Sharing Settings* in the Quick Find box.
2. For Account and Contract, select **Private**.
3. For Contact, select **Private**.

Organization-Wide Sharing Defaults Edit

Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing time depending on the amount of data in your organization. Setting an object to Private makes re access can be extended using sharing rules.

Object	Default Internal Access	Default External Access
Lead	Public Read/Write/Transfer	Public Read/Write/Transfer
Account and Contract	Private	Private
Order	Controlled by Parent	Controlled by Parent
Contact	Private	Private

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To enable Account Logos

- Customize Application

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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


To disable business contact sharing, change the Contact sharing setting to **Controlled by Parent**.

SEE ALSO:

[Person Accounts](#)

Person Accounts

Person accounts store information about individual people by combining certain account and contact fields into a single record.

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

[Considerations for Using Person Accounts](#)

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

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

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

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

A merge field incorporates values from a record. You can add merge fields to an email template, mail merge template, custom link, or formula. If your person account validation rules include merge fields, here are some things to keep in mind.

[Enable Person Accounts](#)

Person accounts store information about individual people by combining certain account and contact fields into one record.

[Business Contact Sharing for Orgs That Use Person Accounts](#)

Orgs that use person accounts can modify the Organization-Wide Sharing Default for Contacts. This allows for flexibility in how you share business contacts, including the ability to define contact sharing rules and manually share business contacts.

SEE ALSO:

[Merge Duplicate Accounts](#)

EDITIONS

Business accounts available in: both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

Considerations for Using Person Accounts

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

Salesforce Functionality	Person accounts Behavior
Account Merge	As with merging other kinds of records, person accounts can be merged only with other person accounts. You can't merge person accounts that are enabled as portal or community users. See Merge Duplicate Accounts on page 174.
Account Quick Create	On the accounts home page in Salesforce Classic, the fields in the Quick Create area are based on whether the default account record type set on your profile is a person account record type or a business account record type.
Accounts	<p>Person accounts can't be included in account hierarchies.</p> <p>Person accounts can't have direct relationships with other accounts or contacts. You can, however, use Contacts to Multiple Accounts to create indirect relationships between a person account and another person account, business account, or contact.</p>
Activities	<p>Person accounts can be associated with events or tasks using either the <code>Name</code> or <code>Related To</code> fields.</p> <p>As with contacts, person accounts can be invited to events.</p> <p>For users to request a meeting with a person account, the <code>Email</code> field must be added to the Person accounts page layout.</p>
Assets	A person account can be entered in the Account and Contact fields on an asset.
Campaigns	<p>As with contacts, person accounts can be added to campaigns and have a Campaign History related list.</p> <p>If you create a Contact related list based on a custom lookup relationship, the Add to Campaign row-level action doesn't show up for person accounts. Click View All to see the full related list and access the Add to Campaign mass action. This applies to Lightning Experience and the Salesforce app. (The Add to Campaign action isn't available in Salesforce Classic.)</p>
Cases	On cases, person accounts can be entered in the <code>Account Name</code> field, the <code>Contact Name</code> field, or both.
Chatter Feed Tracking	When you follow person accounts, you follow the account fields, but not the contact fields.

EDITIONS





Business accounts available in: both Salesforce Classic and Lightning Experience


Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

Salesforce Functionality	Person accounts Behavior
Communities and Portals	<p>As with contacts, person accounts can be enabled as users for customer communities and portals. Person accounts can't be enabled as users for partner communities and portals because partners represent companies, not individuals.</p> <p>For more information, see Person Account Community Limitations.</p>
Contacts	<p>Unlike business accounts, person accounts can't have direct relationships with contacts. You can, however, use Contacts to Multiple Accounts to create indirect relationships between a person account and a contact.</p>
Contacts to Multiple Accounts	<p>Contacts to Multiple Accounts on page 233 works with person accounts. That means a person account can be either a related contact on a business account or a related account on a contact. A person account can also be related to another person account as either a related contact or related account. Person accounts are always indirectly related to other accounts or contacts.</p>
Custom Objects	<p>Custom objects with relationships to either accounts or contacts can be added as related lists on person accounts.</p>
Data.com	<p>Person accounts aren't supported in Data.com Prospector, or Data.com Clean.</p>
Desktop Integration	<p>Person accounts are supported in the following Salesforce integration features.</p> <ul style="list-style-type: none"> • Lightning for Gmail • Lightning for Outlook • Lightning Sync • Salesforce Inbox • Salesforce for Outlook • Connect Offline
Duplicate Management	<p>Duplicate rules and the Potential Duplicates component support person accounts.</p>
Email	<p>As with contacts, you can send individual emails and group emails to person accounts. In Lightning Experience, you can send list emails to person accounts from Contact list views, not Account list views.</p>
Encryption	<p>When Person Accounts are turned on, encrypting some Account fields encrypts the equivalent Contact fields, and vice versa. See the Salesforce Shield Platform Encryption Implementation Guide.</p>
Field History	<p>Account and contact fields that appear on person account records can be tracked using the account field history settings. Person account field history is then captured in the Account History related list, the Account History report, and field audit trails.</p> <p>Field history for accounts tracks both business accounts and person accounts. For more information, see Track Field History for Standard Objects.</p>
Fields	<p>Most standard account and contact fields and all custom account and contact fields are available for person account page layouts.</p> <p>Some business account fields (such as <code>Parent Account</code>) and some contact fields (such as <code>Reports To</code>) are not supported for person accounts.</p> <p>See Account Fields.</p>

Salesforce Functionality	Person accounts Behavior
Geocodes	Geocodes for addresses can't be added to person accounts using data integration rules. Use the API or third-party services to add geocode data to person accounts.
Icons	<p>In Salesforce Classic, person accounts have a person icon (), while business accounts have a folder icon ().</p> <p>In Lightning Experience, person accounts have a person with building icon (), while business accounts have building icon ().</p>
Lead Conversion	Leads that don't have a value in the <code>Company</code> field are converted to person accounts. Leads that do have a value in the <code>Company</code> field are converted to business account.
Lightning Dialer	Users can make and receive calls for person accounts with Lightning Dialer.
Lightning Pages	<p>To display a custom Lightning page for person accounts, create a custom account record page, then assign it to the person account record type.</p> <p>When you create a Lightning page for accounts and assign it as the default for either an org or an app, that page becomes the org or app default for both business accounts and person accounts.</p>
List Views	<p>Person accounts appear in all but the following account and contact list views.</p> <ul style="list-style-type: none"> Recent Contacts on the Contacts home page in Salesforce Classic Recent Contacts on the Contacts home page in Lightning Experience Recently Viewed Contacts on the Contacts home page in Lightning Experience <p>Quickly see which records are person accounts by adding the <code>Is Person Account</code> field to the list of fields to display. To include or exclude person accounts from a list view, add the <code>Is Person Account</code> field to the filter criteria.</p>
Marketing Cloud	Person accounts are supported, but more configuration is required. More information
News	Account news is currently only available for business accounts.
Opportunity Contact Roles	As with contacts, you can associate person accounts to opportunities using the Contact Roles related list.
Packaging	Person accounts components and attributes can be included in managed and unmanaged packages.
Page Layouts	<p>Person accounts have their own page layouts that can include account and contact fields, account custom links, and account and contact related lists.</p> <p>Person accounts page layouts do not support the <code>Reports To</code> and <code>Parent Account</code> fields. See Person Account Fields.</p>
Pardot	Person accounts are supported in Pardot & Salesforce Engage, but additional configuration is required for the Pardot integration. More information
Partners	In Salesforce Classic, you can use the Partners related list to relate person accounts to each other. We recommend that you rename the Partners related list to reflect how your person accounts are connected.
Process Builder	Creating or editing a person account triggers processes created with the Process Builder.


Salesforce Functionality	Person accounts Behavior
Quick Actions	Custom actions can be defined for Person Accounts but with some exceptions. For details, see Action Limitations .
Record Types	Administrators can configure multiple record types for person accounts. From the UI, you can change an account's record type from a business account to a business account or from a person account to a person account. However, to change an account's record type from a business account to a person account, or vice versa, you must use the API.
Renamed Tabs and Standard Fields	To customize the names of tabs and fields displayed on person account records, administrators must customize the account and contact tabs and fields.
Sales Cloud Einstein	Emails and events can be automatically logged for person account using Einstein Activity Capture. Other Sales Cloud Einstein features, such as Account Insights and Automated Contacts, are currently only available with business accounts and contacts.
Salesforce to Salesforce	Person Account records can be shared using Salesforce to Salesforce. For more information, see Best Practices for Mapping Fields in Salesforce to Salesforce .
Search	In Lightning Experience and the Salesforce app person accounts appear in both account and contact search results. In Salesforce Classic, person accounts appear only in account search results. To help users differentiate person accounts from business accounts in search results, administrators can add the <code>Is Person Account</code> field to the appropriate search layout.
Self-Service Portal	As with contacts, person accounts can be enabled as users for your Self-Service portal.  Note: Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.
Sharing Settings	If you have enabled person accounts, the organization-wide default sharing must be set so that either Contact is Controlled by Parent or both Account and Contact are Private .
Social Accounts, Contacts, and Leads	As with contacts, you can link person accounts to social network profiles
Storage	Person accounts count against both account and contact storage because each person account consists of one account as well as one contact.
Workflow Rules	Creating or editing a person account triggers account workflow rules.

SEE ALSO:

[Person Accounts](#)[Person Accounts Implementation Guide](#)

Considerations for Using Merge Fields for Person Accounts

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

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

Important:

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

SEE ALSO:

[Person Accounts](#)

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

[Account Fields](#)

Considerations for Using Merge Fields in Validation Rules for Person Accounts

A merge field incorporates values from a record. You can add merge fields to an email template, mail merge template, custom link, or formula. If your person account validation rules include merge fields, here are some things to keep in mind.

- The list of available merge fields depends on the type of data that you're working with.
- To define a validation rule that applies only to person accounts, use the `IsPersonAccount` merge field. For example, `Account.City = "San Francisco"` verifies that a business or person account's city is San Francisco, while `IsPersonAccount (Account.City = "San Francisco")` verifies that a person account's city is San Francisco.
- Handle person account and business account names separately in account validation rules.
 - For business accounts, use the `Name` merge field.
 - For person accounts, use the `FirstName` and `LastName` merge fields.

EDITIONS

Business accounts available in: both Salesforce Classic and Lightning Experience

Business accounts available in: **All Editions**

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

EDITIONS

Business accounts available in: both Salesforce Classic and Lightning Experience

Business accounts available in: **All Editions**

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

- Birthdate, Email, and other fields that are only supported for person accounts are available as merge fields in account validation rules. When you use one of those merge fields, business account records are processed as if those fields have blank values.

SEE ALSO:


[Person Accounts](#)

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

[Account Fields](#)

Enable Person Accounts

Person accounts store information about individual people by combining certain account and contact fields into one record.

 **Important:** After Person Accounts is enabled, it can't be disabled. We recommend that you create a sandbox to preview how Person Accounts affect your Salesforce org.

1. Make sure you meet the following prerequisites.
 - The account object has at least one record type.
 - User profiles that have read permission on accounts have read permission on contacts.
 - The organization-wide default sharing is set so that either Contact is **Controlled by Parent** or both Account and Contact are **Private**.
2. From Setup, enter *Account Settings* in the Quick Find box, and then select **Allow Customer Support to enable Person Accounts**.
We'll verify your org meets the prerequisites, then send you an email with additional information. If you don't see a message verifying you meet the prerequisites, go back to step 1.
3. Contact Salesforce Customer Support by logging a case to enable Person Accounts.
Refer to the email we sent about what to include in the case.
4. After Person Accounts is enabled, a person account record type is created. You can create additional record types for person account if needed.
5. Assign the person account record type to user profiles.

SEE ALSO:

[Person Accounts](#)

[Person Accounts Implementation Guide](#)

[Assign Record Types](#)

EDITIONS

Business accounts available in: both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable person accounts:

- Customize Application

Business Contact Sharing for Orgs That Use Person Accounts

Orgs that use person accounts can modify the Organization-Wide Sharing Default for Contacts. This allows for flexibility in how you share business contacts, including the ability to define contact sharing rules and manually share business contacts.

Manually sharing contacts applies only to the business accounts because person accounts don't have contacts. To share information about a person account, you must share the entire account.

To use this feature, edit your Sharing Settings.

1. From Setup, enter *Sharing Settings* in the Quick Find box.
2. For Account and Contract, select **Private**.
3. For Contact, select **Private**.

Organization-Wide Sharing Defaults Edit

Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing time depending on the amount of data in your organization. Setting an object to Private makes re access can be extended using sharing rules.

Save Cancel

Object	Default Internal Access	Default External Access
Lead	Public Read/Write/Transfer	Public Read/Write/Transfer
Account and Contract	Private	Private
Order	Controlled by Parent	Controlled by Parent
Contact	Private	Private

To disable business contact sharing, change the Contact sharing setting to **Controlled by Parent**.

SEE ALSO:

[Person Accounts](#)

Account Teams

An account team is a team of users who work together on an account. Use account teams to easily track collaboration on accounts. Account teams aren't the same as opportunity teams, although they have the same team member roles.

[Set Up and Manage Account Teams](#)

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

[Add Account Team Members](#)

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

[Considerations for Removing Account Team Members](#)

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

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

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

[Account Team Fields](#)

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

Set Up and Manage Account Teams

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

[Enable Account Teams](#)

Use Account Teams to make it easy for your sales reps to collaborate on accounts.

[Customize Account Team Roles](#)

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

[Considerations for Disabling Account Teams](#)

Before you disable account teams, review these key considerations.

Enable Account Teams

Use Account Teams to make it easy for your sales reps to collaborate on accounts.

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

SEE ALSO:

[Set Up and Manage Account Teams](#)

[Account Teams](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable account teams:

- Customize Application

To set up team roles:

- Customize Application

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable account teams:

- Customize Application

To set up team roles:

- Customize Application

Customize Account Team Roles

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

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

1. From Setup, enter *Team Roles* in the *Quick Find* box, then select **Team Roles** under Account Teams.
2. Edit the picklist values for team roles as needed.
3. Save your changes.
4. To update a changed picklist value in all your files, enter *Replace Team Roles* in the *Quick Find* box, then select **Replace Team Role**.

SEE ALSO:

[Set Up and Manage Account Teams](#)
[Account Teams](#)

Considerations for Disabling Account Teams

Before you disable account teams, review these key considerations.

- Disabling account teams irreversibly removes existing teams from all accounts and delete users' default account teams, and removes the Account Team related list from all page layouts.
- You cannot disable account teams for your organization if team members are referenced in Apex. For example, if Apex code references the `Team Member` field (represented as `AccountTeamMember` in the code), account teams cannot be disabled.

SEE ALSO:

[Set Up and Manage Account Teams](#)
[Account Teams](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up team roles:

- [Customize Application](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To disable account teams:

- [Customize Application](#)


Add Account Team Members

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

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

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

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

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

3. Save the information.

SEE ALSO:

[Account Team Fields](#)

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To add team members to an account:

- Read on users

AND

Edit on accounts

To view accounts as team members:

- Read on accounts

Considerations for Removing Account Team Members

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

- For each account you own, you can remove any team member from the account team.
- Unless specified, removing a member of your account team does not remove that person from your opportunity teams.
- If a team member is on your default account team and you remove him or her from a specific account, those changes only affect that account. The setup of your default account team does not change. To remove users from your default account team, see [Guidelines for Setting Up Default Account Teams](#) on page 199.
- If a user on an account team has Read/Write access (**Account Access**, **Contact Access**, **Opportunity Access**, and **Case Access**) and is deactivated, the access will default to Read Only if the user is reactivated.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view accounts:

- Read on accounts

To remove team members:

- Read on users

AND

Edit on accounts

AND

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

Guidelines for Setting Up Default Account Teams

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

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

SEE ALSO:

[Account Teams](#)

[Personalize Your Salesforce Experience](#)

Account Team Fields

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

Field	Description
<code>Account Access</code>	The level of access that a team member has to the account. The access level can be read/write or read only, but it can't be less than your Salesforce org's default account sharing access.
<code>Case Access</code>	The level of access that a team member has to the cases associated with the account.
<code>Contact Access</code>	The level of access that a team member has to the contact. The access level can be read/write or read only, but it can't be less than your Salesforce org's default contact sharing access.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To set up default account teams:

- Read on opportunities

To add default account teams to accounts:

- Read on accounts

AND

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Field	Description
	<code>Contact Access</code> is not available when the organization-wide default for contacts is set to Controlled by Parent.
<code>Opportunity Access</code>	The level of access that a team member has to the opportunities associated with the account.
<code>Team Member</code>	The user who's listed as part of the team.
<code>Team Role</code>	The role that the team member plays for the account, such as Account Manager.

SEE ALSO:

[Add Account Team Members](#)

Things to Know About Accounts

Review additional considerations for contacts.

[Guidelines for Creating Accounts](#)

Keep these guidelines in mind when you create accounts.

[Guidelines for Deleting Accounts](#)

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

[Considerations for Using Account Hierarchy](#)

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

[Account Fields](#)

Accounts have business account fields and person account fields.

Guidelines for Creating Accounts

Keep these guidelines in mind when you create accounts.

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

SEE ALSO:

[Create and Update Records](#)

[Who Has Access to Account Records?](#)

[Account Fields](#)

EDITIONS

Business accounts available in: both Salesforce Classic and Lightning Experience


Business accounts available in: **All Editions**

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

Guidelines for Deleting Accounts

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

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

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

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

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

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

- Relationship group members in certain cases.
- Portal roles and groups.
- Scorecard associations.

You can't delete an account if:

- You don't have the Delete permission on accounts.
- You aren't the account's owner, above the account's owner in the organization role hierarchy; or an administrator.

You can't delete a partner account if:

- It has any child records, associated cases, activated contracts, or related opportunities that other users own.
- It has associated contacts that are enabled as Customer or Partner users.
- It is associated with a channel program membership.

If you want to delete an account that has closed/won opportunities you own, you have to delete the closed/won opportunities along with the account or keep the account. If you want to delete an account that is associated with a channel program membership, you have to delete the membership before deleting the account.

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

SEE ALSO:

[Delete Records](#)

[Merge Duplicate Accounts](#)

EDITIONS

Business accounts available in: both Salesforce Classic and Lightning Experience

Business accounts available in: **All** Editions

Person accounts available in: Both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view accounts:

- Read on accounts

To delete accounts:

- Delete on accounts

Considerations for Using Account Hierarchy

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

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

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

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

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

Considerations for Using Account Hierarchy in Lightning Experience

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

Accounts with Multiple Locations

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

Accounts in Divisions

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

Display of Accounts

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

Person Accounts Not Supported

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

SEE ALSO:

[Set Up Account Hierarchy in Lightning Experience](#)

Considerations for Using Account Hierarchy in Salesforce Classic

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

- An account hierarchy displays up to 500 child accounts in Salesforce Classic. The hierarchy doesn't display details of accounts you don't have permission to view.
- For companies with multiple office locations, you can also use the Account Site field to distinguish among the locations.
- If divisions are enabled, accounts that are related via the Parent Account field don't have to be in the same division.
- Person accounts aren't supported for the Parent Account field or the View Account Hierarchy action.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To view accounts:

- Read on accounts

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view accounts:

- Read on accounts

- To list an account as a subsidiary, edit the subsidiary account and type the name of an existing account in the Parent Account field. Alternatively, you can click the lookup icon to search for (or optionally, create) a parent account.

SEE ALSO:

[Set Up Account Hierarchy in Salesforce Classic](#)

Account Fields

Accounts have business account fields and person account fields.

Business Account Fields

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

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

Field	Description	Allows Value from Data.com or D&B
Account Currency	The default currency for all currency amount fields in the account. Amounts display in the account currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.	
Account Division	Division to which the account belongs. Records related to the account, such as contacts and opportunities, automatically inherit the account's division. Available only in organizations that use divisions to segment their data.	
Account Name	Name of company. Up to 255 characters are allowed in this field.	✔ (D&B)
Account Name (Local)	The name of the account translated into the local language.	
Account Number	Tracking or reference number for account. Up to 40	


EDITIONS


Available in: Salesforce Classic and Lightning Experience


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

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

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

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

Field	Description	Allows Value from Data.com or D&B
Billing State/Province	State or province portion of billing address. Entry is selected from a picklist of standard values or entered as text. If the field is a text field, up to 80 characters are allowed.	✔ (D&B)
Billing Street	Street address used for billing. Up to 255 characters are allowed in this field.	✔ (D&B)
Billing Zip/Postal Code	Zip or postal code portion of billing address. Up to 20 characters are allowed.	✔ (D&B)
Clean Status	<p>The record's clean status, as compared with Data.com. Values are <code>Not Compared</code>, <code>In Sync</code>, <code>Reviewed</code>, <code>Different</code>, <code>Not Found</code>, and <code>Inactive</code>. This field is available if you use Data.com Prospector or Data.com Clean.</p> <p> Note: If you clean your account records with Data.com Prospector or Data.com Clean, Data.com converts non-USD currencies to USD every month, which may cause the values in the <code>Annual Revenue</code> field to change. For organizations that use non-USD currencies, we ignore the <code>Annual Revenue</code> field when determining a record's clean status (so the <code>Clean Status</code> field's value does not change).</p>	✔ (Data.com)
Created By	User who created the account, including creation date and time. (Read only)	
Data.com Key	The company's ID in Data.com. When Salesforce records are compared with Data.com records (via manual cleaning or automated clean jobs), if Data.com finds a match, the two records are linked by this field's numeric value.	✔ (Data.com)
D&B Company	A link to the corresponding D&B Company record, which displays Dun & Bradstreet (D&B) fields for the account. Use the lookup if you need to associate a different D&B Company record with the account. This field is only available to organizations that use Data.com Prospector or Data.com Clean.	✔ (D&B)

Field	Description	Allows Value from Data.com or D&B
Description	Description of account. Up to 32 KB of data are allowed in this field. Only the first 255 characters display in reports.	✔ (D&B)
D-U-N-S Number	<p>The Data Universal Numbering System (D-U-N-S) number is a unique, nine-digit number assigned to every business location in the D&B database that has a unique, separate, and distinct operation. D-U-N-S numbers are used by industries and organizations around the world as a global standard for business identification and tracking. This field is available if you use Data.com Prospector or Data.com Clean.</p> <p> Note: To see the entire D-U-N-S number, either</p> <ul style="list-style-type: none"> • Add the account to Salesforce if you haven't yet, or • Clean the account with Data.com if it already exists in Salesforce <p>Until you add or clean the record, its first five digits will be masked with asterisks (*).</p>	✔ (D&B)
Employees	Number of people employed by the account.	✔ (D&B)
Evaluate this account against territory rules on save	When checked, causes account assignment rules to run when the account is edited and saved. When customizing the page layout for accounts, an administrator can control whether this checkbox displays and whether it is checked by default.	
Exclude from territory assignment rules	When checked, shields the account from being evaluated when account assignment rules are run, preventing it from being automatically assigned to territories. Also, if the account is already assigned to territories as a result of assignment rules, checking this box removes the account from those territories. This checkbox only affects rule-based account assignments and has no effect on manual account assignments.	

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

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

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

Person Account Fields

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


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


Field	Description	Is Contact Field
Account Currency	The default currency for all currency amount fields in the account. Amounts display in the account currency and are also converted to the user's personal currency. Available only for organizations that use multiple currencies.	

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

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

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

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

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

Field	Description	Is Contact Field
	Name Suffixes for Person Names.	
Territories	The territories to which the account has been assigned.	
Title	The contact's position within the organization. Maximum 80 characters.	✓
Type	Type of account, for example, Customer, Competitor, or Partner. Entry is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.	
Website	URL of account's website, for example, www.acme.com. Up to 255 characters are allowed in this field; only the first 50 are displayed.	

SEE ALSO:

[Accounts](#)

Contacts

Use contacts to store information about the people you do business with. Contacts are usually associated with an account, but can also be associated with other records such as opportunities. Contacts are even more useful when you enable Contacts to Multiple Accounts, add hierarchy information, and customize sharing settings.

[Manage Contacts](#)

Understand the basics of contact records, including creating and deleting, merging duplicates, and sharing contacts with others.

[Set Up Contacts](#)

Contacts are great, but when you add basic contact features such as sharing rules and hierarchies they're even better.

[Contacts to Multiple Accounts](#)

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

[Contact Roles](#)

Contact roles specify the part that each contact plays in an account, case, contract, or opportunity. When you use contact roles, your sales team always knows who to contact and when.

[Things to Know About Contacts](#)

Review additional considerations for contacts.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

Manage Contacts

Understand the basics of contact records, including creating and deleting, merging duplicates, and sharing contacts with others.

[Considerations for Creating Contacts](#)

Before you create contacts, consider a few key points.

[Guidelines for Viewing and Managing Contacts](#)

When viewing and managing your contacts, consider a few key points.

[Considerations for Deleting Contacts](#)

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

[Merge Duplicate Contacts](#)

Keep your records clean and free of duplicates so you can reach more customers and maintain better relationships with them.

[Update Contacts with Third-Party Data](#)

Your Salesforce admin can set up features for comparing your contacts to records from Lightning Data or Data.com. Depending on the way your admin sets up these features, your contacts are updated when information changes, and you can also review and update contacts manually.

[Share Contacts](#)

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

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

Considerations for Creating Contacts

Before you create contacts, consider a few key points.

- You can create a contact from several places in Salesforce.
 - Create a contact on an account's detail page.
 - [Import a contact](#) from a mobile device using the Salesforce app.
 - Create a contact from the Contacts area. You should always associate an account to the new contact. If you don't, the contact is private. Private contacts are accessible only to their owner and system administrators, which makes them hard to find and easy to forget.
- To create a contact that's automatically associated with an account, create the contact from the account's detail page.
- To track a contact's relationship with more than one account, use the Related Accounts related list to add additional account-contact relationships. By tracking all related accounts on a single contact record, you avoid creating duplicate contacts. Just make sure your admin has set up Contacts to Multiple Accounts.
- If your Salesforce org uses record types, you're sometimes prompted to choose a `Record Type` when creating a contact. Different record types can have different fields and picklist values.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

- If your Salesforce org uses divisions, the division of a new contact is automatically set to the division of the related account.

SEE ALSO:

[Contacts](#)

[Create and Update Records](#)

[Contact Fields](#)

Guidelines for Viewing and Managing Contacts

When viewing and managing your contacts, consider a few key points.

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

If you're using Salesforce Classic:

- To define your own custom view, click **Create New View**.
- To edit or delete a view that you created, select it from the **View** drop-down list, and then click **Edit**.
- To make person accounts easy to find, create a custom list view, adding the **Is Person Account** icon as a column.
- If you're using Salesforce Classic, to [add contacts to a campaign](#), select the checkbox next to one or more contacts, and then click **Add to Campaign**. To select all displayed records, select the checkbox in the column header.
- Modifications to the related lists for a contact aren't tracked in the contact history.

SEE ALSO:

[Contacts](#)

[Create and Update Records](#)

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

[Contact Fields](#)

Considerations for Deleting Contacts

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

- You can delete a contact if you're an administrator, the contact owner, or a user above the contact owner in the organization role hierarchy, *and* if you have the "Delete" permission on the Contact object. If you meet these requirements, you'll see **Delete** as an option on the contact's detail page and on its row on the contact list page in.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**

USER PERMISSIONS

To view contacts:

- Read on contacts

To create contacts:

- Create on contacts

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**

- If you delete a contact, these associated records are also deleted. You don't need the "Delete" permission on the associated records.
 - Assets (without cases)
 - Attachments
 - Campaign history
 - Events
 - Notes
 - Tasks

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

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

SEE ALSO:

[Delete Records](#)

[Contact Fields](#)

Merge Duplicate Contacts

Keep your records clean and free of duplicates so you can reach more customers and maintain better relationships with them.

[Merge Duplicate Contacts in Lightning Experience](#)

Merge duplicate contacts using Lightning Experience.

[Merge Duplicate Contacts in Salesforce Classic](#)

Merge duplicate contacts using Salesforce Classic.

[Considerations for Merging Duplicate Contacts](#)

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

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

Keep these considerations in mind before merging contacts associated with portal users.

Merge Duplicate Contacts in Lightning Experience

Merge duplicate contacts using Lightning Experience.

1. Choose a contact record. A message tells you if duplicates exist for that record. To see them, click **View Duplicates**.
2. Choose up to three contact records to merge. Click **Next**.

Potential Duplicate Records

View Duplicates

To merge duplicates, choose up to 3 contacts. Then click Next and choose the fields to keep.

✓ Contacts (2)

NAME	PHONE	EMAIL	ACCOUNT NAME	CONTACT OWNER ALIAS
<input checked="" type="checkbox"/> Janet Smith	5551212	info@acme.com	Acme	ymartin
<input checked="" type="checkbox"/> Janet Smith	(415) 555-1212	info@acme.com	Acme	ymartin

These duplicates can't be merged with contacts.

✓ Leads (1)

NAME	TITLE	COMPANY	PHONE	EMAIL	LEAD STATUS	OWNER ALIAS
Janet Smith	VP	Acme	5551212	info@acmeenterprises.com	New	ymartin

[Next](#)

3. Choose one contact record as the master, and choose the field values that you want to keep. Click **Next**.

Potential Duplicate Records

Compare Contacts

When you merge, the master record is updated with the values you choose, and relationships to other items are shifted to the master record.

	Janet Smith Select All	Janet Smith Select All
MASTER RECORD	<input type="radio"/> Use as master	<input checked="" type="radio"/> Use as master
PHONE	<input type="radio"/> 5553333	<input checked="" type="radio"/> (415) 555-1212
ACCOUNT NAME	<input type="radio"/> Acme	<input checked="" type="radio"/> Acme
EMAIL	<input checked="" type="radio"/> info@globalmedia.com	<input type="radio"/> info@acme.com
CREATED DATE	7/13/2017 11:38 AM	3/1/2017 2:43 PM
LAST MODIFIED DATE	9/15/2017 6:57 PM	9/15/2017 5:13 PM

Showing fields with different values. [Show All Fields](#)

[Back](#) [Next](#)

 **Note:** In Lightning Experience, portal user status isn't shown during merging.

4. Confirm your choices and merge.

EDITIONS

Available in: Lightning Experience

Available in: **All Editions**

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

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

USER PERMISSIONS

To merge contacts:

- Delete on contacts

To merge Customer Portal enabled contacts:

- Delete on contacts

AND

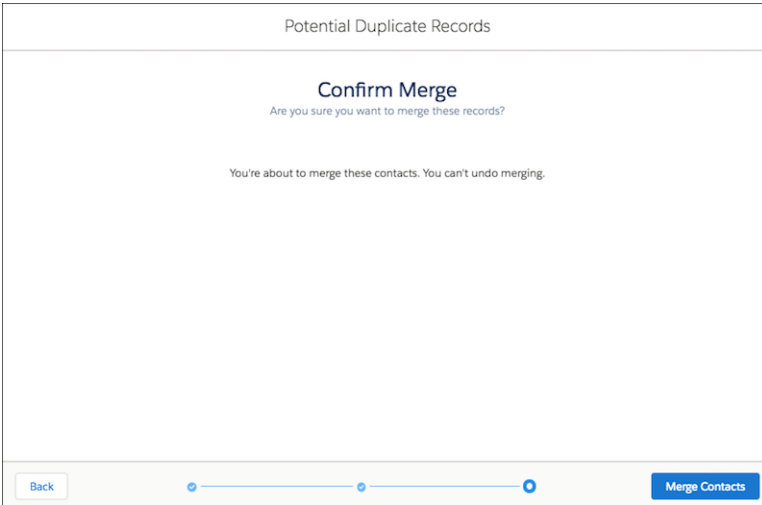
Edit Self-Service Users

To merge Partner Portal enabled contacts:

- Delete on contacts

AND

Manage Partners



SEE ALSO:

- [Considerations for Merging Duplicate Contacts](#)
- [Considerations for Merging Contacts Associated with Portal Users](#)
- [Contact Fields](#)

Merge Duplicate Contacts in Salesforce Classic

Merge duplicate contacts using Salesforce Classic.

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

See it in action: [▶ How to Merge Contacts in Salesforce Classic](#) (English only)

SEE ALSO:

- [Considerations for Merging Duplicate Contacts](#)
- [Considerations for Merging Contacts Associated with Portal Users](#)

Considerations for Merging Duplicate Contacts

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

Primary Account

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

Redundant Relationships

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

Contact Roles

When contacts are merged, contact roles on non-master contacts lose their status as the primary contact.

EDITIONS

Available in: Salesforce Classic

Available in: **All Editions**

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

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

USER PERMISSIONS

To merge contacts:

- Delete on contacts

To merge Customer Portal enabled contacts:

- Delete on contacts

AND

Edit Self-Service Users

To merge partner portal enabled contacts:

- Delete on contacts

AND

Manage Partners

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**

Portal Users

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

Campaigns

When duplicate contacts that are members of different campaigns are merged, Salesforce retains the Member Status Updated date for each campaign the merged contact is a member of.

Related Items, Chatter Feeds, and Attachments

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

Hidden and Read-Only Fields

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

Non-Master Contacts

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

SEE ALSO:

[Merge Duplicate Contacts](#)

Considerations for Merging Contacts Associated with Portal Users

Keep these considerations in mind before merging contacts associated with portal users.

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

SEE ALSO:

[Merge Duplicate Contacts](#)

EDITIONS

Available in: Salesforce Classic

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

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

Update Contacts with Third-Party Data

Your Salesforce admin can set up features for comparing your contacts to records from Lightning Data or Data.com. Depending on the way your admin sets up these features, your contacts are updated when information changes, and you can also review and update contacts manually.

SEE ALSO:

[Use Third-Party Data to Update and Add Records to Salesforce](#)

[AppExchange: Lightning Data](#)

Share Contacts

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

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

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

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

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

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

3. Save your changes.

SEE ALSO:

[Considerations for Sharing and Accessing Contacts](#)

Considerations for Sharing and Accessing Contacts

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

- Contact sharing isn't available for organizations that have territory management.
- You can't restrict access to contacts beyond your organization's default access levels.
- You need at least read access to the contacts and leads that you invite to an event. You need at least "Add Events" on a resource to invite it to an event.
- A contact that isn't linked to an account is always private, regardless of your organization's sharing model. Only the owner of the contact and administrators can view it. Sharing rules and workflow rules don't apply to private contacts. If your organization uses divisions, private contacts always belong to the global division.
- If a recipient doesn't have access to the account, you can't share the contact unless you also have permission to share the account.

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

- If your organization-wide default for contacts is set to Controlled by Parent, the `Contact Access` options aren't available when you share related records such as accounts. Instead, all access to contacts is determined by the user's access to the contact's account.
- If your organization-wide default for contacts is Controlled by Parent and your organization-wide default for accounts is Private, you can't view contacts for accounts that you don't own, even if you have the View All permission on the account object. However, if you own a contact on an account, you can view other contacts on the same account. (Access to a parent account gives you access to the associated child records.)

SEE ALSO:

[Share Contacts](#)

Import Contacts from Mobile Device Contact Lists into Salesforce

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

1. In the Salesforce app, navigate to where you create contacts.
2. Tap **Import from Device** to open the device's contact list.
3. Select a contact.
4. To associate the contact with an account in Salesforce, go to the contact record in Salesforce and add an account.

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

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



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

SEE ALSO:

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**

Considerations for Importing Contacts from a Mobile Device

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

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

SEE ALSO:

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

Set Up Contacts

Contacts are great, but when you add basic contact features such as sharing rules and hierarchies they're even better.

[Create Contact Sharing Rules](#)

Make automatic exceptions to your contact organization-wide sharing settings for defined sets of users.

[Enable Self-Service for Contacts and Person Accounts](#)

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

[Display Contact Hierarchies](#)

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

[Allow Users to Create Private Contacts](#)

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

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**

Create Contact Sharing Rules

Make automatic exceptions to your contact organization-wide sharing settings for defined sets of users.

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

1. If you plan to include public groups in your sharing rule, confirm that the appropriate groups have been created.
2. From Setup, enter *Sharing Settings* in the **Quick Find** box, then select **Sharing Settings**.
3. In the Contact Sharing Rules related list, click **New**.
4. Enter the **Label Name** and **Rule Name**. The Label is the sharing rule label as it appears on the user interface. The Rule Name is a unique name used by the API and managed packages.
5. Enter the **Description**. This field describes the sharing rule. It is optional and can contain up to 1000 characters.
6. Select a rule type.
7. Depending on the rule type you selected, do the following:
 - **Based on record owner**—In the **owned by members of** line, specify the users whose records will be shared: select a category from the first drop-down list and a set of users from the second drop-down list (or lookup field, if your organization has over 200 queues, groups, roles, or territories).
 - **Based on criteria**—Specify the Field, Operator, and Value criteria that records must match to be included in the sharing rule. The fields available depend on the object selected, and the value is always a literal number or string. Click **Add Filter Logic...** to change the default AND relationship between each filter.

 **Note:** To use a field that's not supported by criteria-based sharing rules, you can create a workflow rule or Apex trigger to copy the value of the field into a text or numeric field, and use that field as the criterion.
8. In the **Share with** line, specify the users who get access to the data: select a category from the first drop-down list and a set of users from the second drop-down list or lookup field.
9. Select the sharing access setting for users.

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

10. Click **Save**.

SEE ALSO:

- [Sharing Rules](#)
- [Sharing Rule Considerations](#)
- [Sharing Rule Categories](#)

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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


USER PERMISSIONS

To create sharing rules:

- [Manage Sharing](#)

Enable Self-Service for Contacts and Person Accounts

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

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

1. From the contact or person account detail page, click **Enable Self-Service**.
2. Verify the general information and locale settings, and enter any missing information. The customer's Self-Service `Username` defaults to the customer's `Email`.
3. To enable the customer as a Self-Service super user, select the `Super User` checkbox. Super users can view case information, add comments, and upload attachments for all cases that anyone in their company submits.
4. Select `Generate new password and notify user immediately` to email a Self-Service username and password to the customer.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable Self-Service users:

- Edit Self-Service Users

Enable the Customer Portal for Contacts and Person Accounts

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

1. From a contact or person account detail page, click **Manage External User**, and then select **Enable Customer User**.
2. Verify the general information and locale settings, and enter any missing information. The customer's `Username` defaults to the customer's `Email`.
3. Select a portal user license. The user license that you choose determines the permission sets, user profile, and role hierarchy options that you can select for the customer user. See [Customer Portal User Licenses](#).
4. Select `Generate new password and notify user immediately` to email a customer portal username and password to the customer.

If your Salesforce org uses multiple customer portals, customer users can access all customer portals that are assigned to their profiles with a single username and password. See [Creating Multiple Customer Portals](#).
5. Click **Save**.
6. To troubleshoot or confirm the portal configuration, on the contact detail page, click **Manage External User**, and then choose **Log in to Portal as User**. A new browser window opens and logs you in to the portal as the partner user.

You can deactivate customer users as needed.

SEE ALSO:


[Considerations for Changing Accounts on Contacts That Are Enabled for Portals](#)

Considerations for Enabling and Managing the Customer Portal for Contacts

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

Enabling the Customer Portal for Contacts

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

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable customer users or to log in as a portal user:


- Edit on the account that's associated with the customer user

AND

Edit Self-Service Users

OR

Manage External Users

-  **Important:** When creating customer users, the account that the new contact is associated with must have an account owner that is assigned a role.

EDITIONS

Available in: Salesforce Classic

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

- Any data that's created or owned by a Self-Service user can be visible to a partner user or customer user who's associated with the same contact.
- The user's `Nickname` defaults to the user's email alias unless you specify otherwise. For example, if the user's `Email` is "jsmith@company.com," the user's `Nickname` defaults to "jsmith" when you click **Save**.
- The first time you enable a contact for the customer portal on an account, the contact is assigned to the customer user role, which includes the name of the contact's account. You can update the contact's portal role later. (This behavior doesn't apply to high-volume customer users because they don't have roles and aren't included in the role hierarchy.)

Managing the Customer Portal for Contacts

- Edit an enabled contact's access to your customer portal. Click **Manage External User**, and then choose **View Customer User**.
- [Merge contacts that are enabled to use a customer portal.](#)
- [Change the account on the contact.](#)
- Make sure that you keep your contacts' access to your customer portal up-to-date by deactivating and disabling access as needed.
- You can delete contacts only if they're disabled from the portal. Inactive portal users can't be deleted.

Display Contact Hierarchies

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

[Set Up Contact Hierarchy in Lightning Experience](#)

Show the contacts on an account within a hierarchy for sales reps using Lightning Experience. To show the information that's most useful to your sales teams, customize the hierarchy columns.

[Display Contacts in an Org Chart in Salesforce Classic](#)

Show the contacts on an account within an org chart in Salesforce Classic.

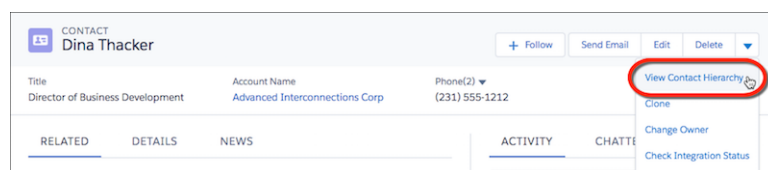
Set Up Contact Hierarchy in Lightning Experience

Show the contacts on an account within a hierarchy for sales reps using Lightning Experience. To show the information that's most useful to your sales teams, customize the hierarchy columns.

Hierarchies show who reports to whom according to the Reports To field. If the Reports To field is empty, the associated hierarchy or org chart shows only one person, regardless of how many contacts are assigned to the account.

1. Give your sales reps access to contact hierarchies from contact pages. In Setup, in the Salesforce Mobile and Lightning Experience Actions section of your contact page layout, add the **View Contact Hierarchy** action.

The Actions menu includes the View Contact Hierarchy action unless you customized the contact page layout before Summer '17.



EDITIONS

Available in: Lightning Experience

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

Sales reps can expand or collapse parts of a hierarchy as they navigate it. They can view up to 2,000 contacts from each point where they enter a hierarchy. To view contacts in a different part of the hierarchy, a sales rep can enter the hierarchy from a different contact.

CONTACT > DINA THACKER		
Contact Hierarchy		
NAME	TITLE	PHONE
▼ Kathy Fitzpatrick	President	(231) 555-1212
Brenda McClure	Chief Financial Officer	(231) 555-1212
▼ Mark Metz	Chief Executive Officer	(231) 555-0100
Dina Thacker CURRENT	Director of Business Development	(692) 555-1212
> Sean Murphy	Director of Marketing	(231) 555-0100
> Steve McDonald	Director of Information Technology	(231) 555-1212

Hovering over a contact's name shows more details.

CONTACT > DINA THACKER

Contact Hierarchy

NAME	TITLE	ACCOUNT NAME
▼ Kathy Fitzpatrick	President	Advanced Interconnections...
Brenda McClure	Chief Financial Officer	
▼ Mark Metz	Chief Executive Officer	
Dina Thacker	Director of Business Development	Advanced Interconnections...
> Sean Murphy	Director of Marketing	
> Steve McDonald	Director of Information Technology	

Dina Thacker

Phone: (231) 555-1212 | Email: dina.thacker@advanced-int...

Cases (0)

Opportunities (1)

Advanced Productions Corp* - 80K
 Stage: Prospecting
 Amount: \$80,000.00
 Close Date: 12/16/2016

[View All](#)

2. You can edit the hierarchy columns to show the information that's most useful to your sales reps.

- a. From Setup, at the top of the page, select **Object Manager**.
- b. In Contact, click **Hierarchy Columns** and then edit the columns.

You can include up to 15 columns.

By default, contact hierarchies display the same columns as the Recently Viewed Contacts standard list view. However, the list view columns don't change when you customize the hierarchy columns.

SETUP > OBJECT MANAGER
Contact

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Triggers
Validation Rules
Hierarchy Columns

Hierarchy Columns

HIERARCHY VIEW NAME	COLUMNS DISPLAYED
Contact Hierarchy View	Name, Title, Phone

Edit
Delete

Choose Columns to Display

Available Fields

- Created Date
- Data.com Key
- Department
- Email**
- Email Bounced Date
- Email Bounced Reason
- external id

Columns Displayed

- Name
- Title
- Phone

Cancel Save

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

SEE ALSO:

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

Display Contacts in an Org Chart in Salesforce Classic

Show the contacts on an account within an org chart in Salesforce Classic.

Enter a contact in the Reports To field for every contact on an account except the one at the top of the org chart. If a contact's Reports To field is empty, the org chart shows only a single person, regardless of how many contacts are assigned to the account.

1. On the contact's details page, in the Reports To field, enter the name of the contact's manager. Save your change.
2. To view the contact within an org chart, on the contact's details page, click **View Org Chart**.

Allow Users to Create Private Contacts

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

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

1. From the object management settings for contacts, go to Page Layouts.
2. Select the layout you want to edit.
3. Find the `Account Name` field on the layout and hover over it. Then, click the wrench icon to show the field properties.
4. Deselect the `Required` checkbox.
5. Confirm your changes.

Contacts to Multiple Accounts

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

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

Contacts to Multiple Accounts works with person accounts. That means a person account can be either a related contact on a business account or a related account on a contact. A person account can also be related to another person account as either a related contact or related account. When you relate a person account to an account or contact, the relationship is always indirect. That's

EDITIONS

Available in: Salesforce Classic

Available in: **All Editions**

USER PERMISSIONS

To view org chart:

- Read on contacts

To change org chart:

- Edit on contacts

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**

USER PERMISSIONS

To customize page layouts:

- Customize Application

To view page layouts:

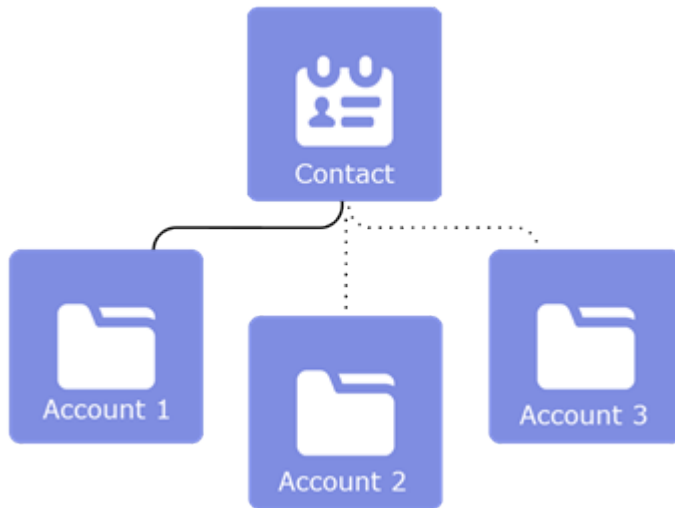
- View Setup and Configuration

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

because person accounts don't have primary accounts, so person accounts can't be directly related to business accounts. And person accounts can't be primary accounts for contacts, so person accounts can't be directly related to contacts.



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

SEE ALSO:

[Set Up Contacts to Multiple Accounts](#)

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

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

Comparing Contacts to Multiple Accounts to Other Options

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

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

EDITIONS

Contacts to Multiple Accounts is available in: both Salesforce Classic and Lightning Experience

Contacts to Multiple Accounts is available in: **Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

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

SEE ALSO:

- [Set Up Contacts to Multiple Accounts](#)
- [Considerations for Using Contact Roles](#)
- [Create a Many-to-Many Relationship](#)

Set Up Contacts to Multiple Accounts


Let your sales reps easily track the relationships between the customers and businesses they work with. Contacts to Multiple Accounts is quick to set up and allows reps to relate a single contact record to multiple accounts.

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


▶ [Watch a Demo](#) (English only)

1. If you're already using Account Contact Roles or a custom-built solution with a junction object, [review how those solutions compare with Contacts to Multiple Accounts](#).
2. From Setup, enter *Account Settings* in the Quick Find box, then select **Account Settings**.
3. Select **Allow users to relate a contact to multiple accounts**.
4. If you want to use custom fields to capture unique information about relationships—for example, the best time to call a contact—now's a good time to set that up. From the object management settings for Account Contact Relationship:
 - In Lightning Experience, go to **Fields & Relationships**.
 - In Salesforce Classic, go to **Fields**.
5. Make sure that you have the most relevant fields on your Account Contact Relationship page layout. From the object management settings for Account Contact Relationship, go to **Page Layouts**.
6. Add the Related Contacts related list to the account page layouts your reps use.

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

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

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

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

8. If you use person accounts, from Salesforce Classic, add the Related Accounts and Related Contacts related lists to the person account page layouts your reps use.
9. Decide whether you want to prevent activities from automatically rolling up to a contact's primary account. If so, from Setup, go to the Activities Settings page and deselect **Roll up activities to a contact's primary account**.
10. If you want to look at the relationships between contacts and accounts, create custom report types.

SEE ALSO:

[Find Object Management Settings](#)

[Considerations for Disabling Roll Up of Activities to a Contact's Primary Account](#)

[Create Custom Report Types for Account Contact Relationships](#)

[Validation Rules for Account Contact Relationships](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable Contact to Multiple Accounts:

- Customize Application

To view page layouts:

- View Setup and Configuration

To edit page layouts:

- Customize Application

Create Custom Report Types for Account Contact Relationships

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

1. Make sure you're familiar with custom report types and the general steps for creating and maintaining them.
2. Create custom report types with the appropriate object relationships, and configure them as necessary.

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

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

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To create or update custom report types:

- Manage Custom Report Types

To delete custom report types:

- Modify All Data

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

SEE ALSO:

[Contacts to Multiple Accounts](#)

[Set Up Contacts to Multiple Accounts](#)

Validation Rules for Account Contact Relationships

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

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

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

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

```
ISNULL(Roles)
```

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

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

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

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

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

SEE ALSO:

[Contacts to Multiple Accounts](#)

[Set Up Contacts to Multiple Accounts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience


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

Create and Edit Relationships Between Contacts and Accounts

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

 [Watch a Demo](#) (English only)

- From an account record, use the Related Contacts related list to create or manage relationships between accounts and contacts or person accounts.
 - Create a relationship by clicking **Add Relationship**.
 - Edit an existing relationship by clicking **View Rel** (in Salesforce Classic) or **View Relationship** (in Lightning Experience). Then click **Edit Relationship**.
 - Remove an existing relationship by clicking **Remove Relationship**. The relationship is deleted and can't be restored from the recycle bin.
- Fill in the account-contact relationship information.

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

- Save your changes.

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

SEE ALSO:

- [Contacts to Multiple Accounts](#)
- [Considerations for Relating a Contact to Multiple Accounts](#)
- [Account Contact Relationship Fields](#)

Considerations for Relating a Contact to Multiple Accounts

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

General

- The account that's in the `Account Name` field on a contact record is the contact's *primary* account. The relationship between the contact and its primary account is a *direct* relationship. All other accounts that are related to the contact are *indirect* relationships.
- To remove a direct relationship between a contact and an account, change the contact's primary account or delete the contact.
- Most features continue to reference a contact's primary account. For example, Duplicate Management uses the primary account when comparing records. Therefore, indirect account-contact relationships can't be included in the matching criteria used to find duplicate records.
- Indirect contacts aren't available in reports run from an Account & Contact standard report type.
- You can import account-contact relationships with the Data Loader, but not the Data Import Wizard.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

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

- Read on accounts and Edit on contacts

To view relationships between account and contacts

- Read on accounts and contacts

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

- Community users with the Customer Community user license can't see indirect account-contact relationships.
- In Lightning Experience and the Salesforce app, the **Add to Campaign** row-level action isn't available from the Related Contacts related list on account records. Click **View All** to see the full related list and access the Add to Campaign mass action.

Account Contact Relationships

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

Merging

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

Microsoft Integration

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

Admin Settings

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

Account Contact Relationship Object

- The following custom field types aren't supported.
 - Lookup relationship
 - Master-detail relationship
 - Roll-up summary
 - Text area (long)
 - Text area (rich)
- The following features and customizations aren't supported.
 - Field history
 - Field sets
 - Approvals
 - Record types
 - Field label renaming
- Custom actions are supported, but with limitations.
 - Custom actions must be specific to the Account Contact Relationship object. Global actions aren't supported.
 - You can create actions that update records or invoke Lightning components or Visualforce pages. However, you can't create actions that create records.
 - You can't create actions that send emails or log calls because the Account Contact Relationship object can't have activities associated to it.
 - You can't override the default actions on the Account Contact Relationship object.
 - Only custom actions that are created on the Contact object can use the Account Contact Relationship object as a target object.
 - Chatter standard actions aren't supported because the Account Contact Relationship object doesn't have a Chatter feed.
- Custom buttons are supported, but a custom button on a list view can't have a Visualforce page as the content source.

SEE ALSO:

[Contacts to Multiple Accounts](#)

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

Account Contact Relationship Fields

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

Field	Description
Account	The name of the company the contact is related to.
Active	Indicates whether the contact is actively involved with the company.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

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

SEE ALSO:

[Contacts to Multiple Accounts](#)

Contact Roles

Contact roles specify the part that each contact plays in an account, case, contract, or opportunity. When you use contact roles, your sales team always knows who to contact and when.

[Set Up Contact Roles](#)

When you use contact roles, your sales team always knows who to contact and when. Set up contact roles for each available object you want to use them with. You can define which roles to use and how they appear to your sales reps.

[Add and Manage Contact Roles](#)

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

[Considerations for Using Contact Roles](#)

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

[Contact Role Fields](#)

Contact Roles define the role that a contact or person account plays in an account, case, contract, or opportunity. A contact role has the following fields.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**

Set Up Contact Roles

When you use contact roles, your sales team always knows who to contact and when. Set up contact roles for each available object you want to use them with. You can define which roles to use and how they appear to your sales reps.

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

Before setting up contact roles for accounts, consider using [Contacts to Multiple Accounts](#) instead.

1. From Setup, enter *Contact Roles* in the **Quick Find** box, then select the contact roles you want to set up.
2. Modify the picklist values as needed. You can even create new values and add color to the values whenever they appear in charts.
3. Save your changes.
4. Add the Contact Roles related list to the appropriate page layout.
For example, if you're creating contact roles for opportunities, add the Contact Roles related list to the opportunity page layouts that your sales reps use.

SEE ALSO:

[Considerations for Using Contact Roles](#)

[Add and Manage Contact Roles](#)

Add and Manage Contact Roles

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

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

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

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

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

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

Add and Manage Contact Roles in Lightning Experience

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

 **Important:** In Lightning Experience, contact roles are available for opportunities and contracts. Although they work more or less the same for each available object, they work independently. Therefore, you need to set them up and use them separately for each object.

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

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

SEE ALSO:

[Considerations for Using Contact Roles](#)

[Contact Role Fields](#)

[Set Up Contact Roles](#)

EDITIONS

Available in: **Lightning Experience**

Available in: **All Editions**

USER PERMISSIONS

To add or edit contact roles:

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

AND

Read on contacts

To view contact roles:

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

Add and Manage Contact Roles in Salesforce Classic

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

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

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

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

SEE ALSO:

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

Considerations for Using Contact Roles

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

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

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

EDITIONS

Available in: **Salesforce Classic**

Available in: **All Editions**

USER PERMISSIONS

To add or edit contact roles:

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

AND

Read on contacts

To view contact roles:

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

EDITIONS

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

Available in: **All Editions**

- When you create an opportunity from a contact detail page, that contact becomes the primary contact on the opportunity. However, a contact role isn't automatically assigned.
- On case contact roles, the `Primary` option isn't available. The primary contact on a case is always the contact listed under `Contact Name` in the Case Detail section.

SEE ALSO:

[Add and Manage Contact Roles](#)

Contact Role Fields

Contact Roles define the role that a contact or person account plays in an account, case, contract, or opportunity. A contact role has the following fields.

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**

SEE ALSO:

[Contact Roles](#)

Things to Know About Contacts

Review additional considerations for contacts.

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

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

[Considerations for Changing Accounts on Contacts That Are Enabled for Portals](#)

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

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

Keep these considerations in mind when you create contact hierarchies.

[Contact Fields](#)

Your page layout and field-level security settings determine which contact fields are visible and editable.

Considerations for Changing the Account for Contacts

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

- 📌 **Note:** If the contact has a parent account, and the organization-wide default is Controlled by Parent, "Edit" access on the account is required to edit the contact.
- If any of the following are true, you can change the account that's associated with a contact.
 - You have access to the contact, and you're the owner of the target account or the manager of the owner in the role hierarchy.
 - You're the owner of the contact, or you have access to the contact, and you have access to the target account.
 - You're an admin.

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

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

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

SEE ALSO:

[Contacts](#)

[Share Contacts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**

Considerations for Changing Accounts on Contacts That Are Enabled for Portals

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

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

EDITIONS

Available in: Salesforce Classic

Available in: **All Editions**

Considerations for Contacts and Person Accounts in the Customer Portal

- Delegated administrators can't assign the High Volume Customer Portal license to contacts.

- When you create a customer user from the API, the Chatter Answers User permission isn't selected for that user.
- When person account users try to self-register for a customer portal, they receive an email notification that instructs them to contact the portal admin.
- You can't merge person accounts that are enabled to use portal or community users.
- You can't delete a person account that's enabled to use a customer portal.
- You can transfer contacts that are enabled for a partner portal only to accounts that are also enabled for a partner portal.

Considerations for Contacts and Person Accounts that are Enabled for Self-Service

- On the Self-Service portal, contacts that are [Self-Service users](#) on page 228 can view cases only if they're associated with their current account.
- Self-Service users can't view opportunities.
- You can't delete an active Self-Service user. You can only deactivate the user's access to the Self-Service portal.
- You can't delete a contact or person account that's associated with an active Self-Service user. Instead, deactivate the user's access to the Self-Service portal, and then delete the contact or person account.

SEE ALSO:

[Enable the Customer Portal for Contacts and Person Accounts](#)

[Enable the Customer Portal for Contacts and Person Accounts](#)

[Enable Self-Service for Contacts and Person Accounts](#)

[Delegate External User Administration](#)

[Create and Manage Partner Portals](#)

Considerations for Using Contact Hierarchy in Lightning Experience

Keep these considerations in mind when you create contact hierarchies.

Display of Contacts

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

Person Accounts Not Supported

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

SEE ALSO:

[Set Up Contact Hierarchy in Lightning Experience](#)

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To view contacts:

- Read on contacts

Contact Fields

Your page layout and field-level security settings determine which contact fields are visible and editable.

Field	Description
Account Name	The account that the contact is linked to. Enter the account name, select the account from a list, or create an account. Private contacts don't have an account.
Allow Customer Portal Self-Registration	If you allow access to a customer portal, when selected, allows contacts to self-register for it.
Assistant	The contact's assistant. Maximum 40 characters.
Asst. Phone	The assistant's phone number. Maximum 40 characters.
Birthdate	The contact's birthday. Click the field, and then choose a date from the calendar.
Contact Currency	The default currency for all currency amount fields in the contact. Amounts are displayed in the contact currency and converted to the user's personal currency. Available when multiple currencies are used.
Contact Division	The division that the contact belongs to. This value is inherited from the related account. Available when divisions are used to segment data.
Contact Owner	The contact's assigned owner. Not available in Personal Edition.
Contact Record Type	The name of the field that determines what picklist values are available for the record. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.
Created By	The user who created the contact. Includes creation date and time. Read only.
Custom Links	A list of custom links for contacts, as set up by your administrator.
Department	The associated business or organizational unit. Maximum 80 characters.
Description	The contact's description. Maximum 32 KB of data. The first 255 characters appear in reports.


EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

Field	Description
Email	<p>The contact's email address. A valid email address is required. Maximum 80 characters.</p> <p>Click the email address in this field to send an email using your personal email application. This action isn't logged as an activity on the contact record.</p> <p>If the Gmail Buttons and Links feature is enabled, click the Gmail link next to the field to send an email from your Gmail account.</p>
Fax	The contact's fax number. Maximum 40 characters.
First Name	The contact's first name, as displayed on the contact edit page. Maximum 40 characters.
First Name (Local)	The contact's first name, translated into the local language.
Home Phone	The contact's home phone number. Maximum 40 characters.
Last Modified By	The user who last changed the contact fields, including modification date and time. This field doesn't track changes that were made to any of the related list items on the contact. Read only.
Last Name	The contact's last name as displayed on the contact edit page. Maximum 80 characters.
Last Name (Local)	The contact's last name, translated into the local language.
Lead Source	The record source: for example, Advertisement, Partner, or Web. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters for each picklist value.
Mailing City	The city in the mailing address. Maximum 40 characters.
Mailing Country	The country in the mailing address. Maximum 80 characters.
Mailing State/Province	The state or province in the mailing address. Maximum 80 characters.
Mailing Street	The street in the mailing address. Maximum 255 characters.
Mailing Zip/Postal Code	The zip or postal code in the mailing address. Maximum 20 characters.
Middle Name	<p>The contact's middle name, as displayed on the contact edit page. Maximum 40 characters.</p> <p>To enable this field, contact Salesforce Customer Support. Next, from Setup, enter <i>User Interface</i> in the Quick Find box, then select User Interface. Then select Enable Middle Names for Person Names.</p>

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

Field	Description
Username	<p>For Self-Service contacts only. The <code>username</code> defaults to the <code>email</code>. Contacts enter their usernames when logging in to the Self-Service portal.</p> <p> Note: Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal.</p>

SEE ALSO:

[Considerations for Creating Contacts](#)

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

Manage a Sales Team

Set up sales territories and organize your reps into selling teams. Plus, forecast sales revenues based on your opportunity pipeline.

[Collaborative Forecasts](#)

Predict sales revenue and quantities from your opportunity pipeline.

[Enterprise Territory Management](#)

Model your sales territories into a logical but flexible structure that connects sales reps to the accounts they sell to.

[Opportunity Teams and Opportunity Splits](#)

Set up opportunity teams to make it easier for sales reps to track and collaborate on specific opportunities. Opportunity splits lets you share revenue from a Close-Won opportunity among team members.

[Improve Performance with Work.com](#)

Work.com is a suite of sales-management and service-management tools that help managers and teams learn faster and perform better. This includes recognition tied to real rewards, detailed goals and real-time coaching, and full-featured performance reviews.

[Manage Multiple Currencies](#)

Your organization can set up the ability to use multiple currencies in opportunities, forecasts, quotes, reports, and other data.


[Guide Users with Path](#)

Path guides your users along the steps in a process, such as working an opportunity from a fresh lead to a successfully closed deal. Path is available for accounts, leads, campaigns, opportunities, quotes, contracts, orders, cases, and custom objects in Lightning Experience, and for accounts, campaigns, and opportunities in all versions of the Salesforce app.

Collaborative Forecasts

Predict sales revenue and quantities from your opportunity pipeline.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Watch a Demo:  [Forecast Accurately with Collaborative Forecasts in Lightning Experience \(English only\)](#)

[Configure Collaborative Forecasts](#)

Set up Salesforce so that your sales team can get the most from Collaborative Forecasts.

[Set Up Quotas in Collaborative Forecasts](#)

Enable quotas in Collaborative Forecasts so that users can upload and display quotas alongside forecast amounts.

[Enable Adjustments in Collaborative Forecasts](#)

Enable forecast adjustments in Collaborative Forecasts so that your sales team can adjust forecasts as needed.

[Set Up Cumulative Forecast Rollups in Collaborative Forecasts](#)

Specify how your sales team rolls up opportunities into Collaborative Forecasts.

[Set Up Forecast Types in Collaborative Forecasts](#)

Use forecast types to give your sales team maximum flexibility with Collaborative Forecasts.

[Predict Sales with Collaborative Forecasts](#)

Collaborative Forecasts makes it easy to predict sales revenue and quantities.

[View and Edit Forecasts in Collaborative Forecasts](#)

Learn about several basic tasks to help you view and edit forecast information.

[Manage Forecast Types in Collaborative Forecasts](#)

Learn about the forecast types available.

[Manage Forecast Adjustments in Collaborative Forecasts](#)

Collaborative Forecasts users who anticipate differences between the current forecast and actual future results can change forecast rollup amounts.

[Manage Your Quotas in Collaborative Forecasts](#)

A forecast quota is the monthly or quarterly sales goal that's assigned to a sales team member. A manager's quota equals the amount that the manager and team are expected to generate together. The quota rollup is done manually by users and managers, and revenue or quantity data can be used. If you have multiple types of forecasts enabled, each type maintains separate quota information.

[Things to Know About Collaborative Forecasts](#)

Review considerations, guidelines, and limitations for using Collaborative Forecasts.

EDITIONS


Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Configure Collaborative Forecasts

Set up Salesforce so that your sales team can get the most from Collaborative Forecasts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

[Define Forecasts Settings in Collaborative Forecasts](#)

Choose the types of forecasts that you want and the details that appear on the forecasts page so that your sales team can see the revenue and quantity projections from the sales pipeline.

[Enable Users in Collaborative Forecasts](#)

Set up Salesforce so that your sales team can use Collaborative Forecasts.

[Enable Partner Portal Users to Add Collaborative Forecasts Opportunities in Collaborative Forecasts](#)

If your sales team works with partners, you can include the amounts from partner user opportunities in forecasts and add partner portal users to your team's forecast hierarchy. Your partner portal users can't access the Collaborative Forecasts page or its functionality.

[Set Up Your Forecast Hierarchy in Collaborative Forecasts](#)

Your forecast hierarchy lists all forecast users and determines how their forecasts roll up through your company. Keep your forecast hierarchy up to date to ensure that forecast managers see all subordinates' forecast amounts.

[Select a Forecast Currency in Collaborative Forecasts](#)

Choose the forecast currency option that's right for your sales team.

[Define Your Company's Forecast Date Range](#)

The forecasts grid shows forecast amounts for individual months or quarters and a range of months or quarters, depending on your settings.

[Display Fields in the Opportunity List in Collaborative Forecasts](#)

Select up to 15 standard and custom fields to appear in the opportunity pane for each enabled forecast type.

[Customize Forecast Categories in Collaborative Forecasts](#)

A forecast category is the category within the sales cycle to which an opportunity is assigned based on its opportunity stage. The standard forecast categories are Pipeline, Best Case, Commit, Omitted, and Closed. You can customize the forecast category names.

[View and Update Opportunity-Stage-to-Forecast-Category Mappings in Collaborative Forecasts](#)

Forecasts rely on how opportunity Stage picklist values map to values in the Forecast Category picklist. For example, if you map the Negotiation/Review stage to the Best Case forecast category, the amounts of your opportunities in Negotiation/Review are included in your Best Case forecast amount. If the stage of an opportunity changes, the probability and forecast category also change.

[Add a Forecasts Tab](#)

Make sure that your users can easily access forecasts.

SEE ALSO:

[Trailhead: Optimize Sales Forecasts](#)

[Collaborative Forecasts Implementation Guide](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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

Define Forecasts Settings in Collaborative Forecasts

USER PERMISSIONS

To view Forecasts setup:	View Setup and Configuration
To edit Forecasts settings:	Customize Application
To enable Forecasts users:	Manage Internal Users AND Customize Application
To manage quotas:	Customize Application AND Manage Quotas
To upload quota data to Salesforce:	Manage Quotas AND View All Forecasts


EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Choose the types of forecasts that you want and the details that appear on the forecasts page so that your sales team can see the revenue and quantity projections from the sales pipeline.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

 **Important:** Don't disable the new user interface theme in Salesforce Classic or enable original [Territory Management](#). You can enable Enterprise Territory Management, but forecast rollups are based on the role hierarchy and not the territory hierarchy.

- From Setup, enter *Forecasts Settings* in the Quick Find box, then select **Forecasts Settings**. If Collaborative Forecasts isn't enabled, select **Enable forecasts**.
- If you don't have a forecast type enabled, click **Add a Forecast Type**. To enable another forecast type, click **Add another forecast type**.
- Select the [forecast type](#) that you want to add. Depending on your configurations, you can choose Opportunities, Opportunity Splits, Overlay Splits, Product Families, or a custom opportunity currency field.
- Select the forecast measurement that you want to use—**Revenue** or **Quantity**. If you want forecasts for both, add separate forecast types for each.
Not every forecast type supports both measurements. For example, Opportunity Splits forecasts work only with revenue.
- If you're using Lightning Experience and you selected product family forecasts, specify the product families that your users can forecast on and the order they appear in. If you selected product family forecasts and you don't specify product families, users see an error message and can't access the forecasts page.
- Select the [fields that appear in the opportunity pane](#) of a forecasts page.
You can choose a different set of fields for each forecast type.
- Click **OK**.
- Enable [forecasts adjustments](#) for your company and for specific users.
- Enable [cumulative forecast rollups](#).

10. Under Configure the Default Forecast Display, select a forecast period. Standard and custom fiscal years are supported.
11. Under Configure the Default Forecast Display, select a beginning period and the number of periods to show. This setting becomes the default for all Collaborative Forecasts users until they change it on the forecasts page.
12. If you need to, customize your [Forecast Categories](#).
13. If your company uses multiple currencies, select the [currency](#) in which your users forecast.
14. [Enable quotas](#).
15. Save your changes.
16. [Enable users](#) who need to use Collaborative Forecasts.
17. [Set up your forecasts hierarchy](#) to determine how forecasts roll up and who can view and adjust them.
18. [Add a Forecasts tab](#) and make sure it's visible to the users who need it.
19. Return to the Forecasts Settings page to update settings as needed.

SEE ALSO:

- [Collaborative Forecasts Concepts](#)
- [Guidelines for Setting Up Collaborative Forecasts](#)
- [Considerations for Disabling Collaborative Forecasts](#)


Enable Users in Collaborative Forecasts

Set up Salesforce so that your sales team can use Collaborative Forecasts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. From Setup, enter *users* in the **Quick Find** box, then select **Users**.
2. For each user that you want to enable, click **Edit**.
3. Under General Information, select **Allow Forecasting**.
4. Save your changes.

Enabled users are listed in your forecast hierarchy. When you configure your forecast hierarchy, you can enable more users or disable users that you've enabled.

 **Note:** Users need the View Roles and Role Hierarchy permission to access the forecasts page in Lightning Experience. This permission is assigned to all forecast users by default. The View Roles and Role Hierarchy permission is enabled for all Standard user types (full CRM license with user type S) and standard and custom profiles. You can also enable it for Power Customer Success (type C) and Power Portal User (type P) users. In addition, enabling the following user permissions automatically enables View Roles and Role Hierarchy.

- View Setup and Configuration
- View All Forecasts
- Override Forecasts

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable Forecasts users:

- Manage Users
- AND
- Customize Application

- Delegated External Portal User

SEE ALSO:


[Collaborative Forecasts Concepts](#)

[Enable Partner Portal Users to Add Collaborative Forecasts Opportunities in Collaborative Forecasts](#)

[Guidelines for Setting Up Collaborative Forecasts](#)

Enable Partner Portal Users to Add Collaborative Forecasts Opportunities in Collaborative Forecasts

If your sales team works with partners, you can include the amounts from partner user opportunities in forecasts and add partner portal users to your team's forecast hierarchy. Your partner portal users can't access the Collaborative Forecasts page or its functionality.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. Make sure that you've done the following.
 - Enabled partner portals
 - Created a partner portal
 - Created a partner profile and assigned it to your partner portal
 - Enabled an account as a partner, and enabled partner portal login for a contact of that account
2. From Setup, enter *Users* in the **Quick Find** box, then select **Users** and select the partner portal contact that you created.
3. Make sure that the **Active** and **Allow Forecasting** checkboxes are selected.
4. Enable the partner portal user in the forecast hierarchy, and make sure that the person is assigned to an active forecast manager.

SEE ALSO:

[Collaborative Forecasts Concepts](#)

[Guidelines for Setting Up Collaborative Forecasts](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable Forecasts users:

- Manage Internal Users

AND


Customize Application

To assign partner profiles to partner portals:

- Customize Application

Set Up Your Forecast Hierarchy in Collaborative Forecasts

Your forecast hierarchy lists all forecast users and determines how their forecasts roll up through your company. Keep your forecast hierarchy up to date to ensure that forecast managers see all subordinates' forecast amounts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

When you assign someone as a forecast manager, all forecasts and adjustments from the manager's subordinates in the hierarchy roll up into the manager's forecasts. Assign a forecast manager to the top level of the forecast hierarchy.

To ensure that the forecast visibility rolls up to every level of the hierarchy, make sure that each sales manager with subordinates is designated as a forecast manager in your forecast hierarchy.

1. From Setup, enter *Forecasts Hierarchy* in the **Quick Find** box, then select **Forecasts Hierarchy**.
2. Click **Expand All** to see the available roles.
3. Click **Enable Users** and then **Add** and **Remove** to move users between the Available Users list and the Enabled Users list. If you previously enabled a user from Setup by entering *Users* in the **Quick Find** box, selecting **Users**, and then editing a user page to allow forecasting, the name appears in the Enabled Users list.
4. To select a forecast manager for each manager role in the hierarchy, click **Edit Manager** next to the role, and then select a name from the Forecast Manager dropdown list.
5. Save your changes.

SEE ALSO:

[Collaborative Forecasts Concepts](#)

[Enable Forecast Adjustments in Collaborative Forecasts](#)

[Enable Users in Collaborative Forecasts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud


USER PERMISSIONS

To enable Forecasts users:

- Manage Users
- AND
- Customize Application

Select a Forecast Currency in Collaborative Forecasts

Choose the forecast currency option that's right for your sales team.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. Review the information in [Multiple Currencies in Forecasts](#).
2. From Setup, enter *Forecasts Settings* in the **Quick Find** box, then select **Forecasts Settings**.
3. Next to Forecast Currency, choose a forecast currency option.
4. Save your changes.

SEE ALSO:

[Collaborative Forecasts Concepts](#)

[Adjusting Forecasts in Collaborative Forecasts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud


USER PERMISSIONS


To enable Forecasts users:

- Manage Users
- AND
- Customize Application

Define Your Company's Forecast Date Range

The forecasts grid shows forecast amounts for individual months or quarters and a range of months or quarters, depending on your settings.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

 **Warning:** If you change the time period from monthly to quarterly or quarterly to monthly, or you change the standard fiscal year, all adjustments and quotas are purged. If you enable custom fiscal years, creating the first custom fiscal year deletes any quotas and adjustments in the corresponding and subsequent standard fiscal years. These changes trigger a forecast recalculation that can take significant time, depending on the quantity of your data.

If you use custom fiscal years, your custom periods or quarters are displayed. Users can forecast up to 12 months or eight quarters in the future or past. If your forecast range includes the current month or quarter, the forecasts page displays the current month or quarter by default. If not, the first month or quarter of the range is selected.

The forecast date range becomes the default for all Collaborative Forecasts users. Users can use this default, or they can set a different date range display for their own forecasts. After users change their individual forecast date range displays, Salesforce admins can't override them. However, when changing the *period* display from monthly to quarterly or quarterly to monthly, the change is reflected in all users' forecasts.

1. From Setup, enter *Forecasts Settings* in the Quick Find box, then select **Forecasts Settings**.
2. Under Configure the Default Forecast Display, select a beginning period and the number of periods to show.
3. Save your changes.

SEE ALSO:

[Collaborative Forecasts Concepts](#)

[Guidelines for Setting Up Collaborative Forecasts](#)

[Change Your Forecast Date Range Display in Collaborative Forecasts](#)

[Monthly and Quarterly Forecast Amounts in Collaborative Forecasts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud


USER PERMISSIONS

To enable Forecasts users:

- Manage Users
- AND
- Customize Application

Display Fields in the Opportunity List in Collaborative Forecasts

Select up to 15 standard and custom fields to appear in the opportunity pane for each enabled forecast type.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. From Setup, enter *Forecasts Settings* in the **Quick Find** box, then select **Forecasts Settings**.
2. Click the name of the forecast type whose opportunity fields you want to edit.
3. Select the Opportunity fields to display in the list. Arrange the fields from top to bottom to order them left to right in the list.
4. Click **OK**, and then save your changes.

SEE ALSO:

[Guidelines for Displaying Fields in the Opportunity List in Collaborative Forecasts](#)

[Collaborative Forecasts Concepts](#)

[Guidelines for Setting Up Collaborative Forecasts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To customize the opportunity pane:


- Customize Application

To view setup and configuration:

- View Setup and Configuration

Customize Forecast Categories in Collaborative Forecasts

A forecast category is the category within the sales cycle to which an opportunity is assigned based on its opportunity stage. The standard forecast categories are Pipeline, Best Case, Commit, Omitted, and Closed. You can customize the forecast category names.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. From the management settings for opportunities, go to Fields.
2. Click **Forecast Category**.
3. Click **Edit** for any value that you want to edit in the Forecasts Category Picklist Values.
4. Enter a forecast category name.
5. Save your changes.

New forecast category names appear on opportunity records and forecasts.

SEE ALSO:

- [Collaborative Forecasts Concepts](#)
- [Guidelines for Setting Up Collaborative Forecasts](#)
- [Find Object Management Settings](#)

View and Update Opportunity-Stage-to-Forecast-Category Mappings in Collaborative Forecasts

Forecasts rely on how opportunity Stage picklist values map to values in the Forecast Category picklist. For example, if you map the Negotiation/Review stage to the Best Case forecast category, the amounts of your opportunities in Negotiation/Review are included in your Best Case forecast amount. If the stage of an opportunity changes, the probability and forecast category also change.

Here's an example mapping.

Stage	Probability	Forecast Category
Prospecting	10%	Pipeline
Qualification	10%	Pipeline
Needs Analysis	20%	Pipeline
Value Proposition	50%	Pipeline
Id Decision Makers	60%	Pipeline
Perception Analysis	70%	Pipeline
Proposal/Price Quote	75%	Pipeline
Negotiation/Review	90%	Best Case
Closed Won	100%	Commit

1. From the management settings for opportunities, go to Fields.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable Forecasts users:

- Manage Users
- AND
- Customize Application

2. Click **Stage**. Each row in Opportunity Stages Picklist Values shows a stage and the forecast category that it's mapped to.
3. Click **Edit** to change a mapping.
4. Save your changes.

SEE ALSO:

[Forecasts FAQ](#)

Add a Forecasts Tab

Make sure that your users can easily access forecasts.

1. From Setup:
 - If you're using Lightning Experience, enter *App Manager* in the Quick Find box, select **App Manager**, and then click **Edit** next to your app.
 - If you're using Salesforce Classic, click **+** and then **Customize My Tabs**.
Move Forecasts from Available Tabs to Selected Tabs, and then save your changes.
2. From Setup, enter *Profiles* in the Quick Find box, and then select **Profiles**.
3. Select the profile that needs access to forecasts.
4. Click **Object Settings** and then **Forecasts**.
5. Click **Edit**.
6. From the Tab Settings dropdown list, select **Default On**, and then save your changes.

Set Up Quotas in Collaborative Forecasts

Enable quotas in Collaborative Forecasts so that users can upload and display quotas alongside forecast amounts.

A quota is the monthly or quarterly sales goal that's assigned to a user. A manager's quota equals the amount that the manager and team are expected to generate together. The quota rollup is done manually by users and managers, and revenue or quantity data can be used. If multiple types of forecasts are enabled, each forecast type maintains separate quota information.

[Enable Quotas in Collaborative Forecasts](#)

If you have API access, you can upload quotas for Collaborative Forecasts users and display them alongside your sales team's forecast amounts.

[Load Quota Data in Collaborative Forecasts](#)

Load quota data for forecasts with Data Loader or Salesforce APIs.

SEE ALSO:

[Trailhead: Optimize Sales Forecasts](#)

[Collaborative Forecasts Implementation Guide](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Available in: **Professional** Edition with the "API Enabled" permission

Enable Quotas in Collaborative Forecasts

USER PERMISSIONS

To view Forecasts setup:	View Setup and Configuration
To edit Forecasts settings:	Customize Application
To enable Forecasts users:	Manage Internal Users AND Customize Application
To manage quotas:	Customize Application AND Manage Quotas
To upload quota data to Salesforce:	Manage Quotas AND View All Forecasts


EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Available in: **Professional** Edition with the "API Enabled" permission

If you have API access, you can upload quotas for Collaborative Forecasts users and display them alongside your sales team's forecast amounts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. From Setup, enter *Forecasts Settings* in the Quick Find box, then select **Forecasts Settings**.
2. Under Configure the Default Forecast Display, select **Show quotas**.
3. Save your changes.

If you disable Collaborative Forecasts, quotas are disabled.

When you change your data source or disable revenue or quantity forecasts, related quotas are purged.

SEE ALSO:

[Load Quota Data in Collaborative Forecasts](#)

[Collaborative Forecasts Concepts](#)

[Guidelines for Setting Up Collaborative Forecasts](#)

Load Quota Data in Collaborative Forecasts

USER PERMISSIONS

To view Forecasts setup:	View Setup and Configuration
To edit Forecasts settings:	Customize Application
To enable Forecasts users:	Manage Internal Users AND Customize Application
To manage quotas:	Customize Application AND Manage Quotas
To upload quota data to Salesforce:	Manage Quotas AND View All Forecasts


EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Available in: **Professional** Edition with the "API Enabled" permission

Load quota data for forecasts with Data Loader or Salesforce APIs.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Data Loader provides a simple point-and-click method for adding, inspecting, and editing data in Salesforce. APIs provide more flexibility but require you to write code. To use either method, make sure that API access is enabled. See [Data Loader](#) for details.

Add Quotas with Data Loader

Before you upload quotas, consider the version of Data Loader that you're using. For Data Loader v.30 and later, specify the forecast type of each quota that you plan to upload.

1. Query the User object for your users' IDs.
 - Use Data Loader to retrieve your users' IDs.
 - a. From Setup, enter *Data Loader* in the *Quick Find* box, then select **Data Loader**.
 - b. Download and install Data Loader.
 - c. Launch Data Loader.
 - d. Click **Export**.
 - e. Enter your user name and password, and then click **Log in**.
 - f. Click **Next**.
 - g. Select the User object from the list.
 - h. Choose a file name and destination for the exported data.
 - i. Click **Next**.
 - j. Select the **Id** and **Name** fields.
 - k. Click **Finish** and then **Yes**.
 - l. Click **View Extraction**.

- m. Click **Open in external program**.
 - n. Save the file in the .csv format. Add user names and IDs to your quotas spreadsheet before uploading it.
2. If you're using Data Loader v.30 or later, query the ForecastingType object to get the IDs of your forecast types. If you're not using Data Loader v.30 or later, skip to step 3.
 - a. Launch Data Loader.
 - b. Click **Export**.
 - c. Enter your user name and password, and then click **Log in**.
 - d. Click **Next**.
 - e. Click **Show all Salesforce objects**.
 - f. Select the Forecasting Type object from the list.
 - g. Choose a file name and destination for the exported data.
 - h. Click **Next**.
 - i. Select the **Id** and **DeveloperName** fields.
 - j. Click **Finish** and then **Yes**.
 - k. Click **View Extraction**.
 - l. Click **Open in external program**.
 - m. Save the file in the .csv format.
 - n. Note the `DeveloperName` and `Id` values for each active forecast type. Not all companies use all forecast types that appear in the results. Review this list if you're not sure which forecast type a specific `DeveloperName` refers to.
 - `OpportunityRevenue` : Opportunities - Revenue
 - `OpportunityQuantity` : Opportunities - Quantity
 - `OpportunitySplitRevenue` : Opportunity Revenue Splits - Revenue
 - `OpportunityOverlayRevenue` : Opportunity Overlay Splits - Revenue
 - `OpportunityLineItemRevenue` : Product Families - Revenue
 - `OpportunityLineItemQuantity` : Product Families - Quantity
 - The name of a custom opportunity split type that has been enabled as a forecast type. Custom split types are based on currency fields, which can contain revenue amounts only.
 - o. Add columns for `DeveloperName` and `Id` to your quota spreadsheet, and then add the name and ID of the forecast type of your quotas to each row. The name is not necessary for uploading quotas, but it helps to know which forecast type you're working with in each row.
3. Prepare your quota spreadsheet for upload.
 - If you're using Data Loader v.30 or later, create a .csv file with columns for User Name, User ID, Forecast Type Name, Forecast Type ID, Quota Amount, Quota Quantity, Currency Code, and forecast period Start Date [`yyyy-mm-dd` or `yyyy-mm-ddThh:mm:ss.sssZ`; for example, 2012-03-01T08:00:00.00Z].
 - If you're using Data Loader v.29 or earlier, create a .csv file with columns for User Name, User ID, Quota Amount, Quota Quantity, Currency Code, and forecast period Start Date [`yyyy-mm-dd` or `yyyy-mm-ddThh:mm:ss.sssZ`; for example, 2012-03-01T08:00:00.00Z]. If you use revenue *and* quantity forecasts, specify the quotas for them on separate rows of your .csv file.

You don't need the User Name or Forecast Type Name columns, but including them makes it easy to understand the contents of your .csv file.

User Name	User ID	Forecast Type Name (for Data Loader v.30 or later)	Forecast Type ID (for Data Loader v.30 or later)	Quota Amount	Quota Quantity	Currency Code	Start Date
Kevin Bailey	00599000000Hofh	OpportunityRevenue	0DbD00000001eQBKAY	250000		USD	2012-03-01
Kevin Bailey	00599000000Hofh	OpportunityRevenue	0DbD00000001eQBKAY	250000		USD	2012-04-01
Kevin Bailey	00599000000Hofh	OpportunityRevenue	0DbD00000001eQBKAY	250000		USD	2012-05-01
Kevin Bailey	00599000000Hofh	OpportunityQuantity	0DbD00000001eQAKAY		500		2012-03-01
Kevin Bailey	00599000000Hofh	OpportunityQuantity	0DbD00000001eQAKAY		500		2012-04-01
Kevin Bailey	00599000000Hofh	OpportunityQuantity	0DbD00000001eQAKAY		500		2012-05-01

If your forecast data source is product families, include a Product Family column.

User Name	User ID	Forecast Type Name (for Data Loader v.30 or later)	Forecast Type ID (for Data Loader v.30 or later)	Product Family	Quota Amount	Quota Quantity	Currency Code	Start Date
Kevin Bailey	00599000000Hofh	OpportunityLineItemRevenue	0DbD00000001eQ9KAI	Hardware	250000		USD	2012-03-01
Kevin Bailey	00599000000Hofh	OpportunityLineItemRevenue	0DbD00000001eQ9KAI	Software	150000		USD	2012-03-01
Kevin Bailey	00599000000Hofh	OpportunityLineItemRevenue	0DbD00000001eQ9KAI	Services	50000		USD	2012-03-01
Kevin Bailey	00599000000Hofh	OpportunityLineItemQuantity	0DbD00000001eQ8KAI	Hardware		500		2012-03-01
Kevin Bailey	00599000000Hofh	OpportunityLineItemQuantity	0DbD00000001eQ8KAI	Software		300		2012-03-01
Kevin Bailey	00599000000Hofh	OpportunityLineItemQuantity	0DbD00000001eQ8KAI	Services		100		2012-03-01

4. Use Data Loader to upload your quota information to Salesforce.
 - a. Launch Data Loader.
 - b. Click **Insert**.
 - c. Log in with your user name and password.
 - d. Click **Next**.
 - e. Click **Show All Salesforce Objects**.
 - f. Select the Forecasting Quota object from the list.
 - g. Click **Browse**, and then choose the .csv file to upload.
 - h. Click **Next**.
 - i. Click **OK** in the Data Selection dialog box.
 - j. Click **Create or Edit a Map**.
 - k. Map columns to fields in the ForecastingQuota object as shown in this table.

Column Headers in CSV File	ForecastingQuota Fields
User ID	QuotaOwnerID
Quota Amount	QuotaAmount
Quota Quantity	QuotaQuantity
Currency Code	CurrencyIsoCode
Start Date	StartDate
Product Family (needed only when the forecast data source is Product Families)	ProductFamily
Forecast Type ID (needed only for Data Loader v.30 or later)	ForecastingTypeID

- l.** Click **OK**.
- m.** Click **Next**.
- n.** Click **Browse**, and then choose the directory where you want to save the log file containing messages about the success or failure of the upload.
- o.** Click **Finish**.
- p.** Click **Yes** to proceed with the upload.
- q.** Click **OK**.

As a best practice, load quota data in the quota owner's [personal currency](#). You can still upload quota data using the API even if `Show Quotas` is disabled. If your Data Loader time zone setting is ahead of quota owners' time zones, the month can be off by one. To avoid this problem, use a date greater than or equal to the third day of each month when inserting quotas.

Uploading Quotas with the API

When uploading quota information with the API, be sure to use the correct API version, depending on the type of quota data that you're working with. If multiple types of forecasts are enabled, each forecast type maintains separate quota information.


When importing...	Use API version...
Revenue quotas for opportunity-based forecasts	25.0 or later
Quantity quotas for opportunity-based forecasts	28.0 or later
Revenue quotas for opportunity splits-based forecasts	29.0 or later
Revenue or quantity quotas for product family-based forecasts	29.0 or later
Quotas in orgs with multiple forecast types enabled	30.0 or later

SEE ALSO:

- [Why do date fields import incorrectly when I use the Data Loader?](#)
- [Enable Quotas in Collaborative Forecasts](#)

Enable Adjustments in Collaborative Forecasts

Enable forecast adjustments in Collaborative Forecasts so that your sales team can adjust forecasts as needed.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Enable Forecast Adjustments in Collaborative Forecasts

Enable managers to adjust subordinates' forecasts, all forecast users to adjust their own forecasts, or both.

Disable Forecast Adjustments in Collaborative Forecasts

If you no longer want forecast managers to adjust subordinates' forecast amounts or forecast owners to adjust their own forecasts, turn off forecast adjustments. Updating user permissions isn't required.


SEE ALSO:

[Trailhead: Optimize Sales Forecasts](#)


[Collaborative Forecasts Implementation Guide](#)

Enable Forecast Adjustments in Collaborative Forecasts

Enable managers to adjust subordinates' forecasts, all forecast users to adjust their own forecasts, or both.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. [Set up your forecast hierarchy](#).
2. From Setup, enter *Forecasts Settings* in the **Quick Find** box, then select **Forecasts Settings**.
3. To let forecast managers adjust their subordinates' forecast amounts, under Enable Forecast Adjustments, select **Enable manager adjustments**.
4. To let all forecast users adjust their own forecast amounts, under Enable Forecast Adjustments, select **Enable owner adjustments**.

 **Note:** If you use product family forecasts, you can't adjust your own product family forecast amounts in Salesforce Classic.

5. Save your changes.
6. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
7. Find a profile for which you want adjustments enabled.
8. If you're using the enhanced profile user interface, click **App Permissions** and then **Edit**.
9. Select **Override Forecasts**, and then save your changes.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable Forecasts users:

- Manage Users
- AND
- Customize Application

If multiple types of forecasts are enabled, each forecast type maintains separate adjustments.


SEE ALSO:

- [Collaborative Forecasts Concepts](#)
- [Adjusting Forecasts in Collaborative Forecasts](#)
- [Guidelines for Setting Up Collaborative Forecasts](#)
- [Define Your Company's Forecast Date Range](#)

Disable Forecast Adjustments in Collaborative Forecasts

If you no longer want forecast managers to adjust subordinates' forecast amounts or forecast owners to adjust their own forecasts, turn off forecast adjustments. Updating user permissions isn't required.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

 **Warning:** Disabling forecast adjustments purges existing adjustments for all forecast types. Before disabling adjustments, see [Adjustments Purges in Collaborative Forecasts](#). Disabling certain functionality can result in purged quota and adjustment data, so consider exporting your data before disabling anything. When you complete your setting changes, you can import the data back into Salesforce.

1. From Setup, enter *Forecasts Settings* in the **Quick Find** box, then select **Forecasts Settings**.
2. To prevent forecast managers from adjusting subordinates' forecast amounts, under **Enable Forecast Adjustments**, deselect **Enable manager adjustments**.
3. To prevent all forecast users from adjusting their own forecast amounts, under **Enable Forecast Adjustments**, deselect **Enable owner adjustments**.
4. Save your changes.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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USER PERMISSIONS

To enable Forecasts users:

- Manage Users
- AND
- Customize Application

Set Up Cumulative Forecast Rollups in Collaborative Forecasts

Specify how your sales team rolls up opportunities into Collaborative Forecasts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

[Cumulative Forecast Rollups in Collaborative Forecasts](#)

Learn about methods for rolling up opportunities into forecasts for your sales teams.

[Enable Cumulative Forecast Rollups in Collaborative Forecasts](#)

Choose between Cumulative Forecast Rollup columns or individual forecast category columns.


SEE ALSO:

[Trailhead: Optimize Sales Forecasts](#)

[Collaborative Forecasts Implementation Guide](#)

Cumulative Forecast Rollups in Collaborative Forecasts

Learn about methods for rolling up opportunities into forecasts for your sales teams.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

- Individual forecast category rollups combine the opportunities from each individual forecast category into separate forecast amounts for each category.
- Cumulative forecast rollups combine opportunities from multiple forecast categories into cumulative forecast amounts.

The default rollup setting is individual forecast category rollups. If you choose cumulative forecast rollups, the way opportunities roll up to forecast amounts is different. The column names on the forecasts page are also different.

Category Rollup Method	Column Name on the Forecasts Page	Opportunities That Roll Up to It
Individual	Pipeline	Pipeline
	Best Case	Best Case
	Commit	Commit
	Closed	Closed
Cumulative	Open Pipeline	<ul style="list-style-type: none"> • Pipeline • Best Case • Commit
	Best Case Forecast	<ul style="list-style-type: none"> • Best Case • Commit

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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Category Rollup Method	Column Name on the Forecasts Page	Opportunities That Roll Up to It
		<ul style="list-style-type: none"> • Closed
	Commit Forecast	<ul style="list-style-type: none"> • Commit • Closed
	Closed Only	Closed

Advantages of Cumulative Forecast Rollups

With individual forecast category rollups, each total and subtotal represents opportunities from only one of the individual forecast categories. This type of rollup means that if forecast users want to know the total that they're going to bring for the month or quarter, they need to add the Best Case, Commit, and Closed forecast amounts together.

Example: Individual Forecast Rollup				
Forecast amounts	Closed	Commit	Best Case	Pipeline
	\$50	\$100	\$150	\$200
Opportunities	Closed	Commit	Best Case	Pipeline
	\$50	<ul style="list-style-type: none"> • \$50 • \$50 	<ul style="list-style-type: none"> • \$50 • \$50 • \$50 	<ul style="list-style-type: none"> • \$50 • \$50 • \$50 • \$50

With Cumulative Forecast Rollups, the forecast columns show cumulative amounts from the opportunities in the named forecast category and subsequent categories in your sales funnel. This view makes it easier for sales team members to see the total numbers that they're likely to bring in without combining the category totals themselves.


For example, this table shows the cumulative forecast rollup amounts when there are four Pipeline, three Best Case, two Commit, and one Closed opportunity, each worth \$50.

Example: Cumulative Forecast Rollup				
Forecast amounts	Closed Only	Commit Forecast	Best Case Forecast	Open Pipeline
	\$50	\$150	\$300	\$450
Opportunities	Closed	Commit	Best Case	Pipeline
	\$50	<ul style="list-style-type: none"> • \$50 • \$50 	<ul style="list-style-type: none"> • \$50 • \$50 • \$50 	<ul style="list-style-type: none"> • \$50 • \$50 • \$50 • \$50

 **Note:** You can't use Forecast Historical Trending with Cumulative Forecast Rollups.

Enable Cumulative Forecast Rollups in Collaborative Forecasts

Choose between Cumulative Forecast Rollup columns or individual forecast category columns.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Changing the forecast column display purges all adjustments to Commit and Best Case forecast amounts, but not quota data.

1. From Setup, enter *Forecasts Settings* in the **Quick Find** box, then select **Forecasts Settings**.
2. Select **Enable cumulative forecast rollups**, and then save your changes.

Set Up Forecast Types in Collaborative Forecasts

Use forecast types to give your sales team maximum flexibility with Collaborative Forecasts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

[Forecast Types in Collaborative Forecasts](#)

A forecast type is a forecast that's configured to use a specific type of data. You can use the opportunity **Amount** field, opportunity splits, overlay splits, custom opportunity fields, or product families. Each forecast type specifies a measurement: revenue or quantity.

[Enable Forecast Types for Collaborative Forecasts](#)

Let your sales team choose from four types of forecasts to predict sales from multiple perspectives.

[Enable Revenue Splits Forecasts or Overlay Splits Forecasts in Collaborative Forecasts](#)

Add revenue splits forecasts so that your sales team can track revenue from opportunities with multiple sales reps. Add overlay forecasts so that your sales team can track revenue from overlay sales roles.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To view Forecasts setup:

- View Setup and Configuration

To edit Forecasts settings:

- Customize Application

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Enable Custom Field Forecasts in Collaborative Forecasts

For each custom opportunity field that your sales team wants to forecast on, enable a custom split type, even if the field doesn't include splits. When a sales rep creates an opportunity, the rep receives a 100% split for any 100% validated custom split type that you enable. So even if you don't intend to split the custom field, the forecast rollup includes 100% of the amount in the custom field.


SEE ALSO:

[Trailhead: Optimize Sales Forecasts](#)

[Collaborative Forecasts Implementation Guide](#)

Forecast Types in Collaborative Forecasts

A forecast type is a forecast that's configured to use a specific type of data. You can use the opportunity `Amount` field, opportunity splits, overlay splits, custom opportunity fields, or product families. Each forecast type specifies a measurement: revenue or quantity.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Forecast Type	What the Rollup Is Based On
Opportunities - Revenue	The opportunity <code>Amount</code> field.
Opportunities - Quantity	The opportunity <code>Quantity</code> field.
Product Families - Revenue	The opportunity <code>Amount</code> field. Forecast amounts are separated by product family. To use a Product Family forecast, use Opportunity Products and Product Families.
Product Families - Quantity	The opportunity <code>Quantity</code> field. Forecast amounts are separated by product family. To use a Product Family forecast, use Opportunity Products and Product Families.
Opportunity Splits - Revenue	The opportunity <code>Amount</code> field and each sales team member's split percentage. For Opportunity Splits - Revenue forecasts, the split percentages for each opportunity must total 100%. To use opportunity splits forecasts, enable Opportunity Teams, Opportunity Splits, and the Revenue split type.
Overlay Splits - Revenue	The opportunity <code>Amount</code> field and each overlay sales team member's split percentage. For Overlay Splits - Revenue forecasts, the split percentages don't need to total 100%. To use overlay splits forecasts, enable Opportunity Teams, Opportunity Splits, and the Overlay split type.
Custom Opportunity Currency Field - Revenue	The amount in the custom opportunity currency field that you specify. To use custom opportunity

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Forecast Type	What the Rollup Is Based On
	currency field forecasts, Opportunity Teams and Opportunity Splits must be enabled. Enable a custom split type for the field, even if you don't intend to split credit for the field amount.
Expected Revenue - Revenue	The amount in the opportunity <code>Expected Revenue</code> field. To forecast on the <code>Expected Revenue</code> field, enable Opportunity Teams and Opportunity Splits. Enable a custom split type for the field, even if you don't intend to split credit for the field amount.

Opportunities

- To forecast on the `Amount` field of opportunities, use an opportunity revenue forecast.
- To forecast on the `Quantity` field of opportunities, use an opportunity quantity forecast.

Product Families

If your company groups its products and services into families and needs to forecast based on those families, use a product family forecast. With product families, keep the following in mind.

- If you're using Lightning Experience, you choose product families to forecast on. The more product families you choose, the more rows appear in the forecasts grid. The forecasts grid shows up to 2,000 rows.
- The Amount column appears in the opportunity list on the forecasts page.
- You can forecast on revenue, quantity, or both.
- Forecast users can view individual product family forecasts for users they have access to view.
- Use Opportunity Products and Product Families.
- We recommend completing the `Product Family` field on each product record. Forecasts for products without a Product Family value appear in a forecast row titled Products Not Categorized. (If an opportunity lacks line items, the opportunity amount or quantity also appears in this row.)
- Product family forecast totals aren't available in Salesforce Classic. If users adjust their product family forecasts in Lightning Experience, not every total in the Salesforce Classic forecasts grid reflects the adjustments.
- In Salesforce Classic, a manager's own product family forecasts aren't available, so they can't be adjusted.
- You can set separate product family quotas for each sales rep but not a single quota for each sales rep.

Opportunity Splits

If your sales team uses team selling and opportunity splits, use an opportunity splits revenue forecast. With opportunity splits, keep the following in mind.

- You can forecast on revenue but not on quantity.
- You must have Team Selling, Opportunity Splits, and the Revenue split type enabled.
- In Salesforce Classic, an opportunity that contains only a single 100% revenue split shows "--" for the split percentage in the opportunity list.

Overlay Splits

Use overlay splits to track revenue from sales team members who help close opportunities but aren't directly responsible for them.

- The overlay splits on a specific opportunity don't have to total 100%.
- You can forecast on revenue but not on quantity.
- You must have Team Selling, Opportunity Splits, and the Overlay split type enabled.

Custom Opportunity Currency Fields

If you use custom currency fields on opportunities, you can forecast on the amounts in those fields.

- Because the field must be a custom currency field, you can forecast on revenue but not quantity.
- You can forecast on the custom field regardless of whether it includes opportunity splits.
- Regardless of whether the field uses splits, you must have Team Selling, Opportunity Splits, and a custom split type enabled for the field.

Expected Revenue

If the value of the `Amount` field and the actual revenue brought in by the opportunity often differ, the `Expected Revenue` field on opportunities is useful. If your sales team anticipates this difference, consider using the `Expected Revenue` field and forecasting on it.

- You can forecast on revenue but not quantity.
- You can forecast on the `Expected Revenue` field regardless of whether you use opportunity splits with it.
- Regardless of whether you use splits with the `Expected Revenue` field, you must enable Team Selling, Opportunity Splits, and a custom split type for it.

When you enable multiple types of forecasts, Custom Forecast Views lets you customize the opportunity information that's displayed for each forecast.

For example, if your sales team forecasts revenue from opportunities and product families, enable opportunity and product family forecasts based on revenue.

Here you can see the forecasts page with the opportunity revenue forecast type selected. This view shows revenue totals for each sales rep in each forecast rollup.

FORECASTS Bryce Knell				
MONTHS	CLOSED ONLY	COMMIT FORECAST	BEST CASE FORECAST	OPEN PIPELINE
Total: 3 Months	USD 2,296,600.00	USD 17,133,760.88	USD 23,219,440.88	USD 56,075,038.50
October FY 2017	USD 255,000.00	USD 3,810,115.17	USD 9,844,115.17	USD 23,216,565.17
Alan Wo... →	USD 150,000.00	USD 3,260,000.00	USD 3,700,000.00	USD 12,762,250.00
Allison ... →	USD 45,000.00	USD 45,000.00	USD 45,000.00	USD 191,000.00
Brent Ba... →	USD 50,000.00	USD 495,115.17	USD 539,115.17	USD 489,115.17
Noah La... →	USD 10,000.00	USD 10,000.00	USD 5,560,000.00	USD 8,569,700.00
My Opportuni...	USD 0.00	USD 0.00	USD 0.00	USD 1,204,500.00
November FY 2017	USD 1,850,000.00	USD 8,074,000.00	USD 8,105,680.00	USD 15,704,580.00
December FY 2017	USD 191,600.00	USD 5,249,645.71	USD 5,269,645.71	USD 17,153,893.33

Each user can change the forecast view from one forecast type to another by using the forecast type menu.

FORECASTS Bryce Knell				
MONTHS	CLOSED ONLY	COMMIT FORECAST	BEST CASE FORECAST	OPEN PIPELINE
Total: 3 Months	USD 2,296,600.00	USD 17,133,760.88	USD 23,219,440.88	USD 56,075,038.50
October FY 2017	USD 255,000.00	USD 3,810,115.17	USD 9,844,115.17	USD 23,216,565.17
Alan Wo... →	USD 150,000.00	USD 3,260,000.00	USD 3,700,000.00	USD 12,762,250.00
Allison ... →	USD 45,000.00	USD 45,000.00	USD 45,000.00	USD 191,000.00
Brent Ba... →	USD 50,000.00	USD 495,115.17	USD 539,115.17	USD 489,115.17
Noah La... →	USD 10,000.00	USD 10,000.00	USD 5,560,000.00	USD 8,569,700.00
My Opportuni...	USD 0.00	USD 0.00	USD 0.00	USD 1,204,500.00
November FY 2017	USD 1,850,000.00	USD 8,074,000.00	USD 8,105,680.00	USD 15,704,580.00
December FY 2017	USD 191,600.00	USD 5,249,645.71	USD 5,269,645.71	USD 17,153,893.33

RANGE

- Set Forecast Range

DISPLAY OPTIONS

- Show Quota Column

FORECAST TYPE


- Annual Contract Value
- Opportunity Revenue
- Opportunity Split Revenue
- Product Family Revenue

CURRENCY

- Change currency...

Enable Forecast Types for Collaborative Forecasts


Let your sales team choose from four types of forecasts to predict sales from multiple perspectives.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

With opportunities and product families, you can set up forecast types for quantity and revenue. With opportunity splits, the only choice is revenue.

When you enable a forecast type, the initial calculation of the new forecast can take some time. The more opportunities, users, and product families in Salesforce, the more rows in the forecasts grid. The forecasts grid can show up to 2,000 rows.

1. [Review the details](#) of each forecast type.
2. From Setup, enter *Forecasts Settings* in the Quick Find box, then select **Forecasts Settings**.
3. Do one of the following.
 - If you don't have forecast types enabled, click **Add a Forecast Type**.
 - If you have at least one forecast type enabled, click **Add another forecast type**.
4. From the Forecast Type menu, choose the data source to use for the forecast.
5. Choose the forecast measurement to use: Revenue or Quantity. To use both, add a separate forecast type for each.
6. If you're using Lightning Experience and you selected product family forecasts, choose product families to forecast on.
7. Choose the columns that you want to display in the related opportunities list on the forecasts page for the forecast type. If your forecast data source is opportunities or product families, the `Amount` field appears by default. If your data source is opportunity splits, the `Forecasted Amount` and `Split %` fields appear by default. You can change the selected fields for each forecast type even after it has been enabled. Depending on whether your forecast type uses the revenue or quantity measurement, consider adding `Amount` or `Quantity` to the pane.
8. Click **OK**, and then save your changes.
9. Repeat this procedure for each forecast type that you want to add.

 **Warning:** If you disable a forecast type, all related quota and adjustment information is purged.

SEE ALSO:

[Collaborative Forecasts Concepts](#)

[Guidelines for Setting Up Collaborative Forecasts](#)

[Display Fields in the Opportunity List in Collaborative Forecasts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud


USER PERMISSIONS

To enable a forecast type:

- [Customize Application](#)

Enable Revenue Splits Forecasts or Overlay Splits Forecasts in Collaborative Forecasts

Add revenue splits forecasts so that your sales team can track revenue from opportunities with multiple sales reps. Add overlay forecasts so that your sales team can track revenue from overlay sales roles.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. Make sure that the following are enabled.
 - Collaborative Forecasts
 - Team Selling and Opportunity Splits
 - The revenue opportunity split type or overlay opportunity split type
2. From Setup, enter *Forecasts Settings* in the **Quick Find** box, then select **Forecasts Settings**.
3. Enable up to four forecast types.
 - If you don't have forecast types enabled, click **Add a Forecast Type**.
 - If you have at least one forecast type enabled, click **Add another forecast type**.
4. From the Forecast Type menu, choose **Opportunity Revenue Splits** or **Opportunity Overlay Splits**. Revenue is the only forecast measurement available for overlay splits.
5. Choose the columns to display in the related opportunities list on the forecasts page for the overlay forecast. To make it easy for forecast users to see the split amounts on each opportunity, include the Split column.
6. Click **OK**, and then save your changes.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To view Forecast Setup:


- View Setup and Configuration

To edit Forecast Settings:

- Customize Application

Enable Custom Field Forecasts in Collaborative Forecasts

For each custom opportunity field that your sales team wants to forecast on, enable a custom split type, even if the field doesn't include splits. When a sales rep creates an opportunity, the rep receives a 100% split for any 100% validated custom split type that you enable. So even if you don't intend to split the custom field, the forecast rollup includes 100% of the amount in the custom field.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. Make sure that the following are enabled.
 - Collaborative Forecasts
 - At least one custom opportunity currency field
 - Team Selling and Opportunity Splits
 - A custom opportunity split type based on the custom field
2. From Setup, enter *Forecasts Settings* in the *Quick Find* box, then select **Forecasts Settings**.
3. Enable up to four forecast types.
 - If you don't have forecast types enabled, click **Add a Forecast Type**.
 - If you have at least one forecast type enabled, click **Add Another Forecast Type**.
4. From the Forecast Type menu, choose the name of the custom opportunity split type that you created based on your custom opportunity field. Revenue is the only forecast measurement available for custom field forecasts.
5. Choose the columns to display in the related opportunities list on the forecasts page for the custom field forecast. Include the Split column to make it easy for Collaborative Forecasts users to see the split amounts on each opportunity.
6. Click **OK**, and then save your changes.

SEE ALSO:

[Enable Opportunity Splits](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise, Performance, Unlimited,** and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable opportunity split types:

- Customize Application

To view Forecast Setup:

- View Setup and Configuration

To edit Forecast Settings:

- Customize Application

Predict Sales with Collaborative Forecasts

Collaborative Forecasts makes it easy to predict sales revenue and quantities.



Note: This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Watch a Demo: [Forecast Accurately with Collaborative Forecasts in Lightning Experience \(English only\)](#)

[Collaborative Forecasts Concepts](#)

Predict sales revenue and quantities from your opportunity pipeline, and incorporate product families, opportunity splits, and custom opportunity currency fields if needed.

[Collaborative Forecasts Elements](#)

Collaborative Forecasts lets you find and communicate opportunity and forecast information easily. If you're using Collaborative Forecasts, make sure that you learn about the elements that comprise a forecast.

[Monthly and Quarterly Forecast Amounts in Collaborative Forecasts](#)

The Collaborative Forecasts rollup table displays forecast amounts for individual months or quarters and a range of months or quarters, depending on your Collaborative Forecasts settings. Six months or four quarters is the default. Your admin can also enable custom periods.

[Forecast Hierarchy in Collaborative Forecasts](#)

The forecast hierarchy is a nested, expandable list of forecast users that determines how forecasts roll up within your company and who can view and adjust them. The forecasts hierarchy is based on the role hierarchy and specifies which users are forecast managers.

[Partner Portal User Opportunities in Collaborative Forecasts](#)

Partner portal users are external to your Salesforce org but sell your products and services through indirect sales channels. Your partner portal users use a portal to log in to Salesforce. Partners can create opportunities, and users can assign opportunities to them.

SEE ALSO:

[Trailhead: Forecast with Precision](#)

EDITIONS


Available in: both Salesforce Classic and Lightning Experience


Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Collaborative Forecasts Concepts

Predict sales revenue and quantities from your opportunity pipeline, and incorporate product families, opportunity splits, and custom opportunity currency fields if needed.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Use Collaborative Forecasts to manage sales expectations and to predict and plan your company's sales cycle from pipeline to closed sales. A forecast is an expression of expected sales revenue based on the gross rollup of a set of opportunities. The forecast amounts on the forecasts page are totals and subtotals of the opportunities in the four forecast categories—Pipeline, Best Case, Commit, and Closed. Depending on how Salesforce is set up, these amounts can reflect opportunities from one or multiple forecast categories. On the forecasts page, roll over the  (Salesforce Classic only) next to the column names to see which forecast categories roll up to the totals in each column. In the rollup table on the forecasts page, forecast amounts are organized by forecast rollup, time period, and optionally by product family. Forecasts can include adjustments made by forecast managers to their immediate subordinates' forecasts and adjustments made by forecast users to their own forecast amounts.

Your admin can enable up to four types of forecasts that you can switch between. Each type of forecast stores its own quota and adjustment data.

Users can view forecast amounts and their related opportunities by forecast rollup for an individual or for everyone below them in the forecast hierarchy. For example, they can see the July Best Case forecast for all the sales managers who report to them, all the sales reps who report to any one of their managers, or just one individual. Users can also adjust their own forecasts and the forecasts of subordinates one level below. The user interface makes all these tasks simple.

- Conduct status calls with an opportunity team.
- Select and view forecasts using an interactive, expandable table.
- See forecast summary information for single months or quarters and a multimonth or quarter range for each forecast rollup.
- If you use product families, see forecast summaries for each product family. (If you're using Lightning Experience, your admin chooses the product families that you can forecast on.)
- If you use opportunity splits, see the split percentages and amounts that contribute to each forecast.
- View and use the list of opportunities related to each forecast amount that you select. Access opportunity details directly from this list.
- Hover over a column boundary and click to adjust the width to view data more easily.
- Make adjustments and view adjustment details, such as the original forecast amount and who made the adjustment. If multiple types of forecasts are enabled, each forecast type maintains separate adjustments.
- If you're a forecast manager, move up and down through the forecasts hierarchy easily.
- View revenue- or quantity-based forecasts.
- View forecasts in multiple currencies.
- View quota information on each user's forecast page. If multiple types of forecasts are enabled, each forecast type maintains separate quota information.
- Use Collaborative Forecasts reports.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

- Include the opportunities of your partner portal users in your forecasts.

SEE ALSO:

[Guidelines for Setting Up Collaborative Forecasts](#)

[What's the difference between Collaborative Forecasts and Customizable Forecasting?](#)

Collaborative Forecasts Elements

Collaborative Forecasts lets you find and communicate opportunity and forecast information easily. If you're using Collaborative Forecasts, make sure that you learn about the elements that comprise a forecast.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Adjustment

A layer of detail that you can add to a forecast amount. An adjustment shows forecast managers' or sales reps' judgment about the final amount that they expect a forecast's opportunities to bring in at the close of the forecast period. Some forecast managers need to adjust their own or a subordinate's forecast. For example, they know that some employees tend to be too optimistic or too conservative when assigning amounts to opportunities. Sales reps can also adjust their own forecasts if they think that opportunity amounts are understated or overstated. Forecast managers can adjust forecasts that include only gross opportunity amounts and forecasts that have adjustments made by someone else in their opportunity team. An adjustment doesn't change the underlying gross rollup amount—it just adds a layer of detail. If multiple types of forecasts are enabled, each forecast type maintains separate adjustments.

Forecast managers can adjust their own Commit and Best Case forecasts and the forecasts of subordinates one level below them in the forecast hierarchy. They can view adjustments that subordinates make at every level below them in the forecast hierarchy. Adjustments made to their subordinates' forecasts roll up into their own forecasts. When you adjust, you can include an explanatory note. Adjustment notes don't appear in reports.

Amount Without Adjustments

The sum of a person's owned revenue opportunities and the person's subordinates' opportunities, without adjustments. Subordinates include everyone reporting up to a person in the forecast hierarchy. This amount is visible only on reports.


Amount Without Manager Adjustments

The forecast number as seen by the forecast owner. This is the sum of the owner's revenue opportunities and the owner's subordinates' opportunities, including adjustments made by the forecast owner on the owner's or subordinates' forecasts. It doesn't include adjustments made by forecast managers above the owner in the forecast hierarchy.

Corporate Currency

The currency in which your corporate headquarters reports revenue and the basis for all currency conversions.

Forecast

An expression of expected sales revenue based on the gross rollup of a set of opportunities. The forecast amounts on the forecasts page are totals and subtotals of the opportunities in the four forecast categories—Pipeline, Best Case, Commit, and Closed. Depending on how Salesforce is set up, these amounts can reflect opportunities from one or multiple forecast categories. On the forecasts page, roll over the  (Salesforce Classic only) next to the column names to see which forecast categories roll up to the totals in each column.

In the rollup table on the forecasts page, forecast amounts are organized by forecast rollup, time period, and optionally by product family. Forecasts can include adjustments made by forecast managers to their immediate subordinates' forecasts and adjustments made by forecast users to their own forecast amounts.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Here you can view forecasts and related opportunities by forecast category for everyone below you in the forecast hierarchy or just one person. For example, you can see the July Best Case forecast for all the sales managers who report to you, all the sales reps who report to any one of your managers, or just one individual.

Forecast Amount

The revenue forecast from the forecast manager's perspective and the sum of the owner's and subordinates' opportunities, including all forecast adjustments.

Forecast Category

The category within the sales cycle to which an opportunity is assigned based on its opportunity stage. The standard forecast categories are Pipeline, Best Case, Commit, Omitted, and Closed. You can customize the forecast category names.

Forecast Currency

Your corporate currency or each forecast owner's personal currency.

Forecast Display Currency

The currency that you select to display forecasts in. The selection must be an enabled currency and is made directly from the forecasts page.

Forecast Hierarchy

A nested, expandable list of forecast users that determines how forecasts roll up within your company and who can view and adjust them. The forecasts hierarchy is based on the role hierarchy and specifies which users are forecast managers. When Collaborative Forecasts is enabled for you, a forecasts hierarchy is generated based on your role hierarchy, but sometimes you need to add or remove managers, sales reps, or other users.

Forecast Owner

A forecast-enabled user who owns opportunities or is a forecast manager in the forecast hierarchy. Forecast managers can have their own opportunities.

Forecast Quantity

The quantity forecast from the forecast manager's perspective and the sum of the owner's and subordinates' opportunities, including all forecast adjustments.

Forecast Range

The date range that you want displayed in your forecast. Depending on your settings, the range can include months or quarters.

Forecast Type

A forecast that's configured to use a specific type of data. You can use the opportunity `Amount` field, opportunity splits, overlay splits, custom opportunity fields, or product families. Each forecast type has its own measurement: revenue or quantity. To use both, enable a separate forecast type for each. Salesforce admins can enable up to four forecast types. You can't use quantity forecasts with opportunity splits or custom opportunity field forecasts.

- Opportunity-quantity forecasts roll up based on the opportunity's `Quantity` field, while opportunity-revenue forecasts roll up based on the opportunity's `Amount` field.
- For opportunity splits-revenue forecasts, the rollup is based on the opportunity's `Amount` field and the split percentage that's assigned to the sales rep.
- For custom opportunity field forecasts, the rollup is based on the custom field amount.
- For product family-revenue forecasts, the rollup is based on the sum of the `Total Price` field for all opportunity line items in that product family.
- Product family-quantity forecasts roll up based on the `Quantity` field for all opportunity line items in that product family.
- For opportunities without opportunity line items or with line items that don't have a specified product family, the totals roll up into the Products Not Categorized row on the forecasts page.

Gross Rollup

An expression of expected sales revenue based on the gross value of a set of opportunities. A forecast always includes a gross rollup amount and can also include adjustments.

Opportunities

The sales and pending deals that you want to track.

Opportunity Splits

Sharing credit across an opportunity team. If your forecast data source is opportunity splits, you can see the split information on the forecasts page.

Opportunity Stage

The current stage of an opportunity, such as Prospect or Proposal. Opportunity stage values correlate with forecast category values to determine how the opportunity contributes to a forecast.

Owner Only Amount

The sum of a person's revenue opportunities, without adjustments.

Owner Only Quantity

The sum of a person's quantity opportunities, without adjustments.

Personal Currency

A user's default currency for quotas, certain forecasting versions, and reports. This currency must be one of your active currencies in Salesforce. Your quota amounts appear in your display currency.

Product Family

A way to categorize your products. For example, if your company sells hardware and software, you can create two product families: Hardware and Software.

Quantity Without Adjustments

The sum of a person's owned quantity opportunities and also his or her subordinates' opportunities, without adjustments. Subordinates include everyone reporting up to a person in the forecast hierarchy.

Quantity Without Manager Adjustments

The forecast number as seen by the forecast owner. This is the sum of the owner's quantity opportunities and subordinates' opportunities, including adjustments made on the subordinates' forecasts. It doesn't include adjustments made by forecast managers above the owner in the forecast hierarchy.

Quota

The monthly or quarterly sales goal that's assigned to a user. A manager's quota equals the amount that the manager and team are expected to generate together. The quota rollup is done manually by users and managers, and revenue or quantity data can be used. If you have multiple types of forecasts enabled, each type maintains separate quota information.

Revenue

The total expected revenue from the opportunities that fit in a given category.

Rollup Table

The table at the top of the forecasts page. The opportunities list at the bottom of the forecasts page corresponds dynamically with selections on the rollup table.

Subordinate


A Collaborative Forecasts user below you in the forecast hierarchy. You can view all your subordinates' forecasts. If you enable adjustments, you can view all your subordinates' adjustment information and adjust the forecasts of subordinates one level below you in the hierarchy. Forecast amounts and adjustments roll up into the forecasts on your forecasts page.

SEE ALSO:

[Collaborative Forecasts Concepts](#)

Monthly and Quarterly Forecast Amounts in Collaborative Forecasts

The Collaborative Forecasts rollup table displays forecast amounts for individual months or quarters and a range of months or quarters, depending on your Collaborative Forecasts settings. Six months or four quarters is the default. Your admin can also enable custom periods.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Depending on your Collaborative Forecasts period settings, you can forecast up to 12 months or eight quarters in the future or past. If your forecast range includes the current month or quarter, the forecasts page displays the current month or quarter. Otherwise, the first month or quarter of the range is selected. Regardless of whether your company uses monthly or quarterly forecasts, forecast managers can use quotas and adjust their subordinates' forecasts. Quota and adjustment periods are based on the period settings.


The forecast date range becomes the default for all Collaborative Forecasts users. Users can use this default or set a different date range display for their own forecasts. After users change their individual forecast date range displays, admins can't override them. However, when changing the *period* display from monthly to quarterly or quarterly to monthly, the change is reflected in all users' forecasts.

SEE ALSO:

- [Change Your Forecast Date Range Display in Collaborative Forecasts](#)
- [Collaborative Forecasts Concepts](#)
- [Define Your Company's Forecast Date Range](#)

Forecast Hierarchy in Collaborative Forecasts

The forecast hierarchy is a nested, expandable list of forecast users that determines how forecasts roll up within your company and who can view and adjust them. The forecasts hierarchy is based on the role hierarchy and specifies which users are forecast managers.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Based on your role, you can be added to or removed from the forecast hierarchy. And your position within the hierarchy can change. For example, some sales reps with no direct reports can view only their own forecasts. However, if they become sales managers, they're added to the forecast hierarchy as forecast managers.

People designated as forecast managers can view the forecasts and opportunities of users, including partner portal users, below them in the forecast hierarchy. Forecast managers can also adjust the forecasts of direct reports. Only managers who adjust and people above them in the hierarchy can view the adjustment.

Not everyone can view the chart that displays your team's forecast hierarchy. If you have questions about your forecast hierarchy, see your admin or forecast manager.

SEE ALSO:

- [Adjusting Forecasts in Collaborative Forecasts](#)
- [Guidelines for Using Collaborative Forecasts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

EDITIONS


Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Partner Portal User Opportunities in Collaborative Forecasts

Partner portal users are external to your Salesforce org but sell your products and services through indirect sales channels. Your partner portal users use a portal to log in to Salesforce. Partners can create opportunities, and users can assign opportunities to them.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Opportunities that a partner portal user creates can roll up to the forecast of the account owner. The account owner must be the person's forecast manager in the forecast hierarchy for the opportunities to roll up into the forecast. For example:

- Gordon Johnson owns a partner account called Acme.
- Gordon has an Acme contact named Anne Smith.
- Anne is a partner portal user.
- Anne reports to Gordon in the forecast hierarchy.

If Anne adds opportunities in her portal, Gordon sees those opportunities in his forecast. Because Gordon is Anne's forecast manager, he can adjust forecast amounts based on her opportunities and see how she's tracking against her quota.


SEE ALSO:

[Guidelines for Viewing Opportunity Details in Collaborative Forecasts](#)

[Partner Portal Overview](#)

View and Edit Forecasts in Collaborative Forecasts

Learn about several basic tasks to help you view and edit forecast information.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Watch a Demo:  [Forecast Accurately with Collaborative Forecasts in Lightning Experience \(English only\)](#)

[Change Your Forecast Date Range Display in Collaborative Forecasts](#)

When your Salesforce admin sets up Collaborative Forecasts, a default forecast date range display is selected. For example, your default can be three months into the future. Use this default or change the date range that's displayed for your own forecast.

[Change Between Forecast Types in Collaborative Forecasts](#)

If you have multiple types of forecasts enabled, select the type to use in your forecasts.

EDITIONS

Available in: Salesforce Classic

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

EDITIONS


Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise, Performance, Unlimited,** and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Change Your Forecast Date Range Display in Collaborative Forecasts

When your Salesforce admin sets up Collaborative Forecasts, a default forecast date range display is selected. For example, your default can be three months into the future. Use this default or change the date range that's displayed for your own forecast.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

The range that you select is relative to the current month or quarter. For example, in January, you select January as your beginning month and April as the ending month. In February, the date range displayed becomes February to May, and so on. Your date range selection remains until you choose another one.

1. Click the **Forecasts** tab.
2. If you're using Lightning Experience, click the gear in the upper right of the forecasts page. If you're using Salesforce Classic, click **Change** in the rollout table.
3. Select a beginning and ending period.
4. Save your changes.

SEE ALSO:

[Monthly and Quarterly Forecast Amounts in Collaborative Forecasts](#)
[Collaborative Forecasts Concepts](#)

Change Between Forecast Types in Collaborative Forecasts

If you have multiple types of forecasts enabled, select the type to use in your forecasts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

[Change Between Forecast Types in Lightning Experience](#)
 Use Lightning Experience to select the forecast type to use.

[Change Between Forecast Types in Salesforce Classic](#)
 Use Salesforce Classic to select the forecast type to use.

SEE ALSO:

[Collaborative Forecasts Elements](#)
[Revenue and Quantity Forecast Measurements in Collaborative Forecasts](#)
[Collaborative Forecasts Concepts](#)
[Guidelines for Using Multiple Currencies in Collaborative Forecasts](#)
[Adjusting Forecasts in Collaborative Forecasts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To use Forecasts:

- Allow Forecasting

To access the forecasts page in Lightning Experience:

- View Roles and Role Hierarchy

EDITIONS


Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Change Between Forecast Types in Lightning Experience

Use Lightning Experience to select the forecast type to use.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. Click the gear in the upper right of the forecasts page.
2. Select a forecast type.
3. If multiple currencies are enabled, select your display currency.

EDITIONS

Available in: Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To use Forecasts:


- Allow Forecasting


To access the forecasts page in Lightning Experience:

- View Roles and Role Hierarchy

Change Between Forecast Types in Salesforce Classic

Use Salesforce Classic to select the forecast type to use.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. Click  next to the forecast name in currency type or units.
2. Select **Revenue** or **Quantity (Units)**.
3. If you select **Revenue** and multiple currencies are enabled, select your display currency. Under Currency, click **Change currency**.

Manage Forecast Types in Collaborative Forecasts

Learn about the forecast types available.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Watch a Demo:  [Forecast Accurately with Collaborative Forecasts in Lightning Experience \(English only\)](#)

[Revenue and Quantity Forecast Measurements in Collaborative Forecasts](#)

Calculate forecasts on revenue or quantity.

[Custom Opportunity Field Forecasts in Collaborative Forecasts](#)

Track and predict revenue beyond the standard opportunity Amount field.

[Overlay Splits Forecasts in Collaborative Forecasts](#)

Track revenue from sales team members who help close opportunities but aren't directly responsible for them.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To use Forecasts:

- Allow Forecasting

To access the forecasts page in Lightning Experience:

- View Roles and Role Hierarchy

EDITIONS


Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Revenue and Quantity Forecast Measurements in Collaborative Forecasts

Calculate forecasts on revenue or quantity.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

- Opportunity-quantity forecasts roll up based on the opportunity's `Quantity` field, while opportunity-revenue forecasts roll up based on the opportunity's `Amount` field.
- For opportunity splits-revenue forecasts, the rollup is based on the opportunity's `Amount` field and the split percentage that's assigned to the sales rep.
- For custom opportunity field forecasts, the rollup is based on the custom field amount.
- For product family-revenue forecasts, the rollup is based on the sum of the `Total Price` field for all opportunity line items in that product family.
- Product family-quantity forecasts roll up based on the `Quantity` field for all opportunity line items in that product family.
- For opportunities without opportunity line items or with line items that don't have a specified product family, the totals roll up into the Products Not Categorized row on the forecasts page.

For example:

- A sales manager needs to forecast using revenue because the sales vice president sets quota amounts based on the US dollar.
- A sales rep needs to forecast using quantity because of an incentive to sell 10,000 units of a promotional product.

If you want to forecast revenue and quantity for the same data source, such as opportunities or product families, your Salesforce admin can create a forecast type for each, and you can toggle between them on the forecasts page.

SEE ALSO:

[Change Between Forecast Types in Collaborative Forecasts](#)

[Collaborative Forecasts Concepts](#)

[Guidelines for Using Multiple Currencies in Collaborative Forecasts](#)

[Adjusting Forecasts in Collaborative Forecasts](#)


Custom Opportunity Field Forecasts in Collaborative Forecasts

Track and predict revenue beyond the standard opportunity `Amount` field.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

You can forecast on custom currency fields on opportunities. For example, your sales team can use a custom field such as `Margin`, `Monthly Recurring Revenue`, `Annual Contract Value`, or any other currency field that your company requires. Your Salesforce admin can set up forecasts based on a custom field, which sales managers can then view on the forecasts page.

If you use opportunity splits with your custom field, your forecast incorporates those splits. You can use a custom field forecast by itself or with other forecasts, such as an opportunity-revenue forecast based on the opportunity `Amount` field. Your admin can also set up a forecast for the standard `Expected Revenue` field.

 **Note:** If forecast managers or sales reps viewing the forecast can't access the custom opportunity field, they can see forecast amounts but not the custom field values in the opportunity list.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud


EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Example: A Custom Field Forecast with an Opportunity Split

Here we see an opportunity owned by sales rep Anna Bressan and split with a coworker on another team. Anna has many multiyear deals, so the revenue received from a deal each year is tracked in a custom `Annual Contract Value` field. In this case, Anna's split is 25% of the total `Annual Contract Value` forecast amount.


 **Acme - Premium Support**

Discounted Amount ⓘ
250000

Annual Contract Value
125000

Here we see Anna's split amount rolled up into the `Annual Contract Value` forecast of her manager, Bryce.

MONTHS		COMMIT FORECAST	BEST CASE FORECAST
Total: 3 Months		USD 17,133,760.88	USD 23,219,440.88
>	October FY 2017	USD 3,971,440.17	USD 10,005,440.17
>	November FY 2017	USD 8,074,000.00	USD 8,105,680.00
>	December FY 2017	USD 5,088,320.71	USD 5,108,320.71
Bryce Knell Team · Total: 3 Months · All Forecast Categories			
OPPORTUNITY NAME	ACCOUNT NAME	FORECASTED AMOUNT	SPLIT
Acme - Premium Supp...	Acme Inc.	USD 31,250.00	25.00%


 **Note:** To enable a custom field forecast, your Salesforce admin must enable opportunity splits for the custom field. However, the opportunity owner automatically receives a 100% split for the field, so if your company doesn't plan to use splits with the field, the rollup is the same as if there were no splits.

Forecasts from the Standard Expected Revenue Field

The standard `Expected Revenue` field is useful for opportunities that are likely to produce more or less revenue than indicated in the `Amount` field. If you use the `Expected Revenue` field, your admin can set up a forecast for it. The `Expected Revenue` forecast then appears in the dropdown list in the same way as a custom field forecast.

Overlay Splits Forecasts in Collaborative Forecasts

Track revenue from sales team members who help close opportunities but aren't directly responsible for them.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

As a sales manager, you probably use revenue splits for crediting team members who are directly responsible for opportunities. To provide more flexibility with how you assign credit for opportunities, you can use overlay splits, which help you and other team members allocate credit to overlay sales roles for working on opportunities. Overlay splits can add up to any percentage of the opportunity amount, sometimes exceeding 100%. For example, your sales team can include sales engineers, product specialists, or partners who help close deals but aren't directly responsible for them.

Overlay forecasts let you predict revenue from overlay splits. Forecast amounts roll up through the role hierarchy based on the opportunity's `Amount` field and the overlay team member's split percentage.

Let's say a sales rep, Allison, has an opportunity that includes an overlay split of 50% for sales engineer Owen, who's working with Allison to close the deal. For Allison, the opportunity `Amount` field rolls up into her opportunity revenue forecast.

Allison's manager Bryce can view the overlay forecast along with all the other opportunities that his sales engineer team is working on. Bryce can see that Allison is receiving a 100% credit for her deal, which contributes to Allison's open pipeline total and Bryce's open pipeline total. If Bryce thinks the deal will close for a higher amount, he can adjust the open pipeline forecast amount.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

MONTHS	CLOSED ONLY	COMMIT FORECAST	BEST CASE FORECAST	OPEN PIPELINE
Total: 3 Months	USD 2,496,600.00	USD 17,333,760.88	USD 23,419,440.88	USD 56,075,038.50
October FY 2017	USD 255,000.00	USD 3,971,440.17	USD 10,005,440.17	USD 23,377,890.17
Alan Wong →	USD 245,000.00	USD 3,355,000.00	USD 3,795,000.00	USD 12,762,250.00
Allison Wh... →	USD 0.00	USD 0.00	USD 0.00	USD 191,000.00
Brent Bassi →	USD 0.00	USD 606,440.17	USD 650,440.17	USD 650,440.17
Noah Lark... →	USD 0.00	USD 0.00	USD 5,550,000.00	USD 8,569,700.00

Bryce Knell Team · Total: 3 Months · All Forecast Categories						
OPPORTUNITY NAME	ACCOUNT NAME	FORECASTED AMOUNT	SPLIT	CLOSE DATE	STAGE	PROBABILITY (%)
ABC - 10 Laptops	ABC Labs	USD 5,000.00	100.00%	10/13/2017	Needs Analysis	100%
ABC Labs - 9 Spider 2 ...	ABC Labs	USD 3,650,000.00	100.00%	10/25/2017	Needs Analysis	20%
Acme - 600 Desktops	Acme Inc.	USD 445,115.17	100.00%	10/06/2017	Negotiation/Review	90%
Acme - Premium Supp...	Acme Inc.	USD 250,000.00	100.00%	10/13/2017	Negotiation/Review	90%

Manage Forecast Adjustments in Collaborative Forecasts

Collaborative Forecasts users who anticipate differences between the current forecast and actual future results can change forecast rollup amounts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Watch a Demo:  [Forecast Accurately with Collaborative Forecasts in Lightning Experience \(English only\)](#)

[Adjusting Forecasts in Collaborative Forecasts](#)

Add adjustments to the Best Case and Commit forecast amounts. Then change or remove adjustments as needed.

[Adjust Forecasts in Collaborative Forecasts](#)

To add an adjustment to a Best Case or Commit forecast amount, click its cell in the forecast table, and then enter the new amount.

[View and Edit Forecast Adjustments in Collaborative Forecasts](#)

View details about forecast adjustments, including who made the adjustments, the adjusted amounts, and the original gross rollup (the forecast amount before adjustments). Edit adjustments that you've made as needed.

[Adjustments Purges in Collaborative Forecasts](#)

Adjustments can be purged when you change some forecast and custom fiscal year settings. The data on which the forecasts are based remains untouched.

Adjusting Forecasts in Collaborative Forecasts

Add adjustments to the Best Case and Commit forecast amounts. Then change or remove adjustments as needed.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

To adjust forecasts, adjustments must be enabled. Your Salesforce admin can enable managers to adjust subordinates' forecasts, all Collaborative Forecasts users to adjust their own forecasts, or both.

An adjustment shows forecast managers' or sales reps' judgment about the final amount that they expect a forecast's opportunities to bring in at the close of the forecast period. Some forecast managers need to adjust their own or a subordinate's forecast. For example, they know that some employees tend to be too optimistic or too conservative when assigning amounts to opportunities. Sales reps can also adjust their own forecasts if they think that opportunity amounts are understated or overstated. Forecast managers can adjust forecasts that include only gross opportunity amounts and forecasts that have adjustments made by someone else in their opportunity team. An adjustment doesn't change the underlying gross rollup amount—it just adds a layer of detail. If multiple types of forecasts are enabled, each forecast type maintains separate adjustments.

Forecast managers can adjust their own Commit and Best Case forecasts and the forecasts of subordinates one level below them in the forecast hierarchy. They can view adjustments that subordinates make at every level below them in the forecast hierarchy. Adjustments made to their subordinates' forecasts roll up into their own forecasts. When you adjust, you can include an explanatory note. Adjustment notes don't appear in reports.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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For example, let's say you're a sales manager who's adjusted the forecast of one of your sales reps down from \$2,000 to \$1,500. Your vice president, who's your forecast manager, sees \$1,500 when viewing your forecast, along with an icon indicating that the amount contains an adjustment. The vice president can decide to adjust it back to \$2,000.

Forecast managers' own forecasts pages show all their forecast amounts and related opportunity details. When managers view a subordinate's forecasts page, they see the totals that the subordinate sees. Any adjustments that the managers make to subordinates' amounts from their own forecast page don't appear on the subordinate's forecasts page. Instead, the managers see that subordinate's forecasts and any adjustments that the subordinates made to their own amounts or amounts of their subordinates. For example, let's say you're a vice president of sales. On your own forecasts page, you see a July Best Case forecast of \$1,250 (including a \$50 adjustment that you made) for one of your first-level subordinates, a sales manager. However, when you view the sales manager's forecasts page, the July Best Case forecast is \$1,200, because it doesn't include your adjustment. If a manager and a subordinate adjust the same forecast amount, only the manager's adjustment rolls up the forecast hierarchy.

If multiple types of forecasts are enabled, each forecast type maintains separate adjustments. For example, if opportunity-revenue and opportunity-quantity forecasts are enabled, you can adjust forecast amounts in each of those forecasts. However, adjustments made in the opportunity-revenue-based forecast aren't displayed as adjustments in any other forecast type. So if you adjust an amount in the opportunity-revenue forecast from \$100,000 to \$90,000 and then switch your forecast view, you don't see an equivalent adjustment value in the opportunity-quantity forecast. If you change the forecast view back to the opportunity-revenue forecast, you see your adjustment of \$90,000. If you use product family forecasts, you can't adjust your own product family forecast amounts in Salesforce Classic. If users adjust their product family forecasts in Lightning Experience, not every total in the Salesforce Classic forecasts grid reflects the adjustments.

When an opportunity moves from one forecast category to another, such as from Pipeline to Best Case, the unadjusted raw amounts change for each of those rollups. However, forecast amounts with adjustments don't change in the rollup table on the forecasts page. We recommend updating or removing your adjustments to each forecast rollup to account for changes in the stage of opportunities.

 **Note:** While you're viewing a forecasts page, your subordinates can be adjusting forecast amounts or editing related opportunities. Or you can adjust one of your subordinates' forecasts from your own page. All these events change forecast amounts. Click **Refresh** to view the most recent forecast amounts.

This table shows who can view and adjust your forecasts.


User	Can view your forecasts?	Can adjust your forecasts?
Your manager's manager	Yes	No
Your manager	Yes	Yes. The manager adjusts amounts from his or her own forecasts page.
You	Yes	Yes, if enabled by your admin. You can adjust forecast totals only, not the subtotal for My Opportunities.
Your direct report	No	No
Your subordinate who's not a direct report	No	No







This table shows whose forecasts you can view and adjust.

User	Can you view forecasts?	Can you adjust forecasts?
Your manager's manager	No	No

User	Can you view forecasts?	Can you adjust forecasts?
Your manager	No	No
You	Yes	Yes, if enabled by your Salesforce admin
Your direct report	Yes. However, if you select a direct subordinate's forecast, you see the same view as that subordinate, so your adjustments aren't visible.	Yes. You adjust these amounts from your own forecasts page.
Your subordinate who's not a direct report	Yes. You see the same view that the subordinate sees.	No. Your direct reports can adjust their own direct reports' forecasts.

If a forecast contains an adjustment:

- In Lightning Experience, you see the  icon next to the forecast amount.
- In Salesforce Classic, you see these icons next to the forecast amount.

Icon in Salesforce Classic	Definition
	You adjusted the forecast amount. You see this indicator only on your forecasts page.
	One of your subordinates adjusted the forecast. You see this indicator on your forecasts page and your subordinates' forecasts pages.
	You and one or more subordinates adjusted the forecast. You see this indicator only on your forecasts page, because when you drill down to a subordinate's page, you see the page as that user sees it.
	Save your adjustment.
	Undo your adjustment and restore the previous value of the forecast. Hover over the button to see a tool tip that tells you if the previous value includes an adjustment.
	The adjustment includes a note.
remove	Remove your adjustment and restore the previous value, which can include someone else's adjustment.

SEE ALSO:

[Adjust Forecasts in Collaborative Forecasts](#)

[View and Edit Forecast Adjustments in Collaborative Forecasts](#)


[Adjustments Purges in Collaborative Forecasts](#)

[Change Between Forecast Types in Collaborative Forecasts](#)


[Guidelines for Refreshing Forecasts in Collaborative Forecasts](#)

Adjust Forecasts in Collaborative Forecasts

To add an adjustment to a Best Case or Commit forecast amount, click its cell in the forecast table, and then enter the new amount.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

To adjust forecasts, adjustments must be enabled. Your Salesforce admin can enable managers to adjust subordinates' forecasts, all Collaborative Forecasts users to adjust their own forecasts, or both.

1. Find the forecast that you want to adjust, and then hover over its cell and click .
2. Enter your adjustment.
3. To include information about why you made the adjustment, add a note (140 characters maximum).
4. Save your changes. An icon appears in the cell to show that you adjusted the forecast. The adjustment rolls up to the period range total rows on the page.

SEE ALSO:

- [Adjusting Forecasts in Collaborative Forecasts](#)
- [View and Edit Forecast Adjustments in Collaborative Forecasts](#)
- [Adjustments Purges in Collaborative Forecasts](#)
- [Change Between Forecast Types in Collaborative Forecasts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To use Forecasts:

- Allow Forecasting

To access the forecasts page in Lightning Experience:


- View Roles and Role Hierarchy



To adjust Forecasts:

- Override Forecasts

View and Edit Forecast Adjustments in Collaborative Forecasts

View details about forecast adjustments, including who made the adjustments, the adjusted amounts, and the original gross rollup (the forecast amount before adjustments). Edit adjustments that you've made as needed.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. Find the adjusted forecast that you want to view or edit. (An indicator appears next to the adjusted forecast amount.)
2. To view the adjustment details, do one of the following.
 - If you're using Lightning Experience, click .
 - If you're using Salesforce Classic, hover over the forecast's cell.
3. Click  to edit or remove any adjustments that you made.


SEE ALSO:

[Adjusting Forecasts in Collaborative Forecasts](#)

[Adjust Forecasts in Collaborative Forecasts](#)

Adjustments Purges in Collaborative Forecasts

Adjustments can be purged when you change some forecast and custom fiscal year settings. The data on which the forecasts are based remains untouched.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Adjustment purges happen when your Salesforce admin does any of the following.

- Disables Collaborative Forecasts.
- Disables manager adjustments. Only adjustments made by forecast managers to their subordinates' forecasts are purged.
- Disables owner adjustments. Only adjustments made by forecast users to their own forecasts are purged.
- Changes your forecast period setting from quarterly to monthly or from monthly to quarterly.
- Disables a forecast type. Only adjustments for that forecast type are purged.
- Changes the start month of your fiscal year when the forecast period is set to quarterly. Quotas and adjustments are purged.
- Deletes a product family. Quotas and adjustments are purged for the deleted product family.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To use Forecasts:

- Allow Forecasting

To access the forecasts page in Lightning Experience:

- View Roles and Role Hierarchy

To adjust Forecasts:

- Override Forecasts

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

- Switches from cumulative forecast rollups to individual forecast category rollups or from individual to cumulative rollups.
- Creates a custom fiscal year for the first time. All adjustments and quotas for the corresponding and following standard fiscal years are purged.
- Deletes a custom fiscal period or quarter. Forecast adjustments and quotas for that period or quarter are also deleted.

Adjustment purges also happen when either of the following is true.

- You're no longer a forecast manager. Only adjustments that you made to subordinates' forecast amounts are purged.
- You're removed from a role that's set as a forecast manager in the forecast hierarchy. Only adjustments that you made to subordinates' forecast amounts are purged.


SEE ALSO:

[Adjusting Forecasts in Collaborative Forecasts](#)

[Adjust Forecasts in Collaborative Forecasts](#)

Manage Your Quotas in Collaborative Forecasts

A forecast quota is the monthly or quarterly sales goal that's assigned to a sales team member. A manager's quota equals the amount that the manager and team are expected to generate together. The quota rollup is done manually by users and managers, and revenue or quantity data can be used. If you have multiple types of forecasts enabled, each type maintains separate quota information.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

Watch a Demo:  [Forecast Accurately with Collaborative Forecasts in Lightning Experience \(English only\)](#)

If forecast quotas are enabled, quota data appears in these locations on the forecasts page.

- A column that contains quota amounts for a specific period. If your forecast includes product families, this column includes quotas for each product family.
- A row that contains the percentage amounts attained for a specific period in a specific forecast rollup.

[Show and Hide Quota Information in Collaborative Forecasts](#)

Show and hide quota data so that your forecasts page looks the way you want it to look.

EDITIONS


Available in: both Salesforce Classic and Lightning Experience

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

Available in: **Professional** Edition with the "API Enabled" permission

Show and Hide Quota Information in Collaborative Forecasts

Show and hide quota data so that your forecasts page looks the way you want it to look.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

1. Do one of the following.
 - a. If you're using Lightning Experience, click the gear in the upper right of the forecasts page.
 - b. If you're using Salesforce Classic, click **Display Options**.
2. To show your quota amount for each period, select **Show Quota Column**.
3. To show your quota attainment for a specific rollup in a selected period, select **Show Quota % Attainment**. The percentage shown below each forecast amount indicates the proportion of the user's quota that the amount represents.

The quota information displayed can be revenue or quantity amounts, depending on the type of forecast that you're using. If multiple types of forecasts are enabled, each forecast type maintains separate quota information. To hide quota information, deselect these options.

SEE ALSO:

[Considerations for Using Quotas in Collaborative Forecasts](#)

[Enable Quotas in Collaborative Forecasts](#)

Things to Know About Collaborative Forecasts

Review considerations, guidelines, and limitations for using Collaborative Forecasts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

[Considerations for Migrating from Customizable Forecasting to Collaborative Forecasts](#)

Before you migrate from Customizable Forecasting to Collaborative Forecasts, consider a few key points.

[Guidelines for Setting Up Collaborative Forecasts](#)

Review key guidelines for setting up Collaborative Forecasts.

[Considerations for Defining Forecasts Settings in Collaborative Forecasts](#)

Before you define forecasts settings, review a few key points.

[Guidelines for Displaying Fields in the Opportunity List in Collaborative Forecasts](#)

Refer to key guidelines when you're displaying fields in the opportunity list.

[Considerations for Disabling Collaborative Forecasts](#)

Before you disable Collaborative Forecasts, find out how data is affected.

[Guidelines for Using Collaborative Forecasts](#)

Review key guidelines to make sure that you get the most out of Collaborative Forecasts.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Available in: **Professional** Edition with the "API Enabled" permission

USER PERMISSIONS

To use quotas:

- Allow Forecasting AND Manage Quotas

To access the forecasts page in Lightning Experience:

- View Roles and Role Hierarchy

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise, Performance, Unlimited,** and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

[Guidelines for Using Multiple Currencies in Collaborative Forecasts](#)

If your company uses forecasts and multiple currencies, your Salesforce admin chooses a forecast currency and enables forecast types. The forecast currency is your corporate currency or each forecast owner's personal currency.

[Guidelines for Using Collaborative Forecasts Reports](#)

When using Collaborative Forecasts, review guidelines for how to get the most from forecasting reports.

[Guidelines for Viewing Opportunity Details in Collaborative Forecasts](#)

From your forecasts detail page or any subordinate's forecasts detail page, you can view the opportunities that make up a forecast: for a month or month range, for all your subordinates, or just one.

[Guidelines for Refreshing Forecasts in Collaborative Forecasts](#)

Certain actions can change forecast amounts. For example, while you're viewing a forecasts page, your subordinates can edit related opportunities and adjust the forecasts of their own subordinates. And you can adjust one of your subordinates' forecasts from your own page. To see these changes, refresh the forecasts page.

[Considerations for Using Quotas in Collaborative Forecasts](#)

Before you use forecast quotas, review some considerations.

[Forecasts FAQ](#)

Get answers to your questions about forecasting.

Considerations for Migrating from Customizable Forecasting to Collaborative Forecasts

USER PERMISSIONS

To view Forecasts setup:	View Setup and Configuration
To edit Forecasts settings:	Customize Application
To enable Forecasts users:	Manage Internal Users AND Customize Application
To manage quotas:	Customize Application AND Manage Quotas
To upload quota data to Salesforce:	Manage Quotas AND View All Forecasts

EDITIONS

Collaborative Forecasts is available in: both Salesforce Classic and Lightning Experience

Collaborative Forecasts is available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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

Before you migrate from Customizable Forecasting to Collaborative Forecasts, consider a few key points.

- To enable Collaborative Forecasts, Customizable Forecasting must be disabled. Contact Salesforce for assistance with disabling Customizable Forecasting.
- When you turn off Customizable Forecasting, the Quotas related list no longer appears on User records. The Edit Personal Quota permission (API name: `PermissionsEditOwnQuota`) also no longer appears in the Profile object.

- If you have the original Territory Management feature enabled, disable Customizable Forecasting and original Territory Management before migrating to Collaborative Forecasts. To disable these features, contact Salesforce. You can enable and use Enterprise Territory Management and Collaborative Forecasts at the same time, but the two features aren't integrated to work together.
- When you migrate, the forecast history, overrides, reports, and sharing data from Customizable Forecasting are purged.
- Consider exporting forecasting report data so that you have a backup.
- Monthly forecasts is the default Collaborative Forecasts period. You can change your settings to quarterly. If you use custom fiscal years, your fiscal period is the default. You can also choose your custom quarters.
- The forecast hierarchy is retained. However, to reduce the risk of data loss, consider migrating to Collaborative Forecasts immediately after disabling Customizable Forecasts. After migrating, don't enable Forecasts users again. Validate all hierarchies for accuracy.
- Before migrating, make sure to review [What's the difference between Collaborative Forecasts and Customizable Forecasting?](#) to determine whether you can benefit from the latest improvements offered in Collaborative Forecasts.


SEE ALSO:

[What's the difference between Collaborative Forecasts and Customizable Forecasting?](#)

Guidelines for Setting Up Collaborative Forecasts

Review key guidelines for setting up Collaborative Forecasts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

 **Important:** Don't disable the new user interface theme in Salesforce Classic or enable original [Territory Management](#). You can enable Enterprise Territory Management, but forecast rollups are based on the role hierarchy and not the territory hierarchy.

- [Enable one to four forecast types](#).
- Select the fields that appear in the opportunity pane for each forecast type.
- If your sales team uses quotas, [enable quotas](#).
- If your sales team adjusts forecasts, [enable forecasts adjustments](#).
- [Choose whether to use individual forecast category rollups](#) or [enable cumulative forecast rollups](#).
- [Define your forecast range](#). You can select the time period and default range. Standard and custom fiscal years are supported.
- If your company uses specific terminology, [customize your forecast categories](#).
- If your company uses multiple currencies, set a [forecast currency](#)—your company's corporate currency or the forecast owner's personal currency.
- [Enable users](#) who need forecasts.
- [Set up your forecasts hierarchy](#) to determine how forecasts roll up within your company and who can view and adjust them. The forecasts hierarchy is based on the role hierarchy and specifies which users are forecast managers.
- Make sure that your Collaborative Forecasts users can [access the forecasts page](#).

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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

- For best viewing results, keep the Tab Bar Organizer enabled.

SEE ALSO:

[Collaborative Forecasts Concepts](#)

[Define Forecasts Settings in Collaborative Forecasts](#)

[Considerations for Disabling Collaborative Forecasts](#)

[Considerations for Migrating from Customizable Forecasting to Collaborative Forecasts](#)

Considerations for Defining Forecasts Settings in Collaborative Forecasts

Before you define forecasts settings, review a few key points.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

- If you're using Lightning Experience and you choose to forecast on product families, keep in mind that the more product families you choose, the more rows appear in the forecasts grid. The forecasts grid shows up to 2,000 rows.
- Salesforce recommends that you review the documentation before setting up Collaborative Forecasts. If you change certain settings, you can lose data.
- For a more detailed step-by-step explanation of setting up Collaborative Forecasts and why you'd enable certain functionality, see the [Collaborative Forecasts Implementation Guide](#).
- If you disable adjustments, adjustment data is purged.
- If you change your forecast period, quota data and adjustment data are purged.
- If you remove a forecast type, quota data and adjustment data are purged for that forecast type.
- If you change the forecast measurement for a forecast type from revenue to quantity or from quantity to revenue, quota data and adjustment data are purged for that forecast type.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Guidelines for Displaying Fields in the Opportunity List in Collaborative Forecasts

Refer to key guidelines when you're displaying fields in the opportunity list.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

- If you add an opportunity field to the opportunity pane, and the field isn't visible to Collaborative Forecasts users, check the field-level security setting for the specific user profile and field. If the forecast is based on that field, the Forecasted Amount column shows the value of the field or the value of the field's split that contributes to the forecast, regardless of field-level security.
- When a rep selects a forecast amount in the rollup table, the list of opportunities that roll up to that amount appears below the table. Select up to 15 standard and custom fields that appear in the opportunity pane for each enabled forecast type. Your sales team sees the selected fields based on their field-level security settings. `Opportunity Name` is a required field. We recommend adding `Forecast Category` to the pane.
- When selecting fields, consider the fields that are used in the forecast rollup.
 - Opportunity-quantity forecasts roll up based on the opportunity's `Quantity` field, while opportunity-revenue forecasts roll up based on the opportunity's `Amount` field.
 - For opportunity splits-revenue forecasts, the rollup is based on the opportunity's `Amount` field and the split percentage that's assigned to the sales rep.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud


- For custom opportunity field forecasts, the rollup is based on the custom field amount.
- For product family-revenue forecasts, the rollup is based on the sum of the `Total Price` field for all opportunity line items in that product family.
- Product family-quantity forecasts roll up based on the `Quantity` field for all opportunity line items in that product family.
- For opportunities without opportunity line items or with line items that don't have a specified product family, the totals roll up into the Products Not Categorized row on the forecasts page.


Depending on whether your forecast type uses the revenue or quantity measurement, consider adding `Amount` or `Quantity` to the pane.

- If your forecast data source is opportunities or product families, the `Amount` field appears by default. If your data source is opportunity splits, the `Forecasted Amount` and `Split %` fields appear by default. You can change the selected fields for each forecast type even after it has been enabled.

Considerations for Disabling Collaborative Forecasts

Before you disable Collaborative Forecasts, find out how data is affected.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

 **Warning:** Disabling certain functionality can result in purged quota and adjustment data, so consider exporting your data before disabling anything. When you complete your setting changes, you can import the data back into Salesforce. If you change your time period from monthly to quarterly or from quarterly to monthly, you *can't* import your quota or adjustments data back into Salesforce, because the existing values don't align with your new periods.

If you disable...	These items are purged...
Collaborative Forecasts	Adjustments (your forecast hierarchy stays in place)
A forecast type	Quotas and adjustments for that forecast type
Adjustments	Adjustments
The monthly period setting to use quarterly periods OR The quarterly period setting to use monthly periods	Quotas and adjustments

To disable Collaborative Forecasts, contact Salesforce.

When adjustments are purged from forecasts, the underlying data on which the forecasts are based isn't affected.

SEE ALSO:

[Collaborative Forecasts Concepts](#)

[Define Forecasts Settings in Collaborative Forecasts](#)

EDITIONS


Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Guidelines for Using Collaborative Forecasts

Review key guidelines to make sure that you get the most out of Collaborative Forecasts.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

General Guidelines

- Track important details at the opportunity level.
- Measure everything related to potential deals—activities such as emails, meetings, and outreach—to determine their contributions to revenue.
- Create actionable tasks with next steps and completion dates pertaining to opportunities.
- Map your sales stages to forecast categories. Adjust close probability based on historical data to increase your forecast accuracy.
- When adjusting forecasts, have conversations with your subordinates so that they understand your expectations.
- Because opportunities can change frequently, revisit forecast adjustments weekly to avoid out-of-date adjustments.
- To ensure that the forecast visibility rolls up to every level of the hierarchy, designate each sales manager with subordinates as a forecast manager in your forecast hierarchy.
- Customize your forecast category names to match your business process and terminology.

Navigating Forecast Information

- Forecast users can jump to the forecasts of users they have access to view. Begin typing a name in the Role Hierarchy (Lightning Experience) or “Jump to” (Salesforce Classic) text box, and then select the name.
- To expand a row on the forecasts page, click it.
- Hover over a name to display the **Details** link. Navigation links with the names of forecast managers appear at the top of the page as you drill down through the forecast hierarchy. Click these links to quickly move through the hierarchy.

Viewing Forecast Information

- Keep your window sized to 1,024 pixels or greater.
- Because of the format and amount of information in the forecast rollup table, working with forecasts in mobile browsers can be difficult.
- If you have multiple forecast types enabled, select which of them to view by clicking the name of the forecast in the gear (Lightning Experience) or upper-right dropdown list (Salesforce Classic) on the forecasts page and then choosing a different type from the menu.
- Run reports to analyze trends and check performance.
- Create dashboards for metrics of all activities related to potential sales.

Collaborating with Chatter

- Use Chatter to share opportunity and forecast information with your team and bring attention to important details.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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- If Chatter is enabled and you're a forecast manager, hover over a subordinate's name and click **Chat Now** to display Chatter options such as Follow or Send a message.


SEE ALSO:

[Collaborative Forecasts Concepts](#)

[Guidelines for Using Collaborative Forecasts Reports](#)

Guidelines for Using Multiple Currencies in Collaborative Forecasts

If your company uses forecasts and multiple currencies, your Salesforce admin chooses a forecast currency and enables forecast types. The forecast currency is your corporate currency or each forecast owner's personal currency.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

- When you use Collaborative Forecasts, you select a *display currency*, which can be any currency that's enabled in Salesforce. To change the currency, select a different currency from the gear (Lightning Experience) or the dropdown list (Salesforce Classic) in the upper right of the forecasts page.
- If you use revenue-based forecasts, when currency rates change, opportunities and adjustments roll up with the changed value along with values in the forecast table.
- If you use quantity-based forecasts, when currency rates change, opportunities and adjustments roll up with the changed value.
- The processing indicator (🕒) appears as changed values roll up (Salesforce Classic only).
- Rate changes impact all forecast periods (historical, current, and future).
- Deactivating a currency that's set as a user's personal currency resets the user's currency to the corporate currency.
- To edit your personal currency settings, edit your personal information.

SEE ALSO:

[Adjusting Forecasts in Collaborative Forecasts](#)

[Collaborative Forecasts Elements](#)

[Change Between Forecast Types in Collaborative Forecasts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Guidelines for Using Collaborative Forecasts Reports

When using Collaborative Forecasts, review guidelines for how to get the most from forecasting reports.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

- To determine whether forecasting reports are available, go to the Reports tab, and then click **New Report**. Select the folder in which your Salesforce admin has placed the forecasting report types. If you don't see the fields or report type names described in this table, check with your admin.
- If reports that use a specific forecast type don't run, that forecast type was likely deleted. Check with your admin.
- Reports contain the latest information at the time when you run the report. If changes are in progress while the report is running, you might see a difference between your report amounts and the forecasts page.
- The data that you see in reports depends on what you can view in Collaborative Forecasts. For example, forecast managers can view adjustments, but someone who's not a forecast manager running a similar report doesn't see the adjusted amounts in reports. A forecast amount can consist of a rollup of many users' forecast amounts, so examine report results closely when using summary fields.

Report Element	How to See It
A forecast summary from a specific user's perspective.	Create a Forecasting Item report and add a filter using Owner: Full Name. Filter by a specific person's name.
The sum of a person's revenue opportunities, without adjustments.	Add Owner Only Amount to your Forecasting Item report. For example, if you own two opportunities, each worth \$10,000, the Owner Only Amount is \$20,000. To view the same information for quantity, add Owner Only Quantity to the report.
The sum of a person's owned revenue opportunities and the person's subordinates' opportunities, without adjustments. Subordinates include everyone reporting up to a person in the forecast hierarchy. This amount is visible only on reports.	Add Amount Without Adjustments to your Forecasting Item report. For example, if the sum of the amount of all opportunities owned by you is \$20,000, and the sum of the amount of your subordinates' opportunities is \$55,000, the Amount Without Adjustments is \$75,000. To view the same information for quantity, add Quantity Without Adjustments to the report.
The forecast number as seen by the forecast owner. This is the sum of the owner's revenue opportunities and the owner's subordinates' opportunities, including adjustments made by the forecast owner on the owner's or subordinates' forecasts. It doesn't include	Add Amount Without Manager Adjustments to your Forecasting Item report. For example, Anne has an Amount Without Adjustments of \$75,000, made up of \$20,000 of her own opportunities and \$55,000 of opportunities owned by Ben, her subordinate. She adjusts Ben's amount to \$65,000 for a total of \$85,000. If you adjust

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USER PERMISSIONS

To use Forecasts:

- Allow Forecasting

To access the forecasts page in Lightning Experience:

- View Roles and Role Hierarchy

To view the Reports tab:

- Run Reports

To create, edit, and delete reports:

- Create and Customize Reports

AND

Report Builder

Report Element**How to See It**

adjustments made by forecast managers above the owner in the forecast hierarchy.

Anne's number from \$85,000 to \$100,000, you see \$85,000 in Amount Without Manager Adjustments, because Anne sees this amount (and Anne can't see your adjustments because you're her manager). To see the amount that includes your adjustment to \$100,000, look at Forecast Amount. To view the same information for quantity, add Quantity Without Manager Adjustments to the report.

The revenue forecast from the forecast manager's perspective and the sum of the owner's and subordinates' opportunities, including all forecast adjustments.

Add Forecast Amount to your Forecasting Item report. For example, you're a forecast manager and have another forecast manager reporting to you who has an Amount Without Manager Adjustment totaling \$85,000. If you adjust the forecast to \$100,000, the Forecast Amount is \$100,000. To view the same information for quantity, add Forecast Quantity to the report.

Whose forecast amounts have adjustments made to them.

Add Has Adjustment to your Forecasting Item report. For example, if you make a manager adjustment to one of your subordinate's forecast amounts, this checkbox is selected. If your subordinate adjusts one of his or her subordinate's amounts, this checkbox is selected. However, unless you have the "View All Data" permission, if your forecast manager adjusts your forecast amount, this checkbox remains deselected. You don't have access to your forecast manager's adjustment information. Also add Has Owner Adjustment. If a forecast user adjusts his or her own forecast, this checkbox is selected.

Quota detail for your forecasts.

Create a Forecasting Quotas report. For example, depending on how your Salesforce admin set up the report type, you can include fields, such as the full name of the quota owner. Then you can filter by your own name to see quotas that you created and their related accounts and owners.

How forecast amounts today compare with earlier forecast amounts.

[Create a Forecasts with Historical Trending report](#), and then compare the value of the Forecast Amount field at the beginning of the month with its value at the end of the month, sorted by owner.

Results for your direct reports only.

When creating a forecasting report, choose My Direct Reports' *<item name>* from the Show menu.

Which type of forecast the results are from.

Refer to the Forecasting Type field in the report results. This field is included in the default page layout for Forecasting Item and Quota reports.


SEE ALSO:


[Custom Report Types in Collaborative Forecasts](#)

[Create a Custom Report Type in Collaborative Forecasts](#)

Guidelines for Viewing Opportunity Details in Collaborative Forecasts

From your forecasts detail page or any subordinate's forecasts detail page, you can view the opportunities that make up a forecast: for a month or month range, for all your subordinates, or just one.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).


- In Lightning Experience, when you return to the opportunity summary after switching the view, leaving the page, or logging out, the most recent sort appears. If the forecast view that you switch to doesn't include the column that you sorted on, the default sort is shown.
- If your sales team forecasts on product families, you can view your own or a subordinate's opportunities for each product family that's forecasted on. When you select a cell in the rollup table, the opportunities related to that cell appear in a list at the bottom of the page. You can sort the opportunities by column header.
- In Salesforce Classic, an opportunity that contains only a single 100% revenue split shows "--" for the split percentage in the opportunity list.
- To view the split details for an opportunity, hover over the split percentage for the opportunity and click  (Salesforce Classic only). The Opportunity Splits detail window appears, showing splits that roll up to the selected forecast cell in bold. Splits on the opportunity that don't roll up to the selected forecast cell appear in gray. Opportunities that contain only a single 100% split for the opportunity owner don't display split details.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise, Performance, Unlimited,** and **Developer** Editions

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Action	Opportunity Name	Account Name	Forecasted Amount	Split
Edit	Canson 55 Widget...	Canson	USD 307,500.00	25.00% 
Edit	Red Packages - 10...	Red Packages	USD 137,500.00	25.00%
Edit	Red Packages - 10...	Red Packages	USD 137,500.00	25.00%
Edit	Canson - 20 Spide...	Canson	USD 43,250.00	25.00%
Edit	Universal Technolo...	Universal Technolo...	USD 14,250.00	25.00%

Opportunity Splits		
25.00%	Kevin Bailey	USD 307,500.00
75.00%	Anna Bressan	USD 922,500.00
Total Opportunity Value:		USD 1,230,000.00

SEE ALSO:

[Partner Portal User Opportunities in Collaborative Forecasts](#)

Guidelines for Refreshing Forecasts in Collaborative Forecasts

Certain actions can change forecast amounts. For example, while you're viewing a forecasts page, your subordinates can edit related opportunities and adjust the forecasts of their own subordinates. And you can adjust one of your subordinates' forecasts from your own page. To see these changes, refresh the forecasts page.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

When any opportunity update or forecast adjustment occurs for a forecast that you've selected in a rollup table, we let you know.

- If the selected forecast has adjustments in process (your own or your subordinate's), you see a processing indicator (⏳) next to the forecast (Salesforce Classic only).
- If any of the selected forecast's related opportunities have been updated, you see the processing indicator in the header of the opportunities list (Salesforce Classic only).
- A message, *Processing Changes*, appears in the opportunities list header.

To see the changes, click **Refresh**.


SEE ALSO:

[Adjusting Forecasts in Collaborative Forecasts](#)

[Adjustments Purges in Collaborative Forecasts](#)

Considerations for Using Quotas in Collaborative Forecasts

Before you use forecast quotas, review some considerations.

 **Note:** This information applies to Collaborative Forecasts and not to [Customizable Forecasts](#).

- In product family forecasts, sales managers can't see their own quotas and quota attainment for individual product families. Only their total quota appears in the rollup table. For example, if three sales reps have combined quota amounts of \$75,000 and their forecast manager has an individual quota of \$30,000, the manager's quota is \$105,000.
- You can edit direct subordinates' quotas only ("Manage Quotas" permission required)—not your own.

SEE ALSO:

[Collaborative Forecasts Concepts](#)

[Show and Hide Quota Information in Collaborative Forecasts](#)

[Enable Quotas in Collaborative Forecasts](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Professional** (no custom field forecasts), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Available in: **Professional** Edition with the "API Enabled" permission

Forecasts FAQ

Get answers to your questions about forecasting.

[What's the difference between Collaborative Forecasts and Customizable Forecasting?](#)

[Can I use territory management features with forecasting features?](#)

SEE ALSO:

[Collaborative Forecasts Concepts](#)

EDITIONS

Collaborative Forecasts available in: both Salesforce Classic and Lightning Experience

Customizable Forecasting available in: Salesforce Classic

Enterprise Territory Management available in: both Salesforce Classic and Lightning Experience

Original Territory Management available in: Salesforce Classic

What's the difference between Collaborative Forecasts and Customizable Forecasting?

[Collaborative Forecasts](#) includes much of the same functionality as [Customizable Forecasting](#).

See which features are available in each version of Forecasting. If you're migrating to Collaborative Forecasts, see [Considerations for Migrating from Customizable Forecasting to Collaborative Forecasts](#).

Feature	Customizable Forecasting	Collaborative Forecasts
API Access	✓	✓
Automatic Rollups	✓	✓
Chat in Real Time		✓
Custom Fiscal Years	✓	✓
Custom Opportunity Currency Field Forecasts		✓ (Not available in Professional Edition)
Default Forecast Currency Setting		✓
Individual Forecast Range Selection—Controlled by User	✓	✓
Map Forecast Categories to Opportunity Stages	✓	✓
Monthly Forecasts	✓	✓
Multiple Currency Support	✓	✓

EDITIONS


Collaborative Forecasts available in: both Salesforce Classic and Lightning Experience

Customizable Forecasting available in: Salesforce Classic

Enterprise Territory Management available in: both Salesforce Classic and Lightning Experience

Original Territory Management available in: Salesforce Classic

Feature	Customizable Forecasting	Collaborative Forecasts
Opportunity-level Adjustments	✓	Can use a custom opportunity currency field to save adjusted amounts and a custom field forecast to track the rollup of that field.
Opportunity List Filters and Sort		✓
Opportunity Splits Forecasts		✓ (Not available in Professional Edition)
Opportunity Stage	✓	✓
Overlay Splits Forecasts		✓ (Not available in Professional Edition)
Override (Adjust) Forecasts	✓	✓
Override (Adjustment) Notes	✓	✓
Partner Opportunities in Forecasts	✓	✓ (Not available in Professional Edition)
Product Family Forecasts	✓	✓
Product Schedule Forecasts	✓	
Quotas	✓	✓
Quantity Forecasts	✓	✓
Quarterly Forecasts	✓	✓
Rename Categories		✓
Reports and Dashboards	✓	✓
Resize Forecast Table Columns		✓
Revenue Forecasts	✓	✓
Share Forecasts	✓	✓ (Pilot, API only)
Snapshots and Forecast History	✓	✓
Sortable Opportunities List From the Forecast Page	✓	✓
Submit Forecasts	✓	

Feature	Customizable Forecasting	Collaborative Forecasts
Territory Management	 (Original Territory Management only)	

SEE ALSO:

[Forecasts FAQ](#)

Can I use territory management features with forecasting features?

Original Territory Management is available for Customizable Forecasting.

SEE ALSO:

[Forecasts FAQ](#)

EDITIONS

Customizable Forecasting available in: Salesforce Classic

Original Territory Management available in: Salesforce Classic

Enterprise Territory Management

Model your sales territories into a logical but flexible structure that connects sales reps to the accounts they sell to.

[Learn About Enterprise Territory Management](#)

Use Enterprise Territory Management to manage and maintain your company's sales territories. Create territory types, build a model, and then add and test your account assignment rules. When you're satisfied with your model, activate it, then assign users and accounts. Roll it out to your team, and then run reports to assess its impact and make adjustments as needed.

[Enable Features for Enterprise Territory Management](#)

Set up and configure features to get the most from Enterprise Territory Management.

[Set Up Territory Types and Territories](#)

A territory model organizes all the elements of your company's territory management plan, including a territory hierarchy, account assignments, and user assignments. Keep your model in the planning state as you build your hierarchy, define assignment rules for territories, add users to territories, and run your rules to see the resulting account assignments.

[Set Up and Manage Territory Assignments](#)

You assign accounts to territories by creating rules that assign them automatically or adding them manually. You can configure rules to apply to both parent territories and their descendents. Manual assignments apply only to the territory where they're made.

[Report on Enterprise Territory Management](#)

Run reports that show account assignments, user assignments, and more.

[Maintain Enterprise Territory Management](#)

Archive or delete territory models, and disable Enterprise Territory Management as needed.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

[Enterprise Territory Management Allocations](#)

Model, territory, and assignment allocations for Enterprise Territory Management.

[Manage Territories with Enterprise Territory Management](#)


Get to know your company's territory model.

SEE ALSO:

[Trailhead: Increase Sales Efficiency with Territory Management](#)

Learn About Enterprise Territory Management

Use Enterprise Territory Management to manage and maintain your company's sales territories. Create territory types, build a model, and then add and test your account assignment rules. When you're satisfied with your model, activate it, then assign users and accounts. Roll it out to your team, and then run reports to assess its impact and make adjustments as needed.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

Salesforce's original territory management feature lets you grant users access to accounts based on criteria such as postal code, industry, revenue, or a custom field relevant to your business. Enterprise Territory Management builds upon the original feature by introducing territory types, territory models, and territory model states. These components let you create and preview multiple territory structures and strategies before you activate and implement the one that works best. Enterprise Territory Management also offers easier assignments between territories, accounts, and opportunities. Custom reports help you organize your territory model for optimum coverage, assess territory effectiveness, and modify your model if necessary. Your team can use Chatter to collaborate as you design and build your territory model.

For comprehensive instructions for implementing this feature, see the *Enterprise Territory Management Implementation Guide*.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

[Territory Type](#)

Territory types help you organize your territories by key characteristics important to your company. Every territory you create has a territory type. Territory types are used for organizing and creating territories only. They don't appear on territory model hierarchies.

[Territory Type Priority](#)

Specifying and managing territory type priority information helps you choose the appropriate territory type for territories you create or edit. You create your own priority scheme. For example, *001* can indicate that a territory type is the highest priority or the lowest. Make sure that your scheme can scale as you add more territory types.

[Territory](#)

Territories organize groups of accounts and the Salesforce users who work with those accounts. Territories are created based on territory types.

[Territory Model](#)

A territory model represents a complete territory management system for your company. Modeling lets you create and preview multiple territory structures and different account and user assignments before you activate the model that works best.

[Territory Hierarchy](#)

The territory hierarchy shows a model's territory structure and serves as its main interaction point. Start from the hierarchy to create, edit, and delete territories; run assignment rules for territories, and navigate to territory detail pages for more information. From the hierarchy, you can also assign territories to opportunities, run assignment rules at the model level, and activate or archive the model.

Territory Model State

Territory model state indicates whether a territory is in the planning stage, in active use, or archived. You can have only one active territory model at a time, but you can create and maintain multiple models in planning or archived state to use for additional modeling or reference.

How Do Permissions Affect Feature and Data Access in Enterprise Territory Management?

When implementing Enterprise Territory Management, make sure you understand how the feature's permissions affect administration and provide access to records and data.

SEE ALSO:

[Trailhead: Increase Sales Efficiency with Territory Management](#)

[Enterprise Territory Management Implementation Guide](#)

Territory Type

Territory types help you organize your territories by key characteristics important to your company. Every territory you create has a territory type. Territory types are used for organizing and creating territories only. They don't appear on territory model hierarchies.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.


For example, you might create a territory type called *Universal Telco Named Accounts*, then from that type, create territories that include named accounts. Or you might create a territory type called *US Geographic*, and from that type create territories based on states or regions.

When you create a territory type, make sure the label and description clearly indicate what kinds of territories should belong to that type.

Territory Type Priority

Specifying and managing territory type priority information helps you choose the appropriate territory type for territories you create or edit. You create your own priority scheme. For example, *001* can indicate that a territory type is the highest priority or the lowest. Make sure that your scheme can scale as you add more territory types.

When you create a new territory, you select a territory type from the `Territory Type` lookup field. From the lookup, you can view the territory type's assigned priority.

 **Example:** Your organization uses territory type priority to reflect your sales strategy for the year. Your organization expects more opportunities within the US east coast than the US west coast in the coming year, so the East Coast territory type is assigned priority *001* and the West Coast territory type is assigned *005*. These priority assignments help those creating territory records make the right territory type choice. At mid-year, you project unexpected growth opportunities in the Great Lakes region, so you create a new territory type called Great Lakes and assign it priority *003* to reflect the change in your sales strategy.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Territory

Territories organize groups of accounts and the Salesforce users who work with those accounts. Territories are created based on territory types.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

The territory record shows you assigned users, manually assigned accounts, and rules that assign accounts automatically. A territory can have both parent and child territories. Depending on how your organization assigns accounts, an account may be assigned to more than one territory.

Territory Model

A territory model represents a complete territory management system for your company. Modeling lets you create and preview multiple territory structures and different account and user assignments before you activate the model that works best.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Each territory model features a graphical hierarchy. The hierarchy shows your model's territory structure (including parent and child territories) and lets you create, edit, and delete territories and view their detail pages. Your organization can create and modify up to four different territory models at a time, but only one model can be active at any time. Activate the model you want to use to finalize its user and account assignments.

Territory Hierarchy

The territory hierarchy shows a model's territory structure and serves as its main interaction point. Start from the hierarchy to create, edit, and delete territories; run assignment rules for territories, and navigate to territory detail pages for more information. From the hierarchy, you can also assign territories to opportunities, run assignment rules at the model level, and activate or archive the model.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

The name and state of the territory model appear at the top node of the hierarchy (1). Parent and child territories are nested beneath the model name (2). Create or edit new child territories or run their assignment rules (3). Run the filter that assigns territories to opportunities (4). Run assignment rules for all territories in the model (5). Hover to learn when rules were last run (6). Set the model's state to *Active* or *Archive* (7). Toggle to a sorted list view and back to tree view (8).

Territory Model State

Territory model state indicates whether a territory is in the planning stage, in active use, or archived. You can have only one active territory model at a time, but you can create and maintain multiple models in planning or archived state to use for additional modeling or reference.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Some states reflect a territory model's lifecycle and others indicate errors in processing when states are changed.

Lifecycle State

Definition

Planning

The default state for every new territory model you create. The `Planning` state lets you preview a model's territory hierarchy before deploying it. Users have no territory-related access to accounts in models that are in the `Planning` state.

Active

The state of a territory model after you activate it and all processing is complete. Only *one* model in your Salesforce organization can be active at a time.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Lifecycle State**Definition**

Archived

A model in `Active` state lets users view model details, including hierarchies, territories, and all assigned accounts and users. Users assigned to territories within an active model can access and modify accounts they are assigned to within that model.

The state of a territory model after you archive it and all processing is complete. An archived model no longer provides account access to users, but it does let administrators view hierarchy and rule assignments as they were configured when the model was active. Only the *active* model can be archived, and archived models cannot be reactivated.

When you archive a territory model or delete a territory on an active model, the `Territory` field is reset to a blank value on opportunity records with those territories assigned.

Error State**Definition**

Activation Failed

An error occurred during activation. Check your email for more information from Salesforce.

Archiving Failed

An error occurred during activation. Check your email for more information from Salesforce.

How Do Permissions Affect Feature and Data Access in Enterprise Territory Management?

When implementing Enterprise Territory Management, make sure you understand how the feature's permissions affect administration and provide access to records and data.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Make sure user permissions provide the appropriate level of access for users. For example, you might want Sales Operations managers and selected Sales managers to be able to manage territories. If so, assign them the "Manage Territories" permission. Anyone who will also create account assignment rules also needs the "View All" permission on Accounts.

Users who need to:**Require these permissions, roles, or ownership:**

- Create territory models and all related records (such as territory types)
- View and manage territory models in all states: `Planning`, `Active`, and `Archived`
- Activate, archive, delete, or clone territory models

Manage Territories

EDITIONS

Available in: both Salesforce Classic and Lightning Experience


Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Users who need to:**Require these permissions, roles, or ownership:**

- View territory information on territory-assigned account records for territories in models in *all* states (*Planning*, *Active*, and *Archived*)


- Create or edit account assignment rules

Manage Territories AND View All on Accounts

 **Note:** Which fields are available for account assignment rules depends on account field-level security settings, if any. For example, a user has the appropriate permissions for creating account assignment rules, but her profile prevents her from viewing the Account object's *Annual Revenue* field. She will not be able to create account assignment rules that include that field.

- View the Salesforce Setup tree, including territories settings
- View the territory model in *Active* state, including its related records (such as territory types and assignment rules) and other elements (such as the territory hierarchy)
- View the names of all account records assigned to territories in the *Active* territory model
- View territory information on territory-assigned account records for territories in models in the *Active* state only

View Setup and Configuration


 **Note:** View Setup and Configuration is enabled by default for the Standard User profile.

View data for models in *Planning* and *Archived* states on reports that include territories, assigned records, or rules

Manage Territories

Manually assign a territory to an opportunity

Sharing access for the opportunity's account. Users who have sharing access to the account can assign any active territory to the opportunity. Those who do not can assign only a territory that is also assigned to the opportunity's account.

 **Note:** For manual territory assignments, Salesforce suggests opportunities assigned to the territory's account, but those with sharing access can search for and assign any territory in the active territory model.

When a territory is assigned to an opportunity, that opportunity is shared with all Salesforce users assigned to that territory's parent in the territory model hierarchy.

Enable Features for Enterprise Territory Management

Set up and configure features to get the most from Enterprise Territory Management.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

[Enable Enterprise Territory Management](#)

Turn on Enterprise Territory Management for your reps. If you started using Salesforce before Winter '15, ask Salesforce to enable the feature. If you've enabled Customizable Forecasting, Enterprise Territory Management can't be enabled.

[Define Default User Access for Territory Records](#)

Specify the default settings for how users can access and modify records associated with the sales territories you set up. You can change the access provided by default settings when you create or edit a territory.

[Enable Filter-Based Opportunity Territory Assignment](#)

Enable and configure filter-based assignment of territories to opportunities.

[Use Chatter to Collaborate on Territory Models](#)

Enable Chatter Feed Tracking for territory models to collaborate on model development directly within model records. Your team can post and respond to comments, attach files, and get notifications when model states change or key fields are updated.


SEE ALSO:

[Trailhead: Increase Sales Efficiency with Territory Management](#)

[Learn About Enterprise Territory Management](#)

Enable Enterprise Territory Management

Turn on Enterprise Territory Management for your reps. If you started using Salesforce before Winter '15, ask Salesforce to enable the feature. If you've enabled Customizable Forecasting, Enterprise Territory Management can't be enabled.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

1. From Setup, enter *Territories* in the Quick Find box, and then select the territory settings.
2. Click **Enable Enterprise Territory Management**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To manage territories:

- Manage Territories

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable Enterprise Territory Management:

- Customize Application

Define Default User Access for Territory Records

Specify the default settings for how users can access and modify records associated with the sales territories you set up. You can change the access provided by default settings when you create or edit a territory.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

The standard record access settings apply to accounts and opportunities. If your organization uses *Private* default internal access for contacts or cases, you can also set access for those records.

1. From Setup, enter *Territories* in the Quick Find box, and then select the territory settings.
2. Select the default access levels you want for accounts and opportunities.
3. If applicable, select the default access levels for contacts and cases.
4. Click **Save**.

SEE ALSO:

[Organization-Wide Sharing Defaults](#)

[Set Your Organization-Wide Sharing Defaults](#)

Enable Filter-Based Opportunity Territory Assignment

Enable and configure filter-based assignment of territories to opportunities.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From Setup, enter *Territories* in the Quick Find box, and then select the territory settings.
2. Enable Filter-Based Opportunity Territory Assignment.
3. If your organization is using the Apex code Salesforce provides, first create the class and then return to this Settings page and enter the class name: *OppTerrAssignDefaultLogicFilter*. If you opt to use your own code for the Apex class, you'll come back and enter the name of the class that you create.
4. If you want to run the filter-based opportunity territory assignment job when opportunities are created, select that option.
5. Save your settings.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To create a territory model:

- View Setup and Configuration
- AND
- Manage Territories

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable Enterprise Territory Management:

- Customize Application

Use Chatter to Collaborate on Territory Models

Enable Chatter Feed Tracking for territory models to collaborate on model development directly within model records. Your team can post and respond to comments, attach files, and get notifications when model states change or key fields are updated.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

After you enable and configure Chatter Feed Tracking, anyone with access to a territory model record can use Chatter to collaborate on that model. Those who follow the record will get updates in their own Chatter feeds when tracked fields are updated.

1. Make sure that Chatter has been enabled.
2. From Setup, enter *Feed Tracking* in the *Quick Find* box, then select **Feed Tracking**.
3. Select the Territory Model object. Enable Feed Tracking, then select the territory model fields you want to track.
4. Click **Save**.
The Chatter feed appears at the top of your organization's territory model records.
5. Make sure to tell others who maintain territory models that they can now use Chatter to follow and collaborate on territory models directly from model records.


SEE ALSO:

[Customize Chatter Feed Tracking](#)

[Salesforce Chatter](#)

Set Up Territory Types and Territories

A territory model organizes all the elements of your company's territory management plan, including a territory hierarchy, account assignments, and user assignments. Keep your model in the planning state as you build your hierarchy, define assignment rules for territories, add users to territories, and run your rules to see the resulting account assignments.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

1. [Create Territory Types](#)
Territory types help you categorize and define individual territories. Creating territory types is the first step in building your territory model in Salesforce.
2. [Create a Territory Model Record](#)
Create a record to connect territories, user assignments, and account assignments. When you create a territory model record, Salesforce creates a territory hierarchy for it.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable Chatter Field Tracking:

- Customize Application

To share a Chatter post on a territory model record:

- View Setup and Configuration

AND

Manage Territories

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To build a territory model:

- View Setup and Configuration

AND

Manage Territories

3. [Create Territories](#)

Create territories as you build your company's territory model. When you create a territory, it appears on the model's territory hierarchy.

SEE ALSO:

[Trailhead: Increase Sales Efficiency with Territory Management](#)

Create Territory Types

Territory types help you categorize and define individual territories. Creating territory types is the first step in building your territory model in Salesforce.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Examples of territory types you might create include *Named Accounts*, *Direct Accounts*, and *Overlay Sales*.

1. From Setup, enter *Territory Types* in the **Quick Find** box, then select **Territory Types**.
2. Click **New Territory Type**.
3. Enter a label and a description. In your description, make sure you clearly indicate what kinds of territories should belong to that type.
4. Specify a territory type priority.
5. Click **Save**.

SEE ALSO:

[Territory Type Priority](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To create a territory type:

- View Setup and Configuration
- AND
- Manage Territories

Create a Territory Model Record

Create a record to connect territories, user assignments, and account assignments. When you create a territory model record, Salesforce creates a territory hierarchy for it.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Your organization's Salesforce edition determines the number of territory models you can create in production and sandbox orgs. This limit includes models created by cloning.

Edition	Number of Models in Production	Number of Models in Sandbox
Developer	4	4
Enterprise	2	2
Performance	4	4
Unlimited	4	4

1. From Setup, enter *Territory Models* in the Quick Find box, then select **Territory Models**.
2. Click **New Territory Model**.
3. Define the label and description fields.
4. Click **Save**.

SEE ALSO:

[Enterprise Territory Management Allocations](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To create a territory model record:

- View Setup and Configuration
- AND
- Manage Territories

Create Territories

Create territories as you build your company's territory model. When you create a territory, it appears on the model's territory hierarchy.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

By default, each territory model can have up to 1,000 territories.

1. Open the territory model where you want to create the territory.
2. If you need to, select **Tree View** from the drop-down to show the model's territory hierarchy, including any existing territories.
3. To create a top-level territory, hover over the territory model name and click **Create Territory**. To create a child territory from an existing territory, hover over the territory name and click **Create Territory**.
4. On the New Territory page, define the territory: give it a meaningful label, choose its territory type. If the territory requires *different* user access for accounts and opportunities than the *default* user access for those records, define the territory's user access levels.
5. Click **Save**.

Set Up and Manage Territory Assignments

You assign accounts to territories by creating rules that assign them automatically or adding them manually. You can configure rules to apply to both parent territories and their descendents. Manual assignments apply only to the territory where they're made.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Before you commit to your model's account assignments, you should preview them by running assignment rules and related reports while the model is in **Planning** state. When you're satisfied with your planned account assignments, change the model to **Active** state. Then, run assignment rules again so that your territories include affected accounts that were created or updated during the activation process.

[Use Rules to Assign Accounts to Territories](#)

Create and run rules that automatically assign new or edited accounts to territories. A rule identifies one or more characteristics you use to define that territory, and tells Enterprise Territory Management to assign accounts with those characteristics to that territory automatically. If your territory is in Planning state, running rules lets you preview account assignments. If your territory is in Active state when you run rules, accounts are assigned to territories according to your rules.

[Assign Accounts to a Territory Manually](#)

Accounts that aren't assigned to territories by rules can be assigned manually to one or more territories, one territory at a time. Manual assignment is useful for accounts that have unique characteristics and therefore can't be assigned by rules.

[Preview Territory Account Assignments](#)

Before you activate a territory model, preview and validate its territory account assignments. Preview assignments by running assignment rules when the model is in Planning state. Also verify your manual assignments.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To create territories:

- View Setup and Configuration
- AND
- Manage Territories

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

[Identify Users in Territories Assigned to an Account](#)

Accounts and users are assigned to territories independently, but when an account is assigned to a territory, that territory's users have access to the account. It's easy to find out who those users are by looking at the account record.

[Assign One or More Territories Manually to an Account](#)

Assign one or more territories to an account directly from the account record. Only territories that belong to models in Planning or Active state can be assigned to accounts.

[Assign One or More Assignment Rules Manually to a Territory](#)

Assign one or more object assignment rules to a territory directly from the territory record. Available rules come from the territory model the territory belongs to.

[Assign a Territory Manually to an Opportunity](#)

On an opportunity record, you can assign and track the territory whose assigned sales reps work that opportunity. Manual territory assignments are controlled by your access to the opportunity's assigned (parent) account. When you assign a territory to an opportunity, that opportunity is shared with all Salesforce users assigned to that territory's parent in the territory model's hierarchy.

[Run the Opportunity Territory Assignment Filter](#)

The opportunity territory assignment filter assigns territories to opportunities based on the filter logic in the Apex class.

[Clone a Territory Model](#)

Cloning lets you make a copy of a territory model that you can use to test territory characteristics. The new model includes the original's territories, assignment rules, users, and manually assigned accounts. Only models in Planning, Active, or Archived state can be cloned. When cloning is complete, the new model is in Planning state.

[Assign Users to Territories](#)

Assign users to the territories they operate in to sell products and services. You can assign users to territories that belong to models in Active or Planning state, though assignments made within Planning state models are for planning purposes only. They don't affect user access to records.

[Identify Territory Users by Territory Role](#)

Keep track of user functions within territories by creating territory roles and assigning them to territory users as needed. For example, create roles such as Territory Owner, Sales Manager, Product Specialist, or Sales Representative. Users can even have different roles in different territories.

[Define a Picklist for Territory User Roles](#)

Add territory roles to the UserTerritoryAssociation object's Role in Territory picklist so you can select roles for territory users. The Role in Territory picklist you define can be used for all territories in Active or Planning state.

[Assign Territory Roles to Users](#)

Assign territory roles to identify the roles of users within territories.

[Activate a Territory Model](#)

When you're satisfied with the structure of your territory model and its territory account assignments, you're ready to activate it. Remember that you can also maintain models in Planning and Archived states for further modeling and reference.

[Configure Enterprise Territory Management Permissions and Access for Administrators and Users](#)

An important step in implementing Enterprise Territory Management is making sure the right users can access the right territory model elements, records, and record elements.

[Run Assignment Rules for a Territory](#)

Run account assignment rules for any territory that has rules defined and belongs to a territory model in Planning or Active state. If your territory is in Planning state, running rules lets you preview account assignments. If your territory is in Active state when you run rules, accounts are assigned to territories according to your rules.

[Find Out Which Territories an Assignment Rule Applies To](#)

If you use rules to assign accounts to territories, it can be helpful to find out which territories a single rule applies to.

[View and Manage Assignment Rules at the Territory Model Level](#)

View and manage account assignment rules at a high level. Start from the territory model record to create, edit, or view rules for the model's territories. From the model-level list of rules, you can view rule criteria, or open a rule record to find out which territories it's assigned to.

[Activating Assignment Rules and Applying Them to Descendant Territories](#)



The ability to apply an assignment rule to descendant territories is available at the territory level only. You can't apply assignment rules to descendants at the territory model level. The only option you get is to apply a rule to descendant territories if you access the rule's record from an individual territory.


SEE ALSO:

[Trailhead: Increase Sales Efficiency with Territory Management](#)

Use Rules to Assign Accounts to Territories


Create and run rules that automatically assign new or edited accounts to territories. A rule identifies one or more characteristics you use to define that territory, and tells Enterprise Territory Management to assign accounts with those characteristics to that territory automatically. If your territory is in Planning state, running rules lets you preview account assignments. If your territory is in Active state when you run rules, accounts are assigned to territories according to your rules.

-  **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.
-  **Tip:** It's a best practice *not* to assign a rule to a territory if that rule is a child of another rule *already assigned* to the territory. To find out what rules apply to a territory, just open the territory's record detail page and look at the Assignment Rules Assigned to this Territory related list. If a rule has `Apply to Child Territories` selected, do not assign the rule separately to child territories.

1. From the territory model hierarchy, open the territory where you want to create a rule.
2. On the detail page, in the Assignment Rules Defined in this Territory related list, click **New**.
3.  **Note:** If your org has enabled state and country picklists, territory assignment rules using states as a criteria must use `contains` matching instead of `equals` matching.

On the rule edit page, enter a name for the new rule and define selection criteria.

4. If you want the rule to also apply to the current territory's descendents, select the **Apply to child territories** checkbox.
5. If you want the rule to run automatically when a user creates or updates an account, select the **Active** checkbox.

-  **Note:** For account updates, these conditions are required for the territory rules to run.
 - If the account is updated via the UI, **Evaluate this account against territory rules on save** is selected.
 - If the account is updated via API, `AssignmentRuleHeader` is specified.

In Lightning Experience, the option to evaluate an account against territory rules when it's updated and saved isn't available. So active account assignment rules run automatically only if the update happens via API.

6. Click **Save** to save the rule and return to the territory detail page.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience


Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To create rules within your territories:

- Customize Application Manage Territories

- (Optional) In the Assignment Rules Defined in This Territory related list, click **Run Rules**. You'll receive an email when the process is complete.

 **Example:** Rules can work together within territories and child territories. For example, you create a territory called Western States, with child territories Washington, Oregon, and California. From the Western States territory record, you create a rule that assigns accounts in Washington, Oregon, and California to that territory. You apply that rule to child territories and then, from the California territory record, you create a rule that assigns accounts in California to the California territory.

For any child territories for the California territory, you don't need to specify the state in the criteria if you mark the California territory rule as inheritable to child territories. Instead, you can use more specific criteria, such as ZIP code or industry.

SEE ALSO:

[Activating Assignment Rules and Applying Them to Descendant Territories](#)

Assign Accounts to a Territory Manually

Accounts that aren't assigned to territories by rules can be assigned manually to one or more territories, one territory at a time. Manual assignment is useful for accounts that have unique characteristics and therefore can't be assigned by rules.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

- From the territory model hierarchy, open the territory where you want to assign one or more accounts.
- On the territory's detail page, in the Manually Assigned Accounts related list, click **Add Accounts** to see a list of your organization's accounts. Adjust the list view if you need to.
- In the **Available** related list, select the checkbox for each account you want to assign. If you need to view more records, click **More** beneath the list. Each selected account appears in the Selected related list.
- Click **Assign**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud




USER PERMISSIONS

To assign accounts manually within your territories:

- View Setup and Configuration
- AND
- Manage Territories

Preview Territory Account Assignments

Before you activate a territory model, preview and validate its territory account assignments. Preview assignments by running assignment rules when the model is in Planning state. Also verify your manual assignments.

-  **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.
-  **Important:** To protect data quality, you cannot modify a territory until you receive the email confirming that the rules have been run successfully. If rules do not run successfully, follow instructions provided in the email for troubleshooting specific issues.
- 1. Open the record for the territory model whose assigned accounts you want to preview and click **View Hierarchy**.
- 2. Verify that the model is in `Planning` state.
- 3. Click **Run All Rules**.
When rules are finished running, we'll send an email to let you know. Processing may take some time, depending on the size and complexity of your organization.
- 4. From the territory model hierarchy, open each territory and descendent affected assignment rules. Also open territories that have manual account assignments.
- 5. On the territory detail page, click **View Accounts** to see assigned accounts. The `Method` column indicates how each account was assigned: by a rule or manually.
-  **Note:** If you make changes to the rules for a territory, you must run rules again to view those changes. In this case, you may want to run rules on that territory only. To do so, navigate to the territory's detail page, scroll to the Assignment Rules Defined in this Territory related list, and click **Run Rules**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To preview territory model account assignments:


- View Setup and Configuration
- AND
- Manage Territories


Identify Users in Territories Assigned to an Account

Accounts and users are assigned to territories independently, but when an account is assigned to a territory, that territory's users have access to the account. It's easy to find out who those users are by looking at the account record.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Open the account record that has territories assigned.
2. Identify the users from the Users in Assigned Territories related list.

 **Note:** The `Modified Date` field in this related list tells the last time the user territory association record was modified. It may or may not indicate when the user was assigned to the territory.

 **Example:** Six sales reps are assigned to the East Coast territory. Because XYZ Publishing is also assigned to the East Coast territory, the six sales reps in the territory appear in the Users in Assigned Territories related list on the XYZ Publishing account record.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To view users in territories from `Active`, `Planning`, or `Archived` territory models that are assigned to an account:

- View Setup and Configuration

AND

Manage Territories

To view users in territories in the `Active` territory model that are assigned to an account:

- View Setup and Configuration

Assign One or More Territories Manually to an Account

Assign one or more territories to an account directly from the account record. Only territories that belong to models in Planning or Active state can be assigned to accounts.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. If you're using Lightning Experience, switch to Salesforce Classic.
2. Open the account you want to assign territories to.
3. On the account's detail page, in the Assigned Territories related list, click **Assign Territories** to see a list of your organization's territories. Adjust the list view if you need to.
4. Select the territory model that contains the territories you want to associate.
5. In the `Available` related list, select the checkbox for each territory you want to assign. If you need to view more records, click **More** beneath the list. Each selected territory appears in the `Selected` related list.
6. Click **Assign**.

EDITIONS

Available in: Salesforce Classic only

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To assign territories manually within your accounts:

- View Setup and Configuration
- AND
- Manage Territories

To view territories from `Active`, `Planning`, or `Archived` territory models that are assigned to an account:

- View Setup and Configuration
- AND
- Manage Territories

To view territories assigned from the `Active` territory model that are assigned to an account:

- View Setup and Configuration

Assign One or More Assignment Rules Manually to a Territory

Assign one or more object assignment rules to a territory directly from the territory record. Available rules come from the territory model the territory belongs to.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Territories can have up to 15 assignment rules each.

1. Open the territory you want to assign rules to.
2. On the territory's detail page, in the **Assignment Rules Assigned to This Territory** related list, click **Assign Rules** to see a list of rules available in the model.
3. In the **Available** related list, hover over the names of available rules to view the details of their criteria. Select the checkbox for each rule you want to assign to the territory. If you need to view more rules, click **More** beneath the list. Each selected rule appears in the **Selected** related list.
4. Apply selected rules to child territories as appropriate.
5. Click **Assign**.


Assign a Territory Manually to an Opportunity

On an opportunity record, you can assign and track the territory whose assigned sales reps work that opportunity. Manual territory assignments are controlled by your access to the opportunity's assigned (parent) account. When you assign a territory to an opportunity, that opportunity is shared with all Salesforce users assigned to that territory's parent in the territory model's hierarchy.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Users who *have* full access to the opportunity's account can assign *any* territory from the active model to the opportunity. Those who *do not* can assign *only* a territory that is *also* assigned to the opportunity's account. For manual territory assignments, Salesforce suggests opportunities assigned to the territory's account, but those with full access can search for and assign any territory in the active territory model.

1. Open the opportunity record.
2. In the **Territory** field, specify the territory you want to assign.
3. Save the opportunity record.

 **Example:** The Utel.com account has six opportunities and two territories (East Coast and West Coast). They can assign East Coast, West Coast, or any other territory within the active model to any or all of those six opportunities. One of their sales reps has full access to the account assigned to one of the opportunities, so she can assign any territory to that opportunity. For the other five opportunities, she does not have full access to the assigned accounts, so for each of those, she can only assign a territory that is already assigned to the opportunity's assigned account.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To assign rules to a territory:

- View Setup and Configuration
- AND
- Manage Territories

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To manually assign territories to an opportunity:

- View Setup and Configuration
- AND
- Manage Territories
- AND
- Full access to the opportunity's assigned (parent) account

Run the Opportunity Territory Assignment Filter

The opportunity territory assignment filter assigns territories to opportunities based on the filter logic in the Apex class.

1. From Setup, enter *Territories* in the Quick Find box, and then select the territory settings.
2. Verify these settings.
 - Filter-based opportunity territory assignment is enabled.
 - An Apex class is specified.
3. From Setup, enter *Territory Models* in the Quick Find box, then select **Territory Models**.
4. View the active territory model's hierarchy.
5. Click **Run Opportunity Filter**, and then select options for the opportunities and date ranges to include.
6. Run the opportunity filter.
When the job is complete, you receive an email.


Clone a Territory Model

Cloning lets you make a copy of a territory model that you can use to test territory characteristics. The new model includes the original's territories, assignment rules, users, and manually assigned accounts. Only models in Planning, Active, or Archived state can be cloned. When cloning is complete, the new model is in Planning state.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

After the cloning process is complete, the new territory model it creates is in `Planning` state.

1. Open the territory model you want to clone.
2. Click **Clone**.
3. Define the label and description fields.
4. Click **Save**. The model state changes to `Cloning` while Salesforce processes your request. Cloning may take some time, depending on the size and complexity of your model.

 **Note:** During the process, triggers defined against the `Territory2Model`, `Territory2`, or `UserTerritory2Association` objects do not fire.

When the process is complete, we send you an email to let you know.

SEE ALSO:

[Enterprise Territory Management Allocations](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To run the opportunity territory assignment filter:

- View Setup and Configuration
- AND
- Manage Territories

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To clone a territory model:

- View Setup and Configuration
- AND
- Manage Territories

Assign Users to Territories

Assign users to the territories they operate in to sell products and services. You can assign users to territories that belong to models in Active or Planning state, though assignments made within Planning state models are for planning purposes only. They don't affect user access to records.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From the territory model hierarchy, open the territory where you want to assign users.
2. On the territory's detail page, in the Assigned Users related list, click **Manage Users**.
3. On the Assign Users page, select or search for the user you want to add.
4. Click **Save**.

Identify Territory Users by Territory Role

Keep track of user functions within territories by creating territory roles and assigning them to territory users as needed. For example, create roles such as Territory Owner, Sales Manager, Product Specialist, or Sales Representative. Users can even have different roles in different territories.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

SEE ALSO:

[Add or Edit Picklist Values](#)

[Define a Picklist for Territory User Roles](#)

[Assign Territory Roles to Users](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To assign users to territories:

- View Setup and Configuration

AND

Manage Territories

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Define a Picklist for Territory User Roles

Add territory roles to the UserTerritoryAssociation object's Role in Territory picklist so you can select roles for territory users. The Role in Territory picklist you define can be used for all territories in Active or Planning state.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. If you're using Lightning Experience, switch to Salesforce Classic.
2. From the object management settings for user territory associations, go to the fields area.
3. Click **Role in Territory**, and then click **New**.
4. Enter the picklist values you want and click **Save**.
The values you entered are now available for selection from the `Role in Territory` picklist on the territory's Users Assigned edit page.

Assign Territory Roles to Users

Assign territory roles to identify the roles of users within territories.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure that you've created a Role in Territory picklist so you have some roles to select for users.
2. Open the record of the territory where you want to assign territory roles.
3. In the Assigned Users list, click **Edit** next to the name of a user to whom you're assigning a territory role.
4. From the `Role in Territory` picklist, select the user's territory role.
5. Click **Save**.

EDITIONS

Available in: Salesforce Classic only

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To define picklists:

- Customize Application

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS


To assign territory roles to users:

- View Setup and Configuration
AND
Manage Territories

Activate a Territory Model

When you're satisfied with the structure of your territory model and its territory account assignments, you're ready to activate it. Remember that you can also maintain models in Planning and Archived states for further modeling and reference.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

 **Important:** Only one model can be in the `Active` state at one time in your organization, and you can only activate a model that is in the `Planning` state. After activating a model, you cannot reset it to `Planning` state; you can only set it to `Archived` state.

1. If you need to, preview account assignments before activating the model.
2. Open the record for the territory model you want to activate and click **View Hierarchy**.
3. Click **Activate**.

The model state changes to `Activating` while Salesforce processes your request. Activation may take some time, depending on the size and complexity of your model. When the process is complete, we'll send you an email to let you know.

SEE ALSO:

[Territory Model State](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To activate a territory model:

- View Setup and Configuration
- AND
- Manage Territories

Configure Enterprise Territory Management Permissions and Access for Administrators and Users

An important step in implementing Enterprise Territory Management is making sure the right users can access the right territory model elements, records, and record elements.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure you understand how permissions affect territory model and record access in Enterprise Territory Management.
2. Assign user permissions as needed.
3. Add the Assigned Territories related list to your account page layouts. This list lets administrators manually assign territories to accounts (Salesforce Classic only), and it lets users identify which territories are assigned to their accounts. Make sure the related list includes the standard and custom fields (if any) that administrators and users need to view.
4. Add the Users in Assigned Territories related list to your account page layouts. This list lets administrators and users see all users assigned to the territories that are assigned to an account, according to their permissions. Make sure the related list includes the standard and custom fields (if any) that administrators and users need to view.
5. Add the `Territory` field to your Opportunity page layouts. This field lets administrators and sales managers manually assign a territory to an opportunity from a list of the territories assigned to the opportunity's account. Add the `Territory Name` and `Territory Description` fields to Opportunity list views and reports so that users can identify assigned territories there.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To assign user permissions:

- Manage Users

To create, edit, and delete page layouts:

- Customize Application

6. Add any custom buttons, links, or actions you've created to territory page layouts.

SEE ALSO:

[How Do Permissions Affect Feature and Data Access in Enterprise Territory Management?](#)

[Profiles](#)

[Permission Sets](#)

[Enhanced Page Layout Editor User Interface Elements](#)

Run Assignment Rules for a Territory

Run account assignment rules for any territory that has rules defined and belongs to a territory model in Planning or Active state. If your territory is in Planning state, running rules lets you preview account assignments. If your territory is in Active state when you run rules, accounts are assigned to territories according to your rules.



Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Open the hierarchy for the territory model the territory model belongs to.
2. In the tree view or list view, find the territory you want to run rules for.
3. In list view, click **Run Rules**. In tree view, hover over the territory name and then click **Run Rules**. If you want to view the territory record's details, including its assigned rules, *before* you run its rules, open the record and then click the **Run Rules** button in the Assignment Rules Assigned to This Territory related list.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To run rules within your territories:

- Customize Application
AND
Manage Territories

Find Out Which Territories an Assignment Rule Applies To

If you use rules to assign accounts to territories, it can be helpful to find out which territories a single rule applies to.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From Setup, enter *Territory Models* in the **Quick Find** box, then select **Territory Models** to view a list of your organization's territory models.
2. Find the model in which the rule operates and click **View Rules** to see a list of all the rules associated to the model and its territories.
3. Click the rule name and look for the territories it applies to in the Assigned Territories related list.

View and Manage Assignment Rules at the Territory Model Level

View and manage account assignment rules at a high level. Start from the territory model record to create, edit, or view rules for the model's territories. From the model-level list of rules, you can view rule criteria, or open a rule record to find out which territories it's assigned to.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From Setup, enter *Territory Models* in the **Quick Find** box, then select **Territory Models**.
2. Click **View Rules** next to the territory model whose rules you want to manage.
3. On the Assignment Rules list view, you can create a new rule, open a rule record for complete details, or hover over the rule name to view its criteria.

Assignment Rules in US Sales Territory Model

[← Back to List: Territory Models](#)

View: All [Create New View](#)

A | B | C | D | E | F | G | H

Action	Rule Name ↑	Object	Active	Created Date
Edit Del	Northern California	Southern California Details	✓	6/18/2014 11:51 AM
Edit Del	Southern California	Rule Criteria Account: Billing City equals Los Angeles	✓	7/16/2014 11:56 AM

[New Rule](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To view assignment rule details:

- Customize Application AND Manage Territories

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To create or manage territory rules:

- View Setup and Configuration AND Manage Territories

SEE ALSO:

[Find Out Which Territories an Assignment Rule Applies To](#)

Activating Assignment Rules and Applying Them to Descendant Territories

The ability to apply an assignment rule to descendant territories is available at the territory level only. You can't apply assignment rules to descendants at the territory model level. The only option you get is to apply a rule to descendant territories if you access the rule's record from an individual territory.



Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

With this restriction in mind, make sure that you create or edit a rule record from the appropriate place. Starting from the territory record gives you the most options. Make sure that you activate all assignment rules you want to use: inactive rules *do not* affect assignments for associated territories or any descendant territories they have been applied to.



Example: You have a territory model called US, and its hierarchy has two territories: Eastern States and Western States. The Eastern States territory has an assigned rule called Eastern States Accounts. If you open the record for the territory model, US, then click **View Rules** and from there click **Edit** to edit the Eastern States Accounts rule record, the final step lets you activate the rule.

If you start from the Eastern States territory record, then click **Edit** next to the Eastern States Accounts rule record, in addition to the step where you activate or deactivate the rule, you'll see an additional step that lets you apply the rule to the Eastern States territory's descendants.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Report on Enterprise Territory Management

Run reports that show account assignments, user assignments, and more.

[Create Custom Report Types for Enterprise Territory Management Reports](#)

Set up custom report types so sales managers and other users can create the reports they need.

[Report on Accounts Assigned to Territories](#)

Manage account assignments to sales territories by reporting on which accounts have been assigned to territories. See which accounts belong to which territories.

[Report on Territories Without Assigned Accounts](#)

Manage account assignments to sales territories by reporting on which territory models' territories don't have assigned accounts.

[Report on Users Not Assigned to Territories](#)

Manage user assignments to sales territories by reporting on which users haven't been assigned to territories.

[Report on Territories with Assigned Users](#)

Manage user assignments to sales territories finding out which territory models' territories have users assigned. See which assigned users belong to which territories.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

[Report on Summarizable Account Fields by Territory](#)

Gauge territory size by reporting on summarizable account data, such as annual revenue or number of employees.

Create Custom Report Types for Enterprise Territory Management Reports

Set up custom report types so sales managers and other users can create the reports they need.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure you're familiar with custom report types and the general steps for creating and maintaining them.
2. Create custom report types relating these objects and configuring them as necessary. Make all fields available for reporting. Add each report to the Territory Management report type category. Provide a clear name and description for each report type so users who create reports can understand which one to use for their needs.

Report (Topics for selected reports are linked)	A (Primary Object)	B	C
Accounts assigned to territories	Accounts	Territories Select "A" records must have related "B" records.	–
Accounts not assigned to territories	Accounts	Territories Select "A" records may or may not have related "B" records.	–
Territories with assigned accounts	Territory Models	Territories	Territory-Assigned Records Select "B" records must have related "C" records.
Territories without assigned accounts	Territory Models	Territories	Territory-Assigned Records Select "B" records may or may not have related "C" records.
Users assigned to territories	Users	Territories Select "A" records must have related "B" records.	–

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To create or update custom report types:

- Manage Custom Report Types

To delete custom report types:

- Modify All Data

Report (Topics for selected reports are linked)	A (Primary Object)	B	C
Users not assigned to territories	Users	Territories Select "A" records may or may not have related "B" records.	–
Territories with assigned users	Territory Models	Territories	Users Select "B" records must have related "C" records.
Territories without assigned users	Territory Models	Territories	Users Select "B" records may or may not have related "C" records.
Summarizable account information by territory	Accounts	Territories Select Each "A" record must have at least one related "B" record.	–

3. Deploy the report types you want to make available to users.
4. Let users know that they can create reports using these custom report types.

SEE ALSO:


[Create a Custom Report Type](#)

Report on Accounts Assigned to Territories

Manage account assignments to sales territories by reporting on which accounts have been assigned to territories. See which accounts belong to which territories.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Accounts and Territories objects. It should specify that the Accounts object *must* have related Territory records and it should make all fields on these objects available for reporting.
2. Create your report: click the Reports tab, then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report.
4. Click **Create**.
5. Make sure that the Accounts field *Account Name* and the Territories field *Label* appear on the report. If they do not, add them.
6. (Optional) Filter the report results. To show data from territory models in *Active state only*, from the *Filters* drop-down list, select *Field Filter*. Configure the filter options to show *Territory Model: Label equals <name of active territory model>* and then click **OK**. From the **Show** field, to filter by account ownership, select *My accounts, My team's accounts, or My territory teams' accounts*. To filter by user territory assignment, select *My territories' accounts*.

 **Important:** If you later activate a different territory model, make sure you update the territory model name variable in this report.

7. Add any other fields you find useful for this report.
8. Save the report and run it.
9. (Optional) Summarize information by Accounts field *Account Name* to show each account along with the number of territories it's assigned to.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

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

Report on Territories Without Assigned Accounts

Manage account assignments to sales territories by reporting on which territory models' territories don't have assigned accounts.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Territory Models, Territories, and Territory-Assigned Records objects. It should specify that the Territories object *may or may not* have related Territory-Assigned records and should make all fields on these objects available for reporting.
2. Create your report: click the Reports tab, then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report.
4. Click **Create**.
5. Make sure that the Territory Models field *Label* and the Territories field *Label* appear on the report. If they do not, add them.
6. From the **Filters** drop-down list, select *Cross Filter*. Configure the filter options to show *Territories without Territory-Assigned Records* and then click **OK**. Configure the filter options to show *Object equals Account*.
7. If you want to show data from territory models in *Active state only*, from the **Filters** drop-down list, select *Field Filter*. Configure the filter options to show *State equals Active* and then click **OK**.
8. Add any other fields you find useful for this report.
9. Save the report and run it.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

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

Report on Users Not Assigned to Territories

Manage user assignments to sales territories by reporting on which users haven't been assigned to territories.

-  **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.
1. Make sure your organization has a custom report type that links the Users and Territories objects. It should specify that the Users object *may or may not* have related Territories records and should make all fields on these objects available for reporting.
 2. Create your report: click the Reports tab, then click **New Report**.
 3. From the Territory Management category, select the custom report type created for this report.
 4. Click **Create**.
 5. Make sure that the Users field *Full Name* and the Territories field *Label* appear on the report. If they do not, add them.
 6. From the **Filters** drop-down list, select *Cross Filter*. Configure the filter options to show *Users without Territories* and then click **OK**.
 7. If you want to show data from territory models in *Active* state *only*, from the **Filters** drop-down list, select *Field Filter*. Configure the filter options to show *Territory Model: Label equals <name of active territory model>* and then click **OK**.

 **Important:** If you later activate a different territory model, make sure you update the territory model name variable in this report.
 8. Add any other fields you find useful for this report.
 9. Save the report and run it.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

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

Report on Territories with Assigned Users

Manage user assignments to sales territories finding out which territory models' territories have users assigned. See which assigned users belong to which territories.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Make sure your organization has a custom report type that links the Territory Models, Territories, and Users objects. It should specify that the Territory object *must* have related Users records and make all fields on these objects available for reporting.
2. Create your report: click the Reports tab, then click **New Report**.
3. From the Territory Management category, select the custom report type created for this report.
4. Click **Create**.
5. Make sure that the Territory Models field *Label*, the Territories field *Label* , and the Users field *Full Name* appear on the report. If they do not, add them.
6. If you want to show data from territory models in *Active state only*, from the *Filters* drop-down list, select *Field Filter*. Configure the filter options to show *State equals Active* and then click **OK**.
7. Add any other fields you find useful for this report.
8. Save the report and run it.
9. (Optional) Summarize information by Territory object field *Label* to show each territory with the users assigned to it.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

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

Report on Summarizable Account Fields by Territory

Gauge territory size by reporting on summarizable account data, such as annual revenue or number of employees.

-  **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.
1. Make sure your organization has a custom report type that links the Accounts and Territories objects. It should specify that the Accounts object *must have* at least one Territory object record and should make all fields on these objects available for reporting.
 2. Create your report: click the Reports tab, then click **New Report**.
 3. From the Territory Management category, select the custom report type created for this report.
 4. Click **Create**.
 5. Select *Matrix Format* for the report.
 6. From the Territories field list, select the *Label* field. Drag it to create a row grouping.
 7. From the Accounts field list, select the *Account Name* field. Drag it to create a row grouping.
 8. From the Accounts field list, select summarizable fields, such as *Annual Revenue* and *Employees*, to show those totals. Drag them into the summarizable fields area. When prompted, select the *Sum* checkbox.
 9. (Optional) Filter the report results. From the **Show** field, to filter by account ownership, select *My accounts, My team's accounts, or My territory teams' accounts*. To filter by user territory assignment, select *My territories' accounts*.
 10. Add any other fields you find useful for this report.
 11. Run the report and make sure it shows the data and the arrangement you want.
 12. Summarize information by the Territories field *Label* to total all the summarizable field values by territory.
 13. Save the report.

Maintain Enterprise Territory Management

Archive or delete territory models, and disable Enterprise Territory Management as needed.

[Archive a Territory Model](#)

Archiving a territory model deactivates it, but the model remains in your territory model list, where you can reference its associated assignment rules and the resulting account-to-territory assignments generated by the rules. You can archive a model only if it's in the Active state. After archiving a model, you can't return it to the Active state or the Planning state.

[Delete a Territory Model](#)

Delete a territory model if your team no longer actively uses the model for territory management or reference. You can't delete an active territory. The model must be in Planning or Archived state.

[Disable Enterprise Territory Management](#)

You can disable Enterprise Territory Management for your team and use another means of record sharing.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Archive a Territory Model

Archiving a territory model deactivates it, but the model remains in your territory model list, where you can reference its associated assignment rules and the resulting account-to-territory assignments generated by the rules. You can archive a model only if it's in the Active state. After archiving a model, you can't return it to the Active state or the Planning state.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

If you've enabled deferred [group membership calculation](#), we recommend suspending it to avoid issues with group membership cleanup during territory model archival. You can re-enable deferred group membership calculation after archival is completed.

1. From Setup, enter *Territory Models* in the **Quick Find** box, then select **Territory Models**.
2. Click **Edit** next to the territory model you want to archive.
3. Choose **Archiving** from the *State* drop-down.
The model state changes to *Archiving* while Salesforce processes your request. When processing is complete, the model state changes to *Archived*, and you receive a confirmation via email. This can take some time, depending on the size and complexity of your organization.

Delete a Territory Model

Delete a territory model if your team no longer actively uses the model for territory management or reference. You can't delete an active territory. The model must be in Planning or Archived state.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

Deleting a territory model also deletes all its associated territories and account assignments. You can't cancel the process or restore a deleted model. The process may take several hours, so we'll send you an email when it's complete.

1. From Setup, enter *Territory Models* in the **Quick Find** box, then select **Territory Models**.
2. Find the model in the list. Check the value in the **State** column to make sure that the model is in the *Planning* or *Archived* state.
3. Click **Del**.
4. Later, check your email for confirmation that the deletion process is complete.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To archive a territory model:

- Manage Territories

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud



USER PERMISSIONS

To delete a territory model:

- Manage Territories

Disable Enterprise Territory Management

You can disable Enterprise Territory Management for your team and use another means of record sharing.

-  **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.
 -  **Important:** If you disable Enterprise Territory Management, your users lose record access that's based on territory assignments, and your organization no longer has access to territory management data. If you re-enable Enterprise Territory Management, you may lose data that had previously been available through the feature.
1. If you haven't already, [archive your active territory model](#) before disabling Enterprise Territory Management.
 2. From Setup, enter *Territories* in the Quick Find box, and then select the territory settings.
 3. Click **Disable Territory Management 2.0**.

Enterprise Territory Management Allocations

Model, territory, and assignment allocations for Enterprise Territory Management.

Territory Model Allocations

Your Salesforce edition determines the number of territory models you can create in production and sandbox. This allocation includes models created by cloning.

Edition	Number of Models in Production	Number of Models in Sandbox
Developer	4	4
Enterprise	2	2
Performance	4	4
Unlimited	4	4

Territory Default Allocations

By default, each territory model can have up to 1,000 territories.

Assignment Rule Allocations

Territories can have up to 15 assignment rules each.

Assigned User Allocation

You can assign up to approximately 1,950 users to a territory via the UI.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To disable Enterprise Territory Management:

- Customize Application

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Manage Territories with Enterprise Territory Management

Get to know your company's territory model.

[Explore Your Company's Territory Model](#)

A territory model includes a hierarchy and a list view of parent and child territories. If you manage, administer, or belong to a sales territory, explore your territory model to understand how sales efforts are organized. Drill down to get important details on individual territories, including assigned accounts.

[Identify an Account's Sales Territories](#)

Find out which sales territory an account belongs to.

[View a List of the Accounts in Your Territories](#)

Create a list view that shows you which accounts are assigned to the territories you cover.

Explore Your Company's Territory Model

A territory model includes a hierarchy and a list view of parent and child territories. If you manage, administer, or belong to a sales territory, explore your territory model to understand how sales efforts are organized. Drill down to get important details on individual territories, including assigned accounts.



Note: This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. From Setup, enter *Territory Models* in the **Quick Find** box, then select **Territory Models**. The list view displays your org's active territory model. Click the model's label if you want to view its detail page. Along with other details, this page tells you the last time account assignment rules were run to realign the territory.
2. From the list view, click the model's **View Hierarchy** link.
3. Click **Tree View** to expand and explore the hierarchy tree.
4. Within the hierarchy, click a territory label to view its detail page, where you can identify its territory type, assigned users and their access levels, assignment rules, and more.
5. From the top of the page, navigate back to the model's territory hierarchy and check out its other territories.

SEE ALSO:

[Territory Hierarchy](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To view an active territory model:

- View Setup and Configuration

Identify an Account's Sales Territories

Find out which sales territory an account belongs to.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

1. Open the account record.
2. View the account's territories on the Assigned Territories related list.

SEE ALSO:

[View a List of the Accounts in Your Territories](#)

View a List of the Accounts in Your Territories

Create a list view that shows you which accounts are assigned to the territories you cover.

 **Note:** This information applies to Enterprise Territory Management only, not to previous versions of Territory Management.

The *My Territories* filter shows accounts that belong to the territories you're assigned to. The *My Territory Teams* filter shows accounts for territories you're assigned to *and their descendant territories* (if any). You can create these list views in Salesforce Classic only, but you can view them in both Lightning Experience and Salesforce Classic.

1. If you're using Lightning Experience, switch to Salesforce Classic.
2. On the Accounts tab, click **Create New View** next to the view menu.
3. Give the view a name, then specify *My Territories* or *My Territory Teams* in the filter criteria. Add other filters if you need them.
4. Choose other fields you want to filter on, then select *Account Name* and any other fields you want the list view to show.
5. Click **Save**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To identify an account's sales territory:

- Read on accounts

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To view territories in all your organization's territory models:

- Manage Territories

To view territories in your organization's *Active* territory model:

- View Setup and Configuration

To view accounts:

- Read on Accounts

Opportunity Teams and Opportunity Splits

Set up opportunity teams to make it easier for sales reps to track and collaborate on specific opportunities. Opportunity splits lets you share revenue from a Close-Won opportunity among team members.

[Opportunity Teams](#)

Opportunity teams show who's working on the opportunity and what each team member's role is, making it easy to collaborate with your colleagues.

[Opportunity Splits](#)

Opportunity splitting lets you share revenue from an opportunity with your team members. Team members working on an opportunity can roll their individual sales credits into quota and pipeline reports for the entire team.

Opportunity Teams

Opportunity teams show who's working on the opportunity and what each team member's role is, making it easy to collaborate with your colleagues.

Opportunity teams shows who's working on the opportunity and what each team member's role is. You can grant your opportunity team members special access to the opportunity and its related records, making it easier for everyone to work together.

Using opportunity teams makes it easier for you to track the work of a team, too. In opportunity reports, filter opportunities by the opportunity teams that you're a member of. When creating or editing a custom list view for opportunities in Salesforce Classic, select the My Opportunity Teams filter.

EDITIONS

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

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

[Set Up Opportunity Teams](#)

Turn on Opportunity Teams and customize them for your users.

[Manage Opportunity Teams](#)

Use opportunity teams to enhance how your team works together to close opportunities.

[Things to Know about Opportunity Teams](#)

Review guidelines and other supplemental information about opportunity teams.

Set Up Opportunity Teams

Turn on Opportunity Teams and customize them for your users.

[Enable Team Selling](#)

Help your reps collaborate on selling opportunities by turning on Opportunity Teams.

[Considerations for Customizing Opportunity Teams](#)

Make opportunity teams work better for your business by customizing opportunity team roles, page layouts, and more. Before you do, consider these key points.

[Customize Opportunity Team Roles](#)

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

Considerations for Disabling Team Selling

Before you disable team selling, consider the following key points.

Enable Team Selling

Help your reps collaborate on selling opportunities by turning on Opportunity Teams.

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

Considerations for Customizing Opportunity Teams

Make opportunity teams work better for your business by customizing opportunity team roles, page layouts, and more. Before you do, consider these key points.

- Opportunity teams are available in Lightning Experience, but you must switch to Salesforce Classic to use some related features, such as Opportunity Splits. For more information, review the Lightning Experience limitations for Sales features.
- You can create a maximum of 50 custom fields for an opportunity team.
- If you delete a custom field, filters that use the custom field are also deleted, and the result of assignment or escalation rules that rely on the custom field's data can change.
- To display opportunity team member information on a parent page, you must link the team member and the parent. For example, to display team member information on the related account detail page, add a custom lookup field called Account to the Opportunity Team editor, and then set this field to the parent account for each opportunity team member.
- You can't create a lookup from an object, such as an account, to an opportunity team member.
- Validation rules and Apex triggers aren't supported when a user adds his or her default opportunity team on an opportunity.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable team selling:

- Customize Application

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Customize Opportunity Team Roles

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



Warning:

- Leave the Opportunity Owner unchanged. It's needed for Opportunity Splits.
 - Opportunity teams share roles with account teams. If you remove an opportunity team role, that role is no longer listed as an account team role.
1. From Setup, enter *Team Roles* in the **Quick Find** box, then select **Team Roles** under Opportunity Teams.
 2. Edit the picklist values for team roles as needed.
 3. Save your changes.
 4. To update a changed picklist value in all your files, enter *Replace Team Roles* in the **Quick Find** box, then select **Replace Team Role**.

Considerations for Disabling Team Selling

Before you disable team selling, consider the following key points.

- Disabling team selling permanently removes all opportunity teams from all opportunities and deletes default opportunity teams.
- If Opportunity Splits is enabled, you can't disable team selling.
- If team members are referenced in Apex, you can't disable team selling.
- Before you disable team selling, do the following.
 - Disable Opportunity Splits. This action permanently deletes all split data from your Salesforce org.
 - Delete all custom fields, custom buttons and links, page layouts, validation rules, workflow rules, and Apex triggers that you've added to opportunity teams.
 - Delete all custom reports that include opportunity team information.
 - Uninstall any Apex packages that use opportunity teams.
- To disable team selling:
 - You need the Customize Application permission.
 - Access Opportunity Team Settings. From Setup, enter *Opportunity Team Settings* in the **Quick Find** box, then select **Opportunity Team Settings**.

Manage Opportunity Teams

Use opportunity teams to enhance how your team works together to close opportunities.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To set up team roles:

- Customize Application

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

[Guidelines for Setting Up and Adding a Default Opportunity Team](#)

Save time by setting up a default opportunity team—a group of coworkers who you typically work with on opportunities. Then add the team to opportunities that you own. If you're working with a default opportunity team, refer to these guidelines for additional information.

[Guidelines for Editing Members of an Opportunity Team](#)

Keep the details about your opportunity team members up-to-date by changing their access level, team role, and more. If you're editing team members, refer to these guidelines for information.

[Considerations for Deleting Members from an Opportunity Team](#)

Keep your opportunity teams up-to-date by deleting members who are no longer part of a team. If Opportunity Splits is enabled, consider the following before you delete a team member.

[Update Team Members on Multiple Records](#)

If your Salesforce org uses account teams or opportunity teams, keep your records up-to-date the easy way. Use the mass team reassignment wizards to add, remove, and replace team members on multiple records at the same time.

[Considerations for Updating Team Members on Multiple Records](#)

Before you use a mass team reassignment wizard, consider a few key points.

Guidelines for Setting Up and Adding a Default Opportunity Team

Save time by setting up a default opportunity team—a group of coworkers who you typically work with on opportunities. Then add the team to opportunities that you own. If you're working with a default opportunity team, refer to these guidelines for additional information.

- To set up a default opportunity team, access Advanced User Details in your personal settings.
- While you're defining your default opportunity team, you can choose to automatically add it to all your open opportunities. If you don't choose this option, you add the default team from the Opportunity Team related list of your opportunities.
- Clicking **Add Default Team** adds the default team of the opportunity owner, not of the user who clicks the button.
- Salesforce admins and users above you in the role hierarchy can add your default opportunity team to opportunities that you own.

Guidelines for Editing Members of an Opportunity Team

Keep the details about your opportunity team members up-to-date by changing their access level, team role, and more. If you're editing team members, refer to these guidelines for information.

- If the team member that you need to update doesn't appear in the Opportunity Team related list, view the full list.
- You edit opportunity team members on the detail page of the opportunity team member that you need to update.
- When editing inactive users with assigned split percentages, you can edit only the split-related fields.
- If your Salesforce admin defined custom fields, you'll see them when you edit a team member, even if your admin didn't add them to the Add Opportunity Team Members page.
- The member's opportunity access level can't be less than your Salesforce org's default opportunity sharing access.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Considerations for Deleting Members from an Opportunity Team

Keep your opportunity teams up-to-date by deleting members who are no longer part of a team. If Opportunity Splits is enabled, consider the following before you delete a team member.

- If the team member that you want to delete is assigned a split percentage greater than zero, reassign the split before you delete the member.
- You can't delete the opportunity owner from the opportunity team. To remove this member from splits calculations, assign the member a split percentage of zero, or transfer ownership of the opportunity.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To remove team members:

- Read on users

AND

Edit on opportunities

AND

Owner of the opportunity, or above the owner in your organization's role hierarchy

To view an opportunity for which you're a team member:

- Read on the opportunity

Update Team Members on Multiple Records

If your Salesforce org uses account teams or opportunity teams, keep your records up-to-date the easy way. Use the mass team reassignment wizards to add, remove, and replace team members on multiple records at the same time.

1. From Setup, enter *Mass Reassign* in the *Quick Find* box, then select **Mass Reassign Account Teams** or **Mass Reassign Opportunity Teams**.

The Step 1 page of the wizard appears.

2. Complete the wizard as instructed.
3. Review the number of changed records, and then click **Done** to exit the wizard.

Considerations for Updating Team Members on Multiple Records

Before you use a mass team reassignment wizard, consider a few key points.

- If you don't see the **Mass Reassign Account Teams** or **Mass Reassign Opportunity Teams** option in Setup, go to the Accounts or Opportunities page, and then click the option in the Tools section.
- If Opportunity Splits is enabled, and you remove a team member assigned to a split that must total 100%, the removed member's percentage transfers to the opportunity owner. You can't remove the opportunity owner.
- When you're selecting the team members to change in records:
 - For account teams, select the appropriate account, contact, case, and opportunity access.
 - For opportunity teams, select the appropriate opportunity access. Then complete any custom fields that have been defined and added to the opportunity team page layout.

Things to Know about Opportunity Teams

Review guidelines and other supplemental information about opportunity teams.

[Guidelines for Using Opportunity Teams](#)

An opportunity team is a group of Salesforce users who work together on a sales opportunity. If you're using opportunity teams, refer to these guidelines.

[Opportunity Team Fields](#)

Opportunity Team data is stored in these standard fields.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To mass update team members:

- Use Team Reassignment Wizards

Guidelines for Using Opportunity Teams

An opportunity team is a group of Salesforce users who work together on a sales opportunity. If you're using opportunity teams, refer to these guidelines.

- 📌 **Note:** Opportunity teams aren't the same as account teams, although they share a set of available team member roles.
- Set up opportunity teams for opportunities that are owned by you or someone below you in the role hierarchy.
- Set up a default opportunity team to include the users who you normally work with on opportunities. You can choose to add your default opportunity team to all your opportunities automatically.
- When you set up an opportunity team, you:
 - Add team members.
 - Specify each member's role on the opportunity, such as Executive Sponsor.
 - Specify each team member's level of access to the opportunity: read/write access or read-only access.
- When the organization-wide default for accounts and opportunities is set to private, you can manually share records to give access to other users. When a user has access to an account through manual sharing, the user also gets read-only access to the account's opportunities. If a user has access to the account's opportunities as part of an opportunity team, then manually removing the user's access to the account automatically removes the user from any related opportunity teams.
- Changes that you make to the opportunity team on an opportunity don't affect your default opportunity team or the opportunity teams on your other opportunities.
- If your Salesforce admin has enabled Opportunity Splits, you can split credit for an opportunity among members of an opportunity team.
- Adding, editing, or deleting opportunity team members requires read/write access on the opportunity.
- You can't use opportunity teams for private opportunities.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

Opportunity Splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Opportunity Team Fields

Opportunity Team data is stored in these standard fields.

Field	Description
Opportunity Access	The level of access that a team member has to the opportunity. The access level can be read/write or read only, but it can't be less than your Salesforce org's default opportunity sharing access.
Team Role	The role that the team member plays for the opportunity, such as Account Manager.
User	The user who's listed as part of the team.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

Opportunity Splits

Opportunity splitting lets you share revenue from an opportunity with your team members. Team members working on an opportunity can roll their individual sales credits into quota and pipeline reports for the entire team.

 [Watch a Demo \(Salesforce Classic\)](#) (1:44 minutes)

If your Salesforce admin has enabled Opportunity Splits, and you're the opportunity owner or above the owner in the organization hierarchy, you can add and adjust splits for the opportunity.

- To credit team members who are directly responsible for opportunity revenue, use *revenue* splits, which always total 100% of the opportunity amount.
- To credit supporting team members, use *overlay* splits, which can total any percentage of the opportunity amount, including percentages over 100%.

Your Salesforce org's `Split on Opportunity - Amount` field comes with one revenue split and one overlay split. If custom split types are enabled for your org, your Salesforce admin can create three more split types. Your admin decides which types of splits always total 100%. To have custom split types enabled for your org, ask your admin to contact Salesforce.

Your admin can also create custom fields for opportunity splits, allowing you to better track and store information about splits that you create for team members.

 **Note:** Splits can't be rolled up to sales territories.

[Set Up Opportunity Splits](#)

Turn on Opportunity Splits and customize them for your users.

[Manage Opportunity Splits](#)

Share revenue from opportunities with your team members.

Set Up Opportunity Splits

Turn on Opportunity Splits and customize them for your users.

[Enable Opportunity Splits](#)

Make it easy for your sales reps to collaborate on opportunities and share opportunity revenue with team members.

[Considerations for Enabling Opportunity Splits](#)

Before you enable Opportunity Splits, consider these key points.

[Create Custom Opportunity Split Types](#)

To better reflect your business operations, create custom opportunity split types on opportunity currency fields. Create up to three types to use in addition to revenue and overlay splits. Then, specify whether each type always totals 100%.

[Considerations for Removing Opportunity Split Types](#)

Typically, you *deactivate* an opportunity split type when you have five split types (the maximum) and you need another. Or you *delete* a seldom-used type to reduce storage. Before you deactivate or delete an opportunity split type, consider these key points.

[Considerations for Editing Multi-Line Layouts for Opportunity Splits](#)

Before you customize the fields that Salesforce displays when sales reps edit opportunity splits, consider these key points.

[Considerations for Disabling Opportunity Splits](#)

If your Salesforce org isn't using Opportunity Splits, you can disable the feature. Before you do so, consider these key points.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

Enable Opportunity Splits

Make it easy for your sales reps to collaborate on opportunities and share opportunity revenue with team members.

1. From Setup, enter *Opportunity Splits* in the Quick Find box, then select **Settings**.
2. Click **Set up Opportunity Splits**.
3. To better reflect your business process, do any of the following.
 - Rename or deactivate the default revenue and overlay splits, which are based on the *Opportunity - Amount* field.
 - Click **Add a new split type** to split another currency field and specify whether splits on that field must total 100%.
4. Save your changes.
5. Select the page layouts to display the Opportunity Splits related list.
6. To ensure that users with customized page layouts see the related list, select `Add to users' customized related lists`.
7. Save your changes.
8. Click **Let users add members to opportunity teams while editing splits** to enable quicker changes to those teams.

Considerations for Enabling Opportunity Splits

Before you enable Opportunity Splits, consider these key points.

General considerations

- You must enable team selling before you can enable Opportunity Splits.
- Enabling Opportunity Splits changes the opportunity records in your Salesforce org. Here's what happens.
 - A script temporarily disables triggers, workflows, and validation rules for opportunity team records, mass reassignment of opportunity team members, and mass transfer of accounts and opportunities.
 - The opportunity owner is included on each opportunity team. Because the Opportunity Owner role is essential for splits, you can't remove it.
 - If you enable split types that total 100%, new opportunity split records include a default entry for the owner. This owner initially receives 100% of the split amount. (These additional records require more data storage. To see how this extra storage requirement affects your Salesforce org, search for "Monitoring Storage Resources" in the Salesforce Help.)
- You can have up to five split types, including inactive split types. To rename, temporarily deactivate, or permanently delete split types, return to the Opportunity Splits setup page, and then click **Edit Split Types**. Deleting split types deletes splits data. You can't delete the default split types.
- If **Let users add members to opportunity teams while editing splits** isn't selected, users must be added to an opportunity team before they can be added to an opportunity split.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable opportunity splits:

- **Modify All Data**

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

Available time

Enabling Opportunity Splits starts a process that sets up splits on every opportunity in your Salesforce org. Depending on the number of opportunity records, this process can take hours. You can still work with Salesforce while the process is ongoing. Automated email notifications keep you up-to-date on the script's status. Consider running the process overnight.

Inactive currencies

If your Salesforce org has inactive currencies that have been active in the past, you probably have opportunity records that use those currencies. Those records are part of the split enablement process, but the currency's inactive status causes the process to fail. To help prevent a failure, or fix a failure that occurs:

- Make the inactive currency active during the splits enablement. (You can make it inactive again after the process is finished.)
- Delete the opportunities with the inactive currency. This solution works best when your Salesforce org has only a few opportunities with an inactive currency and you don't need them for reporting or historical purposes.

Inactive users

Similar to inactive currencies, if your Salesforce org has inactive users that worked with opportunities, you probably have opportunity records still owned by those users. The split enablement process accesses those records, but the users' inactive status causes the process to fail. To help prevent a failure, or fix a failure that occurs:

- Make the inactive users active during the splits enablement. (You can make them inactive again after the process is finished.)
- Delete all opportunities owned by inactive users. This solution works best when your Salesforce org has only a few opportunities owned by inactive users and you don't need them for reporting or historical purposes.
- Temporarily allow editing of inactive users in your Salesforce org.

 **Note:** Turning on editing of inactive users could alter archived data. If you are enabling this permission only to turn on opportunity splits, we recommend limiting who can use it, and turning it back off again when you're done.


1. From Setup, enter *User Interface* in the Quick Find box, then select **User Interface**.
2. Select **Enable "Set Audit Fields upon Record Creation" and "Update Records with Inactive Owners" User Permissions** and save your changes.
3. Enable **Update Records with Inactive Owners** for profiles or permission sets.

Mass operations in progress

If you're running a mass operation, such as Mass Transfer or Mass Reassign Team Member, enabling Opportunity Splits at the same time can cause the enablement to fail. Make sure that all mass operations are finished before you start to enable Opportunity Splits.

Create Custom Opportunity Split Types

To better reflect your business operations, create custom opportunity split types on opportunity currency fields. Create up to three types to use in addition to revenue and overlay splits. Then, specify whether each type always totals 100%.

 **Note:** You can split most currency fields created on opportunities, including custom currency fields and roll-up summary fields, but not formula currency fields.

1. Contact Salesforce to have custom split types enabled for your Salesforce org.
Changes to opportunity split types are completed by a background process. You're notified by email when the process is finished. We recommend not editing splits on opportunities until changes are complete.
2. From Setup, enter *Opportunity Splits* in the **Quick Find** box, select **Settings**, and then click **Edit Split Types**.
3. Click **+ Add a new split type**.
4. Define the settings as needed.
5. Save your changes.

Considerations for Removing Opportunity Split Types

Typically, you *deactivate* an opportunity split type when you have five split types (the maximum) and you need another. Or you *delete* a seldom-used type to reduce storage. Before you deactivate or delete an opportunity split type, consider these key points.

- Deactivating a split type removes it from the Salesforce interface while saving the underlying data. That way, you can reactivate it later.
- Deleting a split type permanently removes all related data.
- To deactivate or delete a split type:
 - You need the “Customize Application” permission.
 - Access Opportunity Splits Settings.
- If your Salesforce org contains many opportunities, the script that deletes split types can take several hours.

Considerations for Editing Multi-Line Layouts for Opportunity Splits

Before you customize the fields that Salesforce displays when sales reps edit opportunity splits, consider these key points.

- To edit layouts, you need the “Customize Application” permission.
- You can't add rich text fields or multi-select picklists to the multi-line layout for opportunity splits.
- You edit rich text fields and multi-select picklists on the opportunity split detail page.
- In Lightning Experience, [considerations that apply to editing inline in a list view](#) also apply to editing opportunity splits in the multi-line layout.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To create custom split types for opportunities:

- Customize Application and Modify All Data

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

Considerations for Disabling Opportunity Splits

If your Salesforce org isn't using Opportunity Splits, you can disable the feature. Before you do so, consider these key points.

- Disabling Opportunity Splits is irreversible. You can't retrieve lost splits data.
- If you disable Opportunity Splits, here's what happens.
 - Splits on all opportunities in your org are deleted.
 - Split reports are deleted.
 - Custom reports that were built using split report templates still appear on the Reports tab, but you can't access them.
- To disable Opportunity Splits:
 - You need the "Customize Application" permission.
 - You access Opportunity Splits Settings.
- If your org contains many opportunities, the script that disables Opportunity Splits can take several hours to finish.

EDITIONS

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

Available in: **Performance** and **Developer** Editions

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

Manage Opportunity Splits

Share revenue from opportunities with your team members.

[Create Opportunity Splits](#)


Add and adjust splits to share revenue from opportunities with your team members.

[Considerations for Creating Opportunity Splits](#)

If you're creating opportunity splits to share opportunity revenue with coworkers, review these guidelines for information.

Create Opportunity Splits

Add and adjust splits to share revenue from opportunities with your team members.

1. In the Opportunity Splits related list of an opportunity, click **Edit Opportunity Splits**.
2. Complete the fields as needed.
3. To remove a team member from the split, click  or **Del** next to the team member's name.
4. Save your changes.

Considerations for Creating Opportunity Splits

If you're creating opportunity splits to share opportunity revenue with coworkers, review these guidelines for information.

- The opportunity owner is automatically included in the opportunity team and initially assigned 100% of the split types that always total 100%.
- If you can't add a team member when you're editing the opportunity split, add the member in the Opportunity Team related list on the main opportunity page. (To add members while editing splits, contact your Salesforce admin.)
- If you don't see splits on a field, ask your Salesforce admin to check your field-level security limits.
- To determine whether a split type always totals 100%, look for "must total 100%" in the description of the split.
- Split percentages are limited to two decimal places. If you enter a monetary amount that requires a split percentage with more than two, the amount is automatically rounded.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To add splits for opportunity team members:

- Edit on opportunities

AND

Owner of opportunity record or above owner in organization hierarchy

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Performance** and **Developer** Editions

Available in: **Enterprise** and **Unlimited** Editions with the Sales Cloud

Improve Performance with Work.com

Work.com is a suite of sales-management and service-management tools that help managers and teams learn faster and perform better. This includes recognition tied to real rewards, detailed goals and real-time coaching, and full-featured performance reviews.

[Set Up Work.com](#)

Work.com is a suite of sales-management and service-management tools that help managers and teams learn faster and perform better.

[Configure Work.com](#)

Configure Work.com to meet the needs of your business.

[Manage Work.com](#)

Use these Work.com features to track, manage, and improve your performance, thank and recognize coworkers, and more..

Set Up Work.com

Work.com is a suite of sales-management and service-management tools that help managers and teams learn faster and perform better.

Work.com has various features to help your sales and service teams. This includes recognition tied to real rewards, detailed goals and real-time coaching, and full-featured performance reviews.

After you receive your Work.com licenses, set up Work.com..

1. [Considerations for Setting Up Work.com](#)
Plan out your implementation before enabling Work.com in your organization.
2. [Assign a Work.com Administrator](#)
Before enabling Work.com in your organization, you must assign a Work.com user feature license to the person who will be the system administrator and responsible for setting up Work.com for your organization.
3. [Enable Work.com Features](#)
Administrators can enable preferences for Work.com features on the Work.com Settings page.
4. [Assign Work.com Licenses](#)
After granting access to Work.com features with permission sets or profiles, assign users a Work.com license.
5. [Configure Work.com Features](#)
Most Work.com features require the Work.com add-on, but some are freely available to Sales Cloud users.
6. [Configure Work.com Reports](#)
Use reports and dashboards to see how Work.com features are being used in your organization.

EDITIONS

Available in: Salesforce Classic

Work.com is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

EDITIONS

Available in: Salesforce Classic

Work.com is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

Considerations for Setting Up Work.com

USER PERMISSIONS

To enable Work.com features:	Customize Application
To assign permission sets:	Assign Permission Sets
To assign profiles:	Manage Users
To set field-level security:	Manage Profiles and Permission Sets AND Customize Application
To view the Calibration tab:	Enable Work.com Calibration

EDITIONS

Available in: Salesforce Classic

Work.com is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

Plan out your implementation before enabling Work.com in your organization.

Administrators should make the decisions outlined in the [Business Decision Checklist](#) before enabling Work.com.

Before beginning the implementation process, Salesforce must enable Work.com permissions and provision Work.com licenses for your organization. Your Salesforce contact will coordinate this with you, but you can check if your organization has available Work.com licenses. In Setup, enter *Company Information* in the **Quick Find** box, then select **Company Information**, and check for Work.com User under **Feature Licenses**.



Note: We recommend that you enable Chatter regardless of the edition your org is using. Many Work.com features use the Chatter feed to notify and interact with users. To confirm that Chatter is enabled, from Setup, enter *Chatter Settings* in the **Quick Find** box, then select **Chatter Settings**, and verify that Chatter Settings is enabled.

SEE ALSO:

[Assign a Work.com Administrator](#)

Assign a Work.com Administrator

Before enabling Work.com in your organization, you must assign a Work.com user feature license to the person who will be the system administrator and responsible for setting up Work.com for your organization.

If you're the administrator setting up Work.com, assign the license to yourself.

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Find the name of the person who will be the system administrator and click **Edit** next to their name.
3. In the right-hand column, select the **Work.com User** checkbox.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign a Work.com administrator:

- Customize Application

We strongly recommend that you create a separate Work.com Administrator profile with limited access because the standard Salesforce System Administrator profile is so powerful. For more information, see the [Create Your Work.com Administrator Profile](#).

SEE ALSO:

[Enable Work.com Features](#)

Enable Work.com Features

Administrators can enable preferences for Work.com features on the Work.com Settings page.

All the settings except for Thanks Settings and Skills Settings require a Work.com license.

1. From Setup, enter *Work.com Settings* in the Quick Find box, then select **Work.com Settings**.
2. Select the Work.com features you want to enable:

For users that purchased Work.com prior to the Spring '15 release, the features that appear differ depending on whether you have add-on licenses to **Work.com Motivate**, **Work.com Align**, or **Work.com Perform**.

Feature	Section	Description
Enable Thanks	Thanks Settings	Enable Thanks to allow users to recognize others with thanks badges on the Chatter feed. If you disable this setting, users no longer see the Thanks action in the Chatter publisher. However, they can still see previously created Thanks posts.
Restrict Custom Badge Creators	Thanks Settings	By default, all users can create custom badges. This setting restricts badge creation to users that have the "Create" permission on the Reward object.
Enable Rewards	Recognition Settings	Enable Rewards to tie tangible rewards to badges. Reward creators can upload gift codes to create Reward funds. See the "Reward Funds" topic for more information about creating rewards.
Enable Manager Groups for Coaching	Coaching Settings	Enable manager groups to give managers access to the coaching spaces of the users that report to them. To enable this setting, the Manager Groups setting must first be enabled in Setup, under Sharing Settings .
Enable Manager Groups for Goals	Goal Settings	Enable manager groups to give managers access to the goals of the users that report to them. To enable this setting, the Manager Groups setting must first be enabled in Setup, under Sharing Settings .

EDITIONS



Available in: Salesforce Classic

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

USER PERMISSIONS

To enable Work.com features:

- Customize Application

Feature	Section	Description
Enable Calibration	Perform Settings	<p>Enable Calibration to see and update performance across teams and individuals.</p> <p> Note: For Performance Edition organizations, Calibration is not available for the following profiles: Contract Manager, Marketing User, Read Only, and Solution Manager.</p>
Enable Skills	Skills Settings	<p>Enable Skills to allow users to add skills to their profiles and endorse the skills of other users. Enabling this setting replaces the Knowledgeable About widget on Chatter profiles.</p>
Restrict Skill and Endorsement Editing to Record Detail Pages	Skills Settings	<p>Disables inline editing of skills and endorsements on Chatter profiles, and restricts editing to record detail pages. Recommended if you have customized these objects with custom required fields.</p> <p> Note: Don't enable this setting if you want to use skills in Chatter profiles.</p>
Enable Automatic Skill Feed Posts	Skills Settings	<p>Enable to automatically create Chatter feed posts when a user adds a new skill.</p>
Enable Suggested Skills	Skills Settings	<p>Enable Suggested Skills to have the skills widget suggest skills for users to add based on their Chatter Topics activity.</p>

3. Click **Save**.

[Assign Work.com Permission Sets](#)

Assign permission sets with Work.com access to your users from Setup.

[Assign Work.com Profiles](#)

Assign profiles with Work.com access to your users from Setup.

SEE ALSO:

[Work.com Feature Access](#)


Assign Work.com Permission Sets

Assign permission sets with Work.com access to your users from Setup.

Before you can assign permission sets to your users, you must create permission sets with Work.com access. Refer to [Recommended Work.com Permission Sets](#) for more information.

1. From Setup, enter *users* in the **Quick Find** box, then select **Users**.
2. Select a user.
3. In the Permission Set Assignments related list, click **Edit Assignments**.
4. To assign a permission set, select it from the Available Permission Sets box and click **Add**. To remove a permission set assignment, select it from the Enabled Permission Sets box and click **Remove**.

You can also assign permission sets to many users at the same time. For more information, see “Assign a Permission Set to Multiple Users” in the Salesforce Help.

 **Note:** Some permissions require users to have a permission set license before you can grant the permissions. For example, if you add the “Use Identity Connect” user permission to the Identity permission set, you can assign only users with the Identity Connect permission set license to the permission set.

5. Click **Save**.

[Recommended Work.com Permission Sets](#)

Create different permission sets for different types of Work.com users.

Recommended Work.com Permission Sets

Create different permission sets for different types of Work.com users.








Create new permission sets for each type of Work.com user.

Use the tables below to assign the appropriate object settings and system permissions for each permission set.

Standard User

The Standard User permission set gives a user all the basic Work.com functionality.

Table 1: Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Available 						
	Visible 						
Coaching (object)							
Coaching (tab)	Available 						
	Visible 						

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign permission sets:

- Assign Permission Sets

EDITIONS

Available in: Salesforce Classic

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

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Documents		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Endorsements		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Feedback (object)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Feedback Questions		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Feedback Question Sets		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Feedback Requests (and Feedback tab)	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Goal Links		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Goals (object)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Goals (Completion Date field)		<input checked="" type="checkbox"/>					
Goals (Key Company Goal field)		<input checked="" type="checkbox"/>					
Goals (tab)	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>						
Metric Data Links		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Metrics		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Performance Cycles	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
Recognition (tab)	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>						
Reward Funds	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
Reward Fund Types	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
Rewards		<input checked="" type="checkbox"/>					

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Skills	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Skill Users		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Table 2: Standard User System Permissions

System Permissions	Enabled
API Enabled	<input checked="" type="checkbox"/>
Edit Events	<input checked="" type="checkbox"/>
Edit Tasks	<input checked="" type="checkbox"/>

Performance Cycle Manager



The Performance Cycle Manager permission set is typically used for creating and deploying performance summaries to employees.

 **Note:** This permission set should be assigned in addition to the Standard User permission set.

Table 3: Performance Cycle Manager Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Calibration (tab)	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>						
Feedback (object)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedback Questions		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedback Question Sets		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedback Requests (and Feedback tab)	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Performance Cycles	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Table 4: Performance Cycle Manager System Permissions

System Permissions	Enabled
Enable Work.com Calibration	
View Setup and Configuration	



Custom Badge Creator

The Custom Badge Creator permission set gives users the ability to create custom badges.

 **Note:**

- If the Restrict Custom Badge Creators preference is enabled, users must also have Create enabled on the Reward object.
- This permission set should be assigned in addition to the Standard User permission set.

Table 5: Custom Badge Creator System Permissions

System Permissions	Enabled
Create custom Badge Definitions	
Moderate Chatter	

Reward Creator

The Reward Creator permission set is for users who should have the ability to link badges to tangible rewards.

 **Note:** This permission set should be assigned in addition to the Standard User permission set.

Table 6: Reward Creator Object Settings













Object Name	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Reward Funds						
Reward Fund Types						
Rewards						

Table 7: Reward Creator System Permissions

System Permissions	Enabled
Create custom Badge Definitions	

Work.com Administrator

The Work.com Administrator permission set gives a user full administrative access to Work.com objects and features. This permission set should be assigned instead of the Standard User permission set.

Table 8: Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>						
Calibration (tab)	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>						
Coaching (object)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Coaching (tab)	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>						
Documents		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Endorsements		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedback (object)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedback Questions		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedback Question Sets		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedback Requests (and Feedback tab)	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Goal Links		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Goals (object)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Goals (Completion Date field)		<input checked="" type="checkbox"/>					
Goals (Key Company Goal field)		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			
Goals (tab)	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>						
Metric Data Links		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Metrics		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>















































Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Performance Cycles	Available  Visible 						
Recognition (tab)	Available  Visible 						
Reward Funds	Available  Visible 						
Reward Fund Types	Available  Visible 						
Rewards							
Skills	Available  Visible 						
Skill Users							

Table 9: Work.com Administrator System Permissions

System Permissions	Enabled
API Enabled	
Create custom Badge Definitions	
Edit Events	
Edit Tasks	
Enable Work.com Calibration	
Moderate Chatter	
View Setup and Configuration	

SEE ALSO:

[Work.com Feature Access](#)[Assign Work.com Permission Sets](#)

Assign Work.com Profiles

Assign profiles with Work.com access to your users from Setup.

Before you can assign profiles to your users, you must create profiles with Work.com access. Refer to [Recommended Work.com Profiles](#) for more information.

1. From Setup, enter *users* in the **Quick Find** box, then select **Users**.
2. Click **Edit** next to a user.
3. From the **Profile** drop-down, select the profile you would like to assign.
4. Click **Save**.


[Recommended Work.com Profiles](#)

Create different profiles for different types of Work.com users.

Recommended Work.com Profiles

Create different profiles for different types of Work.com users.

Create a new profile for each type of Work.com user. For more information about creating profiles, see either [Work in the Original Profile Interface](#) or [Work in the Enhanced Profile User Interface Page](#) depending on whether you have the Enable Enhanced Profile User Interface preference turned on.















 **Note:** Professional Edition organizations will need to grant access through existing profiles. The Work.com Only User, Chatter Only User, and Standard User profiles grant basic access to Work.com objects. The System Administrator profile grants users full administrative access to all Work.com features.

Use the tables below to assign the appropriate object settings and system permissions for each profile.

Standard User

The Standard User profile gives a user all the basic Work.com functionality.

Table 10: Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Coaching (object)							
Coaching (tab)	Default On						
Documents							
Endorsements							
Feedback (object)							

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign profiles:

- Manage Users

EDITIONS

Available in: Salesforce Classic

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

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Feedback Questions		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Feedback Question Sets		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Feedback Requests (and Feedback tab)	Default On	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Goal Links		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Goals (object)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Goals (Completion Date field)		<input checked="" type="checkbox"/>					
Goals (Key Company Goal field)		<input checked="" type="checkbox"/>					
Goals (tab)	Default On						
Metric Data Link		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Metrics		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Performance Cycles	Default On	<input checked="" type="checkbox"/>					
Recognition (tab)	Default On						
Reward Funds	Default On	<input checked="" type="checkbox"/>					
Reward Fund Types	Default On	<input checked="" type="checkbox"/>					
Rewards		<input checked="" type="checkbox"/>					
Skills	Default On	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Skill Users		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Table 11: Standard User System Permissions

System Permissions	Enabled
API Enabled	<input checked="" type="checkbox"/>
Edit Events	<input checked="" type="checkbox"/>
Edit Tasks	<input checked="" type="checkbox"/>

Performance Cycle Manager

The Performance Cycle Manager profile is typically used for creating and deploying performance summaries to employees.

Table 12: Performance Cycle Manager Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Calibration (tab)	Default On						
Coaching (object)		✓	✓	✓	✓		
Coaching (tab)	Default On						
Documents		✓	✓	✓			
Endorsements		✓	✓	✓	✓		
Feedback (object)		✓	✓	✓	✓	✓	✓
Feedback Questions		✓	✓	✓	✓	✓	✓
Feedback Question Sets		✓	✓	✓	✓	✓	✓
Feedback Requests (and Feedback tab)	Default On	✓	✓	✓	✓	✓	✓
Goal Links		✓	✓	✓	✓		
Goals (object)		✓	✓	✓	✓		
Goals (Completion Date field)		✓					
Goals (Key Company Goal field)		✓					
Goals (tab)	Default On						
Metric Data Link		✓	✓	✓	✓		
Metrics		✓	✓	✓	✓		
Performance Cycles	Default On	✓	✓	✓	✓	✓	✓
Recognition (tab)	Default On						
Reward Funds	Default On	✓					
Reward Fund Types	Default On	✓					
Rewards		✓					

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Skills	Default On	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Skill Users		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Table 13: Performance Cycle Manager System Permissions

System Permissions	Enabled
API Enabled	<input checked="" type="checkbox"/>
Edit Events	<input checked="" type="checkbox"/>
Edit Tasks	<input checked="" type="checkbox"/>
Enable Work.com Calibration	<input checked="" type="checkbox"/>
View Setup and Configuration	<input checked="" type="checkbox"/>

Work.com Administrator

The Work.com Administrator profile gives a user full administrative access to Work.com objects and features.

Table 14: Work.com Administrator Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Calibration (tab)	Default On						
Coaching (object)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Coaching (tab)	Default On						
Documents		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Endorsements		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedback (object)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedback Questions		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedback Question Sets		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Feedback Requests (and Feedback tab)	Default On	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Goal Links		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Goals (object)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Goals (Completion Date field)		<input checked="" type="checkbox"/>					
Goals (Key Company Goal field)		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			
Goals (tab)	Default On						
Metric Data Link		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Metrics		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Performance Cycles	Default On	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recognition (tab)	Default On						
Reward Funds	Default On	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reward Fund Types	Default On	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rewards		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Skills	Default On	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Skill Users		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Table 15: Work.com Administrator System Permissions

System Permissions	Enabled
API Enabled	<input checked="" type="checkbox"/>
Create custom Badge Definitions	<input checked="" type="checkbox"/>
Edit Events	<input checked="" type="checkbox"/>
Edit Tasks	<input checked="" type="checkbox"/>
Enable Work.com Calibration	<input checked="" type="checkbox"/>
Moderate Chatter	<input checked="" type="checkbox"/>

System Permissions	Enabled
View Setup and Configuration	

SEE ALSO:


[Work.com Feature Access](#)

[Assign Work.com Profiles](#)

Assign Work.com Licenses

After granting access to Work.com features with permission sets or profiles, assign users a Work.com license.

Work.com has two types of licenses.

- Work.com Only user licenses are for users who don't have a Salesforce license and will only use the Work.com features in your organization.
 -  **Note:** Work.com Only user licenses have limited administrator functionality. Assign Work.com User Feature licenses instead for users who will be administering performance summary cycles or other Work.com features.
- Work.com User Feature licenses are for users who also have a Salesforce license.

You may want to configure Work.com features before assigning licenses to all users. For example, you may want to initially limit licenses to Work.com administrators to avoid exposing certain features prior to your launch date.

[Assign Work.com Only User Licenses](#)

Assign a Work.com Only license to users who don't have a Salesforce license and will only use Work.com.

[Assign Work.com User Feature Licenses](#)

Assign a Work.com User Feature license to users who also have a Salesforce license.

SEE ALSO:

[Assign Work.com Only User Licenses](#)

[Assign Work.com User Feature Licenses](#)

[Configure Work.com Features](#)

EDITIONS

Available in: Salesforce Classic

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

Assign Work.com Only User Licenses

Assign a Work.com Only license to users who don't have a Salesforce license and will only use Work.com.

Work.com Only user licenses have limited administrator functionality. Assign Work.com User Feature licenses instead for users who will be administering performance summary cycles or other Work.com features.

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Click **Edit** next to a user.
3. From the **User License** drop-down, select **Work.com Only**.
4. Click **Save**.

SEE ALSO:

[Assign Work.com Licenses](#)

[Assign Work.com User Feature Licenses](#)

Assign Work.com User Feature Licenses

Assign a Work.com User Feature license to users who also have a Salesforce license.

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Click **Edit** next to a user.
3. In the right-hand column, select the **Work.com User** checkbox.
4. Click **Save**.

SEE ALSO:

[Assign Work.com Licenses](#)

[Assign Work.com Only User Licenses](#)

Configure Work.com Features

Most Work.com features require the Work.com add-on, but some are freely available to Sales Cloud users.

Users can access the Skills and Thanks features (excluding Rewards) without Work.com. Other features require the Work.com add-on.

Table 16: Work.com Features Available

Feature	Requires Work.com Add-On
Recognition: Create and give thanks badges	
Recognition: Create and give rewards badges	<input checked="" type="checkbox"/>

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign user licenses:

- Manage Users

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To assign user feature licenses:

- Manage Users

EDITIONS

Available in: Salesforce Classic

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

Feature	Requires Work.com Add-On
Skills: Share and endorse skills	
Goals: Define and track your work	✓
Coaching: Give real-time coaching	✓
Feedback: Give and offer feedback	✓
Performance: Track performance data	✓
Calibration: Visualize and change performance data	✓

 **Note:** We recommend that you enable Chatter regardless of the edition your org is using. Many Work.com features use the Chatter feed to notify and interact with users. To confirm that Chatter is enabled, from Setup, enter *Chatter Settings* in the *Quick Find* box, then select **Chatter Settings**, and verify that Chatter Settings is enabled.

You can customize where different tabs, such as Goals and Feedback, appear within the Work.com app and on user profiles. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps** and make changes to the desired apps and subtab apps. For more information, see [Managing Subtab Apps](#) in the Salesforce Help.

[Thanks and Skills Features](#)

Set up Thanks and Skills features by configuring thanks in the Chatter publisher and assigning a publisher layout to profiles.

[Goals and Coaching Features](#)

Enable feed and history tracking to further track goals and coaching.

[Performance Summary and Calibration Features](#)

Set up Calibration reports to compare and update performance ratings in your organization.

SEE ALSO:

[Set Up Work.com](#)

[Thanks and Skills Features](#)

[Goals and Coaching Features](#)

[Performance Summary and Calibration Features](#)

[Configure Work.com Reports](#)

Thanks and Skills Features

Set up Thanks and Skills features by configuring thanks in the Chatter publisher and assigning a publisher layout to profiles.

Make sure you've enabled the desired Thanks and Recognition features prior to configuring them. From Setup, enter "Work.com Settings" in the *Quick Find* box, then select **Work.com Settings** and enable the relevant settings.

For detailed information about creating rewards, refer to [Salesforce Help](#). Additionally, information about customizing skills can be found in the [Skills Customization](#) topic.

EDITIONS

Available in: Salesforce Classic

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

[Configure Thanks in the Chatter Publisher and Salesforce App Action Bar](#)

You can change the position of the Thanks action in the Chatter publisher and the Salesforce app action bar, or even hide Thanks for specific profiles.

[Assign Publisher Layout to Profiles](#)

Assign the publisher layout with Thanks to user profiles. People with these profiles can thank their coworkers directly from the publisher.

SEE ALSO:

[Configure Work.com Features](#)

[Configure Thanks in the Chatter Publisher and Salesforce App Action Bar](#)

[Assign Publisher Layout to Profiles](#)

Configure Thanks in the Chatter Publisher and Salesforce App Action Bar

You can change the position of the Thanks action in the Chatter publisher and the Salesforce app action bar, or even hide Thanks for specific profiles.

To modify the Chatter publisher, actions in the publisher must be enabled.

1. From Setup, enter *Chatter Settings* in the Quick Find box, then select **Chatter Settings**.
2. Confirm that **Enable Actions in the Publisher** is selected in the Actions in the Publisher section. If it isn't enabled, click **Edit**, select **Enable Actions in the Publisher**, and click **Save**.
3. From Setup, enter *Publisher Layouts* in the Quick Find box, then select **Publisher Layouts**.
4. Click **Edit** next to the Global Publisher Layout.
5. Drag the **Thanks** action to where you want it to appear in the Chatter publisher or the Salesforce app action bar.
6. Click **Save**.

You can hide Thanks for specific users by changing profile visibility settings.

SEE ALSO:

[Thanks and Skills Features](#)

[Assign Publisher Layout to Profiles](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up actions:

- Customize Application

Assign Publisher Layout to Profiles

Assign the publisher layout with Thanks to user profiles. People with these profiles can thank their coworkers directly from the publisher.

If not everyone in your organization should have this feature, create another layout without Thanks and assign it to a profile. People with that profile won't see Thanks in their publisher.

1. From Setup, enter *Publisher Layouts* in the *Quick Find* box, then select **Publisher Layouts**.
2. Click **Publisher Layout Assignment**.
3. Click **Edit Assignment**.
4. Select a user profile by clicking anywhere on its row in the table.
5. From the Publisher Layout to Use drop-down, select the global publisher layout that you want to assign to the highlighted profile.
6. Save the layout.


SEE ALSO:

[Thanks and Skills Features](#)

[Configure Thanks in the Chatter Publisher and Salesforce App Action Bar](#)

Goals and Coaching Features

Enable feed and history tracking to further track goals and coaching.

 **Note:** Enable Chatter in your organization before configuring Goals and Coaching features.

Feed tracking lets users see Chatter feed updates for any relevant changes. History tracking lets you track changes to critical fields. We recommend that you track changes for Goal, Metric, and Coaching objects.

Surface key company goals to give all employees visibility into company-wide goals.

For additional information about creating an overall Goals strategy for your organization, see the [Goals Strategy Guide](#).

[Enable Feed Tracking for Goals](#)

Track updates for goals so users can receive notifications about important changes.

[Enable Feed Tracking for Coaching](#)

Track updates for coaching spaces, so users can receive notifications about important changes.

[Enable Feed Tracking for Metrics](#)

Track updates for goals so users can receive notifications about important changes.

[Enable History Tracking for Goal Fields](#)

Track changes to the Goal object for auditing purposes.

[Enable History Tracking for Coaching Fields](#)

Track changes to the Coaching object for auditing purposes.

[Enable History Tracking for Metric Fields](#)

Track changes to the Metric object for auditing purposes.

EDITIONS

Available in: **Salesforce Classic**

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

USER PERMISSIONS

To set up quick actions:

- [Customize Application](#)

EDITIONS

Available in: **Salesforce Classic**

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

[Configure Key Company Goals](#)

Key company goals give everyone in your organization visibility into a company-wide goal after you grant sharing access from the goal's detail page. Work.com administrators and people who have been granted access have the ability to create key company goals.

SEE ALSO:


- [Configure Work.com Features](#)
- [Enable Feed Tracking for Goals](#)
- [Enable Feed Tracking for Coaching](#)
- [Enable Feed Tracking for Metrics](#)
- [Enable History Tracking for Goal Fields](#)
- [Enable History Tracking for Coaching Fields](#)
- [Enable History Tracking for Metric Fields](#)
- [Configure Key Company Goals](#)

Enable Feed Tracking for Goals

Track updates for goals so users can receive notifications about important changes.

Determine which goal updates should notify people and select the associated fields for tracking.

1. From Setup, enter *Feed Tracking* in the **Quick Find** box, then select **Feed Tracking**.
2. Click on the Goal object.
3. Click the **Enable Feed Tracking** checkbox.
4. Select the fields you would like to track.

 **Tip:** For goals, it's helpful to track Completion Date, Due Date, Owner Name, Progress, and All Related Objects.

5. Click **Save**.

SEE ALSO:

- [Goals and Coaching Features](#)
- [Enable Feed Tracking for Coaching](#)
- [Enable History Tracking for Goal Fields](#)
- [Enable History Tracking for Coaching Fields](#)
- [Configure Key Company Goals](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize fields tracked in feeds:

- [Customize Application](#)

Enable Feed Tracking for Coaching

Track updates for coaching spaces, so users can receive notifications about important changes.

Determine which coaching updates should notify people and select the associated fields for tracking.

1. From Setup, enter *Feed Tracking* in the **Quick Find** box, then select **Feed Tracking**.
2. Click on the Coaching object.
3. Click the **Enable Feed Tracking** checkbox.
4. Select the fields you would like to track.

 **Tip:** For coaching, it's helpful to track Inactive and All Related Objects.

5. Click **Save**.

SEE ALSO:

- [Goals and Coaching Features](#)
- [Enable Feed Tracking for Goals](#)
- [Enable History Tracking for Goal Fields](#)
- [Enable History Tracking for Coaching Fields](#)
- [Configure Key Company Goals](#)

Enable Feed Tracking for Metrics

Track updates for goals so users can receive notifications about important changes.

Determine which metric updates should notify people and select the associated fields for tracking.

1. From Setup, enter *Feed Tracking* in the **Quick Find** box, then select **Feed Tracking**.
2. Click on the Metric object.
3. Click the **Enable Feed Tracking** checkbox.
4. Select the fields you would like to track.

 **Tip:** For metrics, it's helpful to track Comment, Completion Date, Current Value, Due Date, Goal, Initial Value, Owner Name, Status, Target Value, and All Related Objects.

5. Click **Save**.

SEE ALSO:

- [Goals and Coaching Features](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize fields tracked in feeds:

- [Customize Application](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize fields tracked in feeds:

- [Customize Application](#)

Enable History Tracking for Goal Fields

Track changes to the Goal object for auditing purposes.

We recommend tracking the Completion Date, Due Date, Owner Name, Progress, Start Date, Status, and Description fields.

1. From the object management settings for goals, go to the fields area.
2. Click **Set History Tracking**.
3. Select up to 20 fields to track.
4. Click **Save**.

SEE ALSO:

- [Goals and Coaching Features](#)
- [Enable Feed Tracking for Goals](#)
- [Enable Feed Tracking for Coaching](#)
- [Enable History Tracking for Coaching Fields](#)
- [Configure Key Company Goals](#)
- [Find Object Management Settings](#)

Enable History Tracking for Coaching Fields

Track changes to the Coaching object for auditing purposes.

We recommend tracking the Coach, Inactive, Owner Name, and Person Coached fields.

1. From the object management settings for goals, go to the fields area.
2. Click **Set History Tracking**.
3. Select up to 20 fields to track.
4. Click **Save**.

SEE ALSO:

- [Goals and Coaching Features](#)
- [Enable Feed Tracking for Goals](#)
- [Enable Feed Tracking for Coaching](#)
- [Enable History Tracking for Goal Fields](#)
- [Configure Key Company Goals](#)
- [Find Object Management Settings](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up which fields are tracked:

- [Customize Application](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up which fields are tracked:

- [Customize Application](#)

Enable History Tracking for Metric Fields

Track changes to the Metric object for auditing purposes.

We recommend tracking the Comment, Completion Date, Current Value, Due Date, Goal, Initial Value, Owner Name, Status, Target Value, Weight, and Description fields.

1. From the object management settings for metrics, go to the fields area.
2. Click **Set History Tracking**.
3. Select up to 20 fields to track.
4. Click **Save**.

SEE ALSO:

- [Goals and Coaching Features](#)
- [Find Object Management Settings](#)

Configure Key Company Goals

Key company goals give everyone in your organization visibility into a company-wide goal after you grant sharing access from the goal's detail page. Work.com administrators and people who have been granted access have the ability to create key company goals.

Alternatively, you can also set field-level security using permission sets.

1. From the object management settings for goals, go to the fields area.
2. Click on the **Key Company Goal** field label.
3. Click **Set Field-Level Security**.
4. Ensure the **Visible** checkbox is selected for all profiles with goals access.
5. Ensure the **Read-Only** checkbox is not selected for profiles that should be able to create key company goals.
6. Click **Save**.

SEE ALSO:

- [Goals and Coaching Features](#)
- [Enable Feed Tracking for Goals](#)
- [Enable Feed Tracking for Coaching](#)
- [Enable History Tracking for Goal Fields](#)
- [Enable History Tracking for Coaching Fields](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set up which fields are tracked:

- Customize Application

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set field-level security:

- Manage Profiles and Permission Sets
- AND
- Customize Application

Performance Summary and Calibration Features

Set up Calibration reports to compare and update performance ratings in your organization.

Work.com performance summaries gather feedback about people in your organization with a custom questionnaire. You can create, deploy, and share different performance summaries across your organizations by managing performance summary cycles. Once users have submitted performance summary details, you can see and update performance ratings across the organization with the Calibration feature.

You can create and deploy performance summary cycles from the **Performance Cycles** tab. Users with the Performance Cycle Manager permission set or profile will be able to access the **Performance Cycles** tab.

For detailed information about creating and deploying performance summary cycles, refer to [Performance Summary Cycles Overview](#) in the Salesforce Help. For more information about the Calibration feature, refer to the [Calibration Overview](#) topic.

Set Up Calibration Reports

Calibration reports are populated with data from performance summary cycles. They are designed for managers and executives to review overall performance of their teams or organizations. Before using the Calibration feature, you must create a report that loads the performance summary data.

SEE ALSO:

[Configure Work.com Features](#)

[Set Up Calibration Reports](#)

Set Up Calibration Reports

Calibration reports are populated with data from performance summary cycles. They are designed for managers and executives to review overall performance of their teams or organizations. Before using the Calibration feature, you must create a report that loads the performance summary data.

Define your own calibration report or download the calibration reports package from the Package Installation page.

- [Production Calibration Report Package](#)
- [Sandbox Calibration Report Package](#)

1. On the Calibration tab, select a calibration report from the drop-down list.
2. Click **View/Edit Report**.
3. Click **Save As**.
4. Type a name, an optional description, unique name, and specify the report folder.
If the report is saved to a public folder, anyone with permission to view the folder sees this report, but each user will only see performance summaries they have access to. If the report is saved to "My Personal Custom Reports," only you will see the Calibration report.
5. Click **Save & Return to Report**.



Tip: You can also create a new report. Once a report meets specific criteria, it automatically appears in the Calibration drop down.

- The report must be a **Work.com Calibration** report type.

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**

USER PERMISSIONS

To view the Calibration tab:

- **Enable Work.com Calibration**

- The report must be in a **Summary Format**, grouped by Feedback Question Name and then by Feedback.
- These columns should be listed in the report:
 - Performance Cycle ID
 - Feedback Request ID
 - Feedback ID
 - Subject: User ID
 - Subject: Full Name (or Subject: First Name and Subject: Last Name)
- The report must be filtered to only view one performance summary cycle.

Once you've downloaded the package or created a report that meets the criteria, it automatically appears in the Calibration drop-down.

SEE ALSO:

[Performance Summary and Calibration Features](#)

Configure Work.com Reports

Use reports and dashboards to see how Work.com features are being used in your organization.

Salesforce reports and dashboards are available for all Work.com users. Administrators should install the reporting package that applies to their Work.com edition. The Work.com reporting package contains:

- Custom report types for Work.com objects
- Custom fields for Work.com objects
- Example dashboards

Install one of the following packages based on the Work.com edition you purchased. For example, if your organization has Work.com Align, only install the Align package. Refer to your product contract to confirm which Work.com edition you have.



Note:

- Make sure you've enabled the features related to your Work.com edition prior to installing the package. The package will only install correctly if you've enabled the features beforehand.
- If you purchased Work.com after the Spring '15 release, install the Work.com Perform package.
- It is not possible or necessary to install all the packages.

Production Packages:

- [Work.com Motivate](#)
- [Work.com Align](#)
- [Work.com Perform](#)
- [Thanks and Skills Reports and Dashboards](#)

Sandbox Packages:

- [Work.com Motivate](#)
- [Work.com Align](#)
- [Work.com Perform](#)

EDITIONS

Available in: **Salesforce Classic**

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

- [Thanks and Skills Reports and Dashboards](#)

[Work.com Perform Package Details](#)

The Work.com reports and dashboards included in the reporting package are a good starting point. Use these examples to create reports and dashboards that are useful to your organization.

SEE ALSO:

[Set Up Work.com](#)

[Configure Work.com Features](#)

[Work.com Perform Package Details](#)

Work.com Perform Package Details

The Work.com reports and dashboards included in the reporting package are a good starting point. Use these examples to create reports and dashboards that are useful to your organization.

Work.com Perform Package Reports

These reports are available after installing the [Work.com Perform](#) package. Work.com reports are organized in folders based on features:

- Work.com Coaching Reports
- Work.com Goal Reports
- Work.com Performance Summary Reports
- Work.com Recognition Reports
- Work.com Skills Reports

EDITIONS

Available in: Salesforce Classic

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

Table 17: Work.com Coaching Reports

Report Name	Description
Coaching Activities (Tasks and Events)	Tasks and events related to coaching spaces
Coaching Activities Team - Last 30 Days	Coaching activities of your team over the last 30 days
Coaching Activity Last 30 Days	Coaching activities over the last 30 days sorted by department
Coaching Coverage Report	The percentage of users that have coaching spaces by department
Coaching Events by Relationship	Events related to coaching spaces
Coaching Relationships	All coaching spaces in your organization

Table 18: Work.com Goal Reports

Report Name	Description
All Goals	All goals in your organization
All Metrics	All metrics in your organization
Goals Created by Date	Goals sorted by the date they were created

Report Name	Description
Key Company Goal Progress	Key company goals, their status, and other details
Metrics Flagged as Behind or Critical	Metrics with a Status of Behind or Critical
Stale Goals	Goals that haven't been modified in 30 days
Work.com Team Goals Progress	Your team's goals and their progress

Table 19: Work.com Performance Summary Reports

Report Name	Description
All Active Users with a Manager	All active users with a manager in your org
Manager Questions - X	The manager questions asked in a performance summary
Performance Answers by Question - Q1	Sample report for tracking performance cycle activity
Performance Answers by Question - Q3	Sample report for tracking performance cycle activity
Performance Summaries by Department	Performance summaries grouped by department
Performance Summaries with Answers - Q1	Sample report for tracking performance cycle activity
Performance Summaries with Answers - Q3	Sample report for tracking performance cycle activity
Performance Summary Cycle Status Update	The request status across different performance summaries
Self Summary Questions - X	The questions asked in self summaries
Summary Cycle Details	The percentage of participants per performance cycle
Summary Cycle Details - Submitted	The percentage of submitted requests per performance cycle

Table 20: Work.com Recognition Reports

Report Name	Description
Badges Given - By Date Given	Thanks badges given grouped by the date each badge was given
Breakdown of Badges Given	Thanks badges given grouped by individual badges and the role of the badge giver
Breakdown of Badges Received	Thanks badges received grouped by individual badges and the role of the badge recipient
Reward Funds Given	The amount of each reward fund that has been distributed
Reward Funds Remaining	The amount of each reward fund that is still remaining
Thanks by Giver	Thanks badges given by each user
Thanks Given - Recipient Data	Thanks badges received by each user
Thanks Received by Role	Thanks badges received by each role

Table 21: Work.com Skills Reports

Report Name	Description
Most Endorsed People	Users with the most skill endorsements
Most Skilled People	Users with the most associated skill records
New Skill Creation By Date	Skills arranged by the date they were created
Skill Endorsements By Date	Endorsements arranged by the date they were created
Skills Added To Profiles By Date	Skills arranged by the date they were associated with different user profiles
Top Skills	Skills arranged by the number of people with the skill

Work.com Perform Package Dashboards

These dashboards are available after installing the [Work.com Perform](#) package:

- Work.com Coaching Dashboards
- Work.com Performance Summary Dashboards
- Work.com Recognition Dashboards
- Work.com Skills Dashboards

Table 22: Work.com Coaching Dashboards

Report Name	Description
Company Coaching Dashboard	Displays coaching coverage and activity across your company
Company Goals Dashboard	Displays Key Company Goals and the number of goals created
Manager Coaching Dashboard	Displays coaching and goals related to your team

Table 23: Work.com Performance Summary Dashboards

Report Name	Description
Performance Cycle Dashboard	Displays statistics about the participants, questions, and progress of a specific performance cycle

Table 24: Work.com Recognition Dashboards

Report Name	Description
Recognition Dashboard	Displays badge statistics and users giving and receiving badges
Recognition with Rewards Dashboard	Displays badge and rewards statistics and users giving and receiving badges

Table 25: Work.com Skills Dashboards

Report Name	Description
Skills Dashboard	Displays skills statistics for your organization

SEE ALSO:

[Configure Work.com Reports](#)

Configure Work.com

Configure Work.com to meet the needs of your business.

[Work.com Editions and Permissions](#)

Most Work.com features require the Work.com add-on, but Skills and Thanks functionality (excluding Rewards) are freely available to Sales Cloud users. The permissions and preferences necessary for different tasks are broken up by feature area.

[Enable or Disable Work.com Settings](#)

On the Work.com Settings page, you can enable and disable features like Thanks, Rewards, Calibration, and Skills for your organization.

[Create a Support Case](#)

Log a new case with support if you need certain permissions enabled or are experiencing technical difficulties.

[Performance Summary Cycles Overview](#)

Use Work.com performance summary cycles to create, deploy, and share performance summaries across your company.

[Calibration Overview](#)

Use Work.com calibration reports to visualize, compare, and update performance ratings across your entire company.

[Skills Customization](#)

You can change object permissions for the skill and endorsement objects to suit the needs of your organization.

EDITIONS

Available in: Salesforce Classic

Work.com is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

Work.com Editions and Permissions

Most Work.com features require the Work.com add-on, but Skills and Thanks functionality (excluding Rewards) are freely available to Sales Cloud users. The permissions and preferences necessary for different tasks are broken up by feature area.

General Work.com Administrator Tasks

This includes tasks for administering and implementing Work.com.

Administrator Task	Preferences and Permissions Required
Enable Work.com features:	"Customize Application"
Assign a Work.com administrator:	"Customize Application"
Assign permission sets:	"Assign Permission Sets"

EDITIONS

Available in: Salesforce Classic

Work.com is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

Administrator Task	Preferences and Permissions Required
Assign profiles:	"Manage Users"
Assign user licenses:	"Manage Users"
Assign user feature licenses	"Manage Users"
Set up actions:	"Customize Application"
Customize fields tracked in feeds:	"Customize Application"
Set field-level security:	"Manage Profiles and Permission Sets" "Customize Application"

Thanks and Reward Tasks

This includes tasks for Work.com end users, such as viewing and creating thanks badges and rewards.

End User Task	Preferences and Permissions Required
View the Badges tab:	No additional user permissions needed
Build a badge:	"Create" on Documents The "Restrict Custom Badge Creator" setting is disabled by default. If the setting is enabled, users need the "Create Custom Badge Definitions" permission.
View Reward Funds:	"Read" on Reward Funds
Create Reward Funds:	"Create" on Rewards "Create" on Reward Funds
View Reward Fund Types:	"Read" on Reward Fund Types
Create Reward Fund Types:	"Create" on Reward Fund Types "Read" and "Create" on Reward Funds "Read" and "Create" on Rewards

Skills Tasks

This includes tasks for Work.com end users using skills.

End User Task	Preferences and Permissions Required
Add skills:	"Create" on Skills and Skill Users
Remove skills:	"Delete" on Skill Users
Add endorsements to skills:	"Create" on Endorsements

Goal Tasks

This includes tasks for Work.com end users using goals.

End User Task	Preferences and Permissions Required
View goals:	"Read" on Goals and Goal Links
Create goals:	"Create" on Goals and Goal Links
Edit goals:	"Edit" on Goals and Goal Links
Delete goals:	"Delete" on Goals and Goal Links

Metric Tasks

This includes tasks for Work.com end users using metrics.

End User Task	Preferences and Permissions Required
View metrics:	"Read" on Metrics
Create metrics:	"Create" on Metrics
Link metrics to reports:	"Create" on Metric Data Links

Coaching Tasks

This includes tasks for Work.com end users using coaching spaces.

End User Task	Preferences and Permissions Required
View coaching spaces:	"Read" on Coaching
Create coaching spaces:	"Create" on Coaching
Set coaching to Inactive:	"Edit" on Coaching

Feedback Tasks

This includes tasks for Work.com end users using feedback.

End User Task	Preferences and Permissions Required
View Feedback:	"Read" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles
Create Feedback:	"Create" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles

End User Task	Preferences and Permissions Required
Edit or submit Feedback:	"Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles
Delete Feedback (only for administrators with MAD/VAD permissions)	"Delete" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles

Performance Summary Tasks

This includes tasks for Work.com end users using performance summaries.

End User Task	Preferences and Permissions Required
View performance summaries:	"Read" on Performance Cycles
Create performance summaries:	"Create" on Performance Cycles
Answer and submit performance summaries:	"Create," "Read," and "Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles
Add peers to performance summaries	"Create," "Read," and "Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles

Performance Summary Cycle Tasks

This includes tasks for Work.com administrators managing performance summary cycles.

Administrator Task	Preferences and Permissions Required
Create a performance summary cycle:	"Create," "Read," "Edit," "Delete," "View All," and "Modify All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles
Add people to a performance summary cycle:	"View Setup and Configuration" "Create," "Read," "Edit," "Delete," "View All," and "Modify All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles
Delete people from a performance summary cycle:	"Create," "Read," "Edit," "Delete," "View All," and "Modify All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles

Administrator Task	Preferences and Permissions Required
Edit a performance summary cycle:	"Create," "Read," "Edit," "Delete," "View All," and "Modify All" on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles
View the Calibration tab:	"Enable Work.com Calibration"
Edit performance ratings:	"Create," "Read," and "Edit" on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests "Read" on Performance Cycles "Enable Work.com Calibration"

SEE ALSO:

[Enable or Disable Work.com Settings](#)

[Set Up Work.com](#)

Enable or Disable Work.com Settings

On the Work.com Settings page, you can enable and disable features like Thanks, Rewards, Calibration, and Skills for your organization.

All the settings except for Thanks Settings and Skills Settings require a Work.com license. Work.com is available as an add-on license for **Professional Edition**, **Enterprise Edition**, or **Unlimited Edition** and is included in **Performance Edition**.

1. From Setup, enter "Work.com Settings" in the **Quick Find** box, then select **Work.com Settings**.
2. Select the Work.com feature you want to enable or deselect the feature you want to disable.

Feature	Section	Description
Enable Thanks	Thanks Settings	Enable Thanks to allow users to recognize others with thanks badges on the Chatter feed. If you disable this setting, users no longer see the Thanks action in the Chatter publisher. However, they can still see previously created Thanks posts.
Restrict Custom Badge Creators	Thanks Settings	By default, all users can create custom badges. This setting restricts badge creation to users that have the "Create" permission on the Reward object.
Enable Rewards	Recognition Settings	Enable Rewards to tie tangible rewards to badges. Reward creators can upload gift codes to create Reward funds. See the "Reward Funds" topic for more information about creating rewards.

EDITIONS



Available in: Salesforce Classic

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

USER PERMISSIONS

To edit Work.com settings:

- Customize Application

Feature	Section	Description
Enable Manager Groups for Coaching	Coaching Settings	Enable manager groups to give managers access to the coaching spaces of the users that report to them. To enable this setting, the Manager Groups setting must first be enabled in Setup, under Sharing Settings .
Enable Manager Groups for Goals	Goal Settings	Enable manager groups to give managers access to the goals of the users that report to them. To enable this setting, the Manager Groups setting must first be enabled in Setup, under Sharing Settings .
Enable Calibration	Perform Settings	Enable Calibration to see and update performance across teams and individuals.  Note: For Performance Edition organizations, Calibration is not available for the following profiles: Contract Manager, Marketing User, Read Only, and Solution Manager.
Enable Skills	Skills Settings	Enable Skills to allow users to add skills to their profiles and endorse the skills of other users. Enabling this setting replaces the Knowledgeable About widget on Chatter profiles.
Restrict Skill and Endorsement Editing to Record Detail Pages	Skills Settings	Disables inline editing of skills and endorsements on Chatter profiles, and restricts editing to record detail pages. Recommended if you have customized these objects with custom required fields.  Note: Don't enable this setting if you want to use skills in Chatter profiles.
Enable Automatic Skill Feed Posts	Skills Settings	Enable to automatically create Chatter feed posts when a user adds a new skill.
Enable Suggested Skills	Skills Settings	Enable Suggested Skills to have the skills widget suggest skills for users to add based on their Chatter Topics activity.

3. Click **Save**.

SEE ALSO:

[Set Up Work.com](#)

[Performance Summary Cycles Overview](#)

[Work.com Editions and Permissions](#)

[Calibration Overview](#)

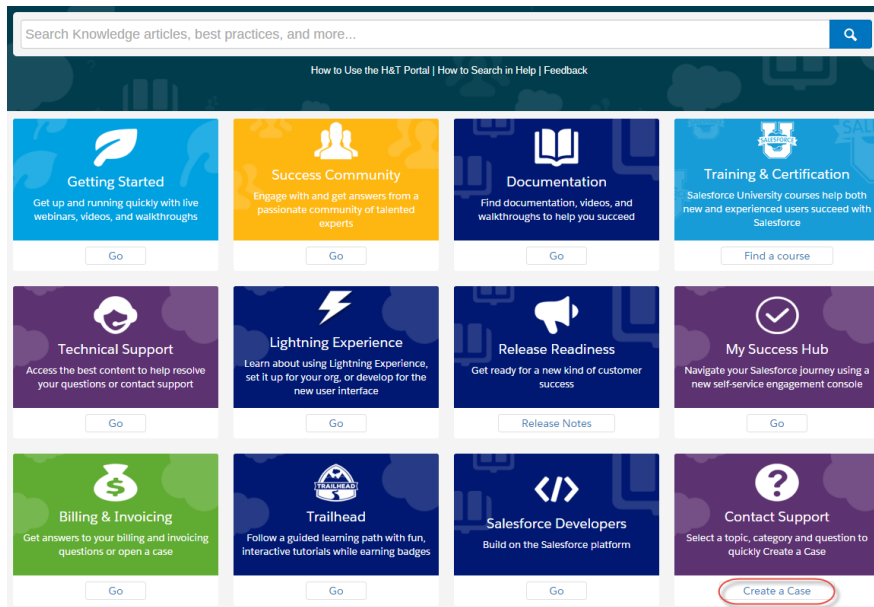
[Skills Customization](#)

[Create a Support Case](#)

Create a Support Case

Log a new case with support if you need certain permissions enabled or are experiencing technical difficulties.

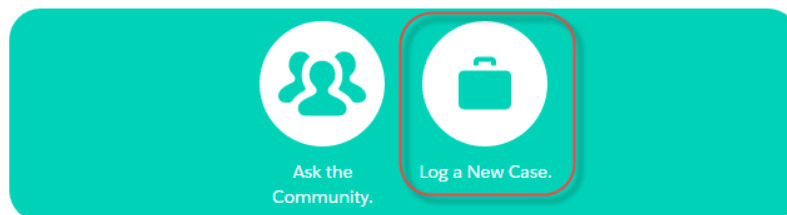
1. Log in to Salesforce, then go to the [Help and Training](#) page.
2. In the Contact Support section, click **Create a Case**.



3. Select your support topic and category.
For example, if your issue is related to Work.com, click **Sales Cloud > Work.com**.
4. Select a question that relates to your issue.
5. If you don't find the solution to your problem, click **Log a New Case**.

- + **Setting Up Mutual Authentication Certificates**
- + **Custom Formula: Need help creating field formulas with logic**

Don't see your solution? Choose the additional support options below. x



6. Enter case details and click **Submit**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in all editions

 **Note:** To attach related files, click **Attach a File** after the case is created.

SEE ALSO:

[Enable or Disable Work.com Settings](#)



Performance Summary Cycles Overview

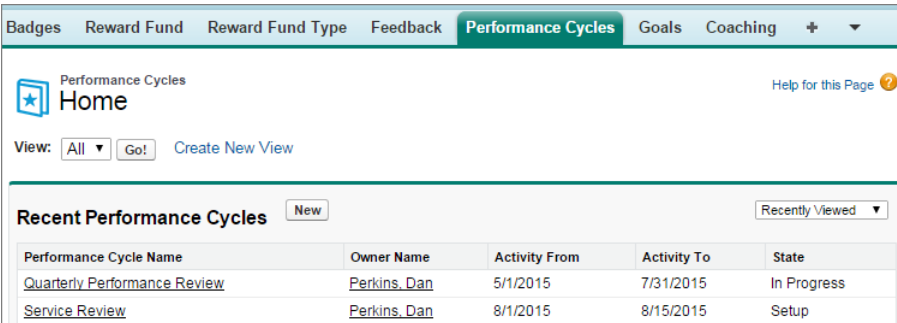
Use Work.com performance summary cycles to create, deploy, and share performance summaries across your company.

In a typical performance summary cycle, you perform the following activities:

1. Plan—Create a performance summary cycle and add the people you want reviewed.
2. Deploy—Make the performance summaries available for users to complete.
3. Evaluate—Write performance summaries and submit them.
4. Calibrate—Optionally compare and update submitted performance summaries with the Calibration feature.
5. Share—Share the submitted performance summaries with summary subjects.
6. Finish—End the performance summary cycle.

Click the Performance Cycles tab to see a list of recently viewed performance cycles.

 **Note:** If the Performance Cycles tab isn't displayed, select Work.com from the Lightning Platform app drop-down menu at the top-right or click  to the right of your current tabs and select it from the All Tabs page.



Performance Cycle Name	Owner Name	Activity From	Activity To	State
Quarterly Performance Review	Perkins, Dan	5/1/2015	7/31/2015	In Progress
Service Review	Perkins, Dan	8/1/2015	8/15/2015	Setup

Click **New** to create a performance cycle, or click the name of a cycle to see more details.

EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition,** or **Developer Edition**, and is included in **Performance Edition**.

Performance Cycle
Quarterly Performance Review

Edit Layout | Printable View | Help for this Page

Show Feed

Feedback Question Sets [2] | Feedback Requests [4] | Job Tracker [2]

Performance Cycle Detail Clone Share All Finish

▼ **Information**

Performance Cycle Name	Quarterly Performance Review	Owner Name	Dan Perkins
Activity From	5/1/2015	Activity To	7/31/2015
State	In Progress	Current Task	i
Last Shared Date	8/13/2015 11:18 AM i		

Clone Share All Finish

Feedback Question Sets

Action	Feedback Question Set Name	Feedback Type	Due Date
Self Summary		Self Summary	8/21/2015
Manager Review		Manager Summary	8/31/2015

Feedback Requests Add Subject Upload Subject CSV

Action	Feedback Request Name	Feedback About	Feedback From	Feedback Request State
	Feedback about Joe Cake Quarterly Performance Review Manager Summary	Joe Cake	Sally Strudel	Submitted
	Feedback about Joe Cake Quarterly Performance Review Self Summary	Joe Cake	Joe Cake	Draft
	Feedback about Sally Strudel Quarterly Performance Review Manager Summary	Sally Strudel	Dan Perkins	Draft
	Feedback about Sally Strudel Quarterly Performance Review Self Summary	Sally Strudel	Sally Strudel	Declined

Job Tracker

Action	Job Name	Status	Start Date	End Date	Message
Deploy Performance Cycle		Completed	8/13/2015 11:15 AM	8/13/2015 11:15 AM	The Bulk API batch completed.
Share Performance Summaries		Completed	8/13/2015 11:18 AM	8/13/2015 11:18 AM	

From this page you can:

- See details about the performance summary cycle.
- Take actions on the cycle. Available actions are determined by your cycle's state and may include **Clone**, **Edit**, **Deploy**, **Delete**, **Share All**, and **Finish**.
- Access the questions related to a performance cycle.
- View a list of performance summary feedback requests. You can also add subjects individually or upload a CSV file to add subjects in bulk.
- View a list of jobs performed by the performance cycle, including cycle deployment and sharing performance summaries.

[Create a Performance Summary Cycle](#)

Create a Work.com performance summary cycle from the Performance Cycles page to gather feedback about people in your organization.

[Add People to a Performance Summary Cycle](#)

Add people to a performance summary cycle manually or through a CSV file.

[Delete People from a Performance Summary Cycle](#)

If you added someone you don't need to evaluate, delete them from the performance summary cycle.

[Deploy a Performance Summary Cycle](#)

Deploy a performance summary cycle to make the summaries available for people to complete.

[Performance Summary Cycle Actions](#)

Different actions are available on a performance cycle's detail page depending on the cycle's state.

SEE ALSO:

[Manage Performance Summaries](#)

[Create a Performance Summary Cycle](#)

[Add People to a Performance Summary Cycle](#)

[Delete People from a Performance Summary Cycle](#)


[Deploy a Performance Summary Cycle](#)

[Performance Summary Cycle Actions](#)

Create a Performance Summary Cycle

Create a Work.com performance summary cycle from the Performance Cycles page to gather feedback about people in your organization.

1. Click the Performance Cycles tab.

If the Performance Cycles tab isn't displayed, select Work.com from the Lightning Platform app drop-down menu at the top-right or click  to the right of your current tabs and select it from the All Tabs page.

2. Click **New**.



Note: You can also create performance cycles by clicking **Clone** on another performance cycle's detail page, but cloning a cycle copies only the cycle name, activity start date, and activity end date. Question sets, due dates, and other details are not copied.

3. Enter a cycle name, an activity start date, and an activity end date.

4. Click **Save**.

5. Click **New Feedback Question Set**.

6. Enter a question set name, feedback type, and due date.

Question sets group questions according to their intended audience. For example, a performance summary about Bill Jones could have up to four different audiences:

- Manager Summary—Questions for Bill's manager. By default, every cycle must include a manager summary.
- Self Summary—Questions for Bill.
- Peer Summary—Questions for Bill's peers.
- Skip Level Summary—Questions for Bill's direct reports.

7. Click **Save**.

8. Click **New Feedback Question**.

9. Enter question details.

You can specify rules for each question:

- Optional—The person writing the summary isn't required to answer this question.
- Confidential—The subject of the summary won't see the submitted answer. This rule isn't available for self summaries.

You can also add instructions at the beginning of each question.

10. Click **Save**.

11. Add additional question sets and questions, as needed.

Once you're done adding questions, add people to the performance summary cycle.

SEE ALSO:

[Performance Summary Cycles Overview](#)

[Manage Performance Summaries](#)

[Add People to a Performance Summary Cycle](#)

[Deploy a Performance Summary Cycle](#)

EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view performance summaries:

- Read on Performance Cycles

To create a Performance Summary Cycle:


- Create, Read, Edit, Delete, Modify All, and View All on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles

Add People to a Performance Summary Cycle

Add people to a performance summary cycle manually or through a CSV file.

You can only add people to summary cycles with a state of Setup or In Progress.

1. Click the Performance Cycles tab.

If the Performance Cycles tab isn't displayed, select Work.com from the Lightning Platform app drop-down menu at the top-right or click  to the right of your current tabs and select it from the All Tabs page.

2. Click a performance summary cycle.

3. In the Feedback Requests section, add users to the performance cycle.

- To manually enter subjects, click **Add Subject**. Enter the user's name and click **Save**.
- To upload subjects through a CSV file, click **Upload Subject CSV**, then select **Choose File**. Select a CSV file, click **Upload**, and save your changes.

The CSV file should contain a list of either user IDs (example: 005R0000000DjZW) or usernames (example: john@acme.com) in the first column. The data should begin on the second row, because the first row is seen as the header row and is not uploaded.



Tip: Many organizations have specific requirements about participation in a performance summary cycle. Use the Users report to narrow down the list of users you want to add to performance summaries and obtain the usernames there.

The Job Tracker displays the status of the CSV upload. Additionally, you can confirm the users included in a performance summary cycle in the Feedback Requests section.

SEE ALSO:

[Performance Summary Cycles Overview](#)

[Deploy a Performance Summary Cycle](#)

[Delete People from a Performance Summary Cycle](#)

EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view performance summaries:

- Read on Performance Cycle

To add people to a Performance Summary Cycle:

- View Setup and Configuration


AND

Create, Read, Edit, Delete, Modify All, and View All on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles

Delete People from a Performance Summary Cycle

If you added someone you don't need to evaluate, delete them from the performance summary cycle.

You can only delete people from summary cycles with a state value of Setup.

1. Click the Performance Cycles tab.
If the Performance Cycles tab isn't displayed, select Work.com from the Lightning Platform app drop-down menu at the top-right or click  to the right of your current tabs and select it from the All Tabs page.
2. Click a performance summary cycle.
3. In the Feedback Requests section, click **Del** in the Action column of the subject you want to delete.

SEE ALSO:

[Performance Summary Cycles Overview](#)

[Deploy a Performance Summary Cycle](#)

[Add People to a Performance Summary Cycle](#)

EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view performance summaries:


- Read on Performance Cycle

To delete people from a Performance Summary Cycle:


- Create, Read, Edit, Delete, Modify All, and View All on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, and Performance Cycles

Deploy a Performance Summary Cycle

Deploy a performance summary cycle to make the summaries available for people to complete.

 **Note:** You can't edit questions or cycle details after a performance summary cycle is deployed, but you can add more people.

1. Click the Performance Cycles tab.

If the Performance Cycles tab isn't displayed, select Work.com from the Lightning Platform app drop-down menu at the top-right or click  to the right of your current tabs and select it from the All Tabs page.

2. Click a performance summary cycle.

3. Click **Deploy**.

Any inactive users are automatically removed prior to cycle deployment. When deployment is complete, you'll receive a detailed email that describes the cycle deployment and any users that were removed. You can add them back again later, if necessary.

Once deployed, a manager summary is assigned to the manager of each person added to the cycle. If the cycle contains self summaries, the self summary is assigned to the associated person. Each person assigned a summary receives an email notification and can start working on their summaries.

SEE ALSO:

[Performance Summary Cycles Overview](#)

[Manage Performance Summaries](#)

[Create a Performance Summary Cycle](#)

EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To edit a Performance Summary Cycle:

- Create, Read, Edit, Delete, Modify All, and View All on Feedback, Feedback Questions, Feedback Question Sets, Feedback Requests, Performance Cycles

Performance Summary Cycle Actions

Different actions are available on a performance cycle's detail page depending on the cycle's state.

Action	Available In	Description
Edit	Setup	Allows user to edit a performance cycle's name, activity start date, and activity end date.
Deploy	Setup	Deploys the summary cycle and associated summaries. Changes the summary cycle status to In Progress.
Delete	Setup	Deletes a summary cycle and the associated summaries.
Finish	In Progress	Completes a performance summary cycle and changes the summary cycle status to Finished. This also removes declined summaries and summaries that were not submitted.
Clone	Setup, In Progress, Finished	Clones a summary cycle. This copies the cycle name, activity start date, and activity end date. However, question sets, due dates, people, and other details are not copied.
Share All	In Progress	Shares the submitted performance summaries with the summary subjects. This doesn't include questions marked Confidential.

SEE ALSO:

[Performance Summary Cycles Overview](#)

[Create a Performance Summary Cycle](#)

[Deploy a Performance Summary Cycle](#)

EDITIONS


Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

Calibration Overview

Use Work.com calibration reports to visualize, compare, and update performance ratings across your entire company.

 **Note:** For **Performance Edition** organizations, Calibration is not available for the following profiles: Contract Manager, Marketing User, Read Only, and Solution Manager.

Calibration reports are populated with data from performance summary cycles. They are designed for managers and executives to review overall performance of their teams or organizations. You can quickly identify high and low performers, and depending on user permissions, make changes to a person's individual performance ratings directly in the calibration report.

Create your own calibration report or download the calibration reports package from the Package Installation page.

- [Production Calibration Report Package](#)
- [Sandbox Calibration Report Package](#)

Access calibration reports from the Calibration tab. Note that you can only view the results for a single performance summary cycle at a time.

The Distribution Graph shows the distribution of ratings for each multiple choice question. Select different questions in the drop-down list to view the associated rating distribution.

The Employees in Graph section shows the performance summary details for users included in the performance review. You can filter and sort each column. Filtering the columns also updates the distribution graph. You can also add custom columns to filter performance summary details by location, department, or other measures. View individual performance summaries by clicking on the View column.

[Create a Calibration Report](#)

Create a calibration report by copying an existing report or creating a new report that meets the proper criteria.

[Customize a Calibration Report](#)

Enhance your calibration report with additional columns and filters.

[Update Performance Summary Details](#)

Easily update performance summary details directly in the calibration report.

[Export Calibration Report Details](#)

Performance summary data can be exported with the underlying calibration report.

SEE ALSO:

[Enable or Disable Work.com Settings](#)

[Create a Calibration Report](#)

[Customize a Calibration Report](#)

[Update Performance Summary Details](#)

[Export Calibration Report Details](#)

[Performance Summary Cycles Overview](#)

EDITIONS

Available in: Salesforce Classic

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

Calibration requires a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view the Calibration tab:

- Enable Work.com Calibration

To edit performance ratings:

- Create, Read, and Edit on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests

AND

Read on Performance Cycles

Create a Calibration Report

Create a calibration report by copying an existing report or creating a new report that meets the proper criteria.

Alternatively, you can download the calibration report package from the Package Installation page.

- [Production Calibration Report Package](#)
- [Sandbox Calibration Report Package](#)

1. On the Calibration tab, select a calibration report from the drop-down list.
2. Click **View/Edit Report**.
3. Click **Save As**.

4. Type a name, an optional description, unique name, and specify the report folder.

If the report is saved to a public folder, anyone with permission to view the folder sees this report, but each user will only see performance summaries they have access to. If the report is saved to "My Personal Custom Reports," only you will see the Calibration report.

5. Click **Save & Return to Report**.



Tip: You can also create a new report. Once a report meets specific criteria, it automatically appears in the Calibration drop down.

- The report must be a **Work.com Calibration** report type.
- The report must be in a **Summary Format**, grouped by Feedback Question Name and then by Feedback.
- These columns should be listed in the report:
 - Performance Cycle ID
 - Feedback Request ID
 - Feedback ID
 - Subject: User ID
 - Subject: Full Name (or Subject: First Name and Subject: Last Name)
- The report must be filtered to only view one performance summary cycle.

SEE ALSO:

[Calibration Overview](#)

[Build a Report in Salesforce Classic](#)

[Customize a Calibration Report](#)

EDITIONS

Available in: Salesforce Classic

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

Calibration requires a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS


To view the Calibration tab:

- Enable Work.com Calibration

Customize a Calibration Report

Enhance your calibration report with additional columns and filters.

Calibration reports use Salesforce reporting. You can filter and specify additional custom columns for your calibration report. The columns display in the order you specify. However, the sort order in reports doesn't apply in calibration reports.

1. On the Calibration tab, select a calibration report from the drop-down list.
 2. Click **View/Edit Report**.
 3. Click **Customize**.
 4. Add filters and columns to your report, as necessary.
 - The following columns are required and can't be removed from calibration reports:
 - Performance Cycle ID
 - Feedback Request ID
 - Feedback ID
 - Subject: User ID
 - Subject: Full Name (or Subject: First Name and Subject: Last Name)
 5. Click **Save**.
-  **Example:** Some common uses include:
- Filter by Performance Summary Cycle for the required performance summary cycle
 - Filter by Department to create a report for the department
 - Filter by Location to create a report for that location

SEE ALSO:

- [Calibration Overview](#)
- [Create a Calibration Report](#)

EDITIONS

Available in: Salesforce Classic

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

Calibration requires a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view the Calibration tab:

- Enable Work.com Calibration

Update Performance Summary Details

Easily update performance summary details directly in the calibration report.

You can only update performance summaries you have access to. If you have “Modify All Data” or “View All Data” permissions for performance summaries, then you can see the ratings of performance summaries before they are submitted. The only editable fields are the multiple choice questions answered by a user’s manager, and do not include peer, self, or skip level summaries. Once the performance summary is finalized and shared with the user, answers can’t be edited.

1. On the Calibration tab, select a calibration report from the drop-down list.
2. On the Employees in Graph section, double-click the rating to you want to change.
You can only change ratings on a submitted performance summary.
3. Select the new value.
4. Click **Save**.

SEE ALSO:

- [Calibration Overview](#)
- [Create a Calibration Report](#)

EDITIONS

Available in: Salesforce Classic

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

Calibration requires a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view the Calibration tab:

- Enable Work.com Calibration

To edit performance ratings:

- Create, Read, and Edit on Feedback, Feedback Question, Feedback Question Sets, and Feedback Requests

AND

Read on Performance Cycles

Export Calibration Report Details

Performance summary data can be exported with the underlying calibration report.

1. On the Calibration tab, select a calibration report.
2. Click **View/Edit Report**.
3. Click **Export Details**.
4. Select the file encoding and file format.
5. Click **Export**.

SEE ALSO:

[Calibration Overview](#)

[Create a Calibration Report](#)

Skills Customization

You can change object permissions for the skill and endorsement objects to suit the needs of your organization.

Customize the skill and endorsement objects in the same way you edit other objects. This includes adding custom fields, modifying page layouts, and adding triggers, workflow, and validation rules. You can also customize the hovers that appear on skills, so that you expose specific standard and custom fields.

EDITIONS

Available in: Salesforce Classic

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

Calibration requires a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view the Calibration tab:

- Enable Work.com Calibration

To edit performance ratings:

- Create, Read, and Edit on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests

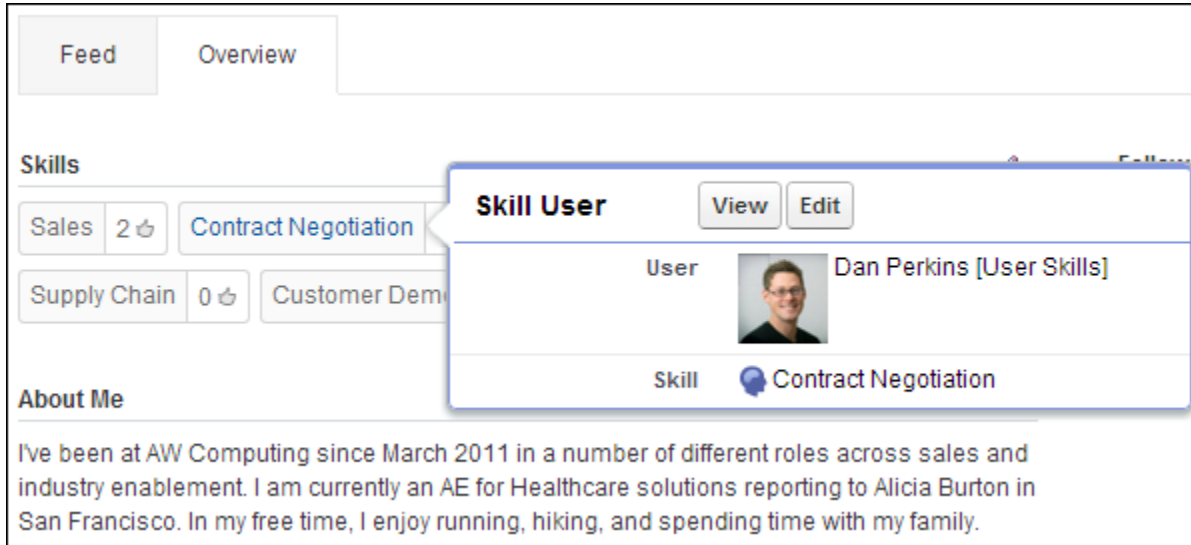
AND

Read on Performance Cycles

EDITIONS

Available in: Salesforce Classic

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




Administrators can change object permissions for the skill and endorsement objects to suit the needs of their organization. For example, you can configure object settings so users can't create skills, and only skills created by an administrator can be assigned to others. By default, supported user profiles have the ability to see, create, edit, and remove skills, and administrators have "Modify All Data" and "View All Data" permissions.

Additionally, administrators can change some skills settings on the Work.com Settings page. From Setup, enter *Work.com Settings* in the Quick Find box, then select **Work.com Settings**.

Edit Skills and Endorsements via record detail pages

Disables inline editing of skills and endorsements on Chatter profiles. Recommended if you have customized these objects with custom required fields.

 **Note:** Don't enable this setting if you want to use skills in Chatter profiles.

Generate feed posts when users add a new skill

Automatically creates a Chatter feed post when a user adds a new skill to a profile.

Enable Suggested Skills

Automatically suggests skills based on users' Chatter topics.

You can also install a package with additional reports and dashboards for thanks and skills features:

- [Thanks and Skills Reports and Dashboards \(Production Package\)](#)
- [Thanks and Skills Reports and Dashboards \(Sandbox Package\)](#)

[Skills Limitations](#)

Skills and endorsements have special behaviors and limitations.

SEE ALSO:

[Skills Overview](#)

[Skills Limitations](#)

[Object Permissions](#)

[Edit Object Permissions in Profiles](#)

[Enable or Disable Work.com Settings](#)

[Configure Work.com Reports](#)

Skills Limitations

Skills and endorsements have special behaviors and limitations.

Note the following restrictions:

- The Skills feature is not supported in Communities.
- Skill User and Endorsement records can only be deleted by the owner and users with the “Modify All Data” permission.
- To restore the users and endorsements associated with a deleted skill, retrieve the skill from the recycle bin. Creating a skill with the same name will not restore the prior associations.
- Users can only endorse others, not themselves. Users can’t be endorsed more than once by the same person on the same skill.

Administrators can endorse users on behalf of other users through the API.

- Users can’t see the skills widget on a Chatter profile page unless Chatter is enabled.

SEE ALSO:

[Skills Overview](#)

[Skills Customization](#)

[Enable or Disable Work.com Settings](#)

EDITIONS

Available in: Salesforce Classic

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

Manage Work.com

Use these Work.com features to track, manage, and improve your performance, thank and recognize coworkers, and more..

[Manage Performance Summaries](#)

Work.com performance summaries gather feedback about people in your company via a custom questionnaire.

[Measure Your Work with Goals](#)

Work.com Goals allow you to define, track, and measure your work. Access goals via the Goals tab or Chatter profile pages.

[Metrics](#)

Use metrics to track and surface your data.

[Recognize and Thank Coworkers](#)

Recognize and thank your coworkers by posting custom messages, badges, and rewards to their Chatter feed.

[Reward Funds](#)

Work.com Rewards allow you to tie tangible rewards to your badges. You can attach badges to tangible rewards from most digital gift codes globally.

[Skills Overview](#)

Skills allow users to share information about their professional expertise. With skills, users can discover, collaborate with, and endorse others based on their knowledge.

[Coaching Overview](#)

With Work.com Coaching, you can privately coach or be coached by anyone in your company. You can also share coaching spaces to include additional observers and participants. Access Coaching via the Coaching tab or your profile page.

[Configure Work.com Email Settings](#)

Enable Work.com email to receive notifications related to your Work.com feedback and rewards.

EDITIONS

Available in: Salesforce Classic

Work.com is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

Manage Your Feedback

EDITIONS

Available in: Salesforce Classic

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

Feedback requires a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition,** or **Developer Edition**, and is included in **Performance Edition**.

Work.com Feedback allows you to request and offer unsolicited feedback on a person or topic, and also respond to feedback related to performance summaries.

Feedback offers, feedback requests, and feedback related to performance summaries are all managed from the Feedback tab. The Feedback tab displays the recent feedback you've viewed by default, and you can filter to see different types of feedback records. For example, select **New Feedback Requests** to see feedback records that require their input. You can also create custom list views with different filter options.

The default feedback filters include:

- All Feedback—All feedback, including one-time feedback and performance summary feedback
- Declined Feedback Requests—All the feedback you've requested that others have declined
- Feedback About Me—All the completed feedback about you
- Feedback About My Team—All the completed feedback about your team
- Feedback About Others—Completed feedback about others
- Feedback About Topics—Completed feedback about topics
- New Feedback Replies—New replies to the feedback you've requested
- New Feedback Requests—New feedback requests for one-time feedback and performance summaries

USER PERMISSIONS

To view feedback:

- Read on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests
- AND
- Read on Performance Cycles

To create feedback:

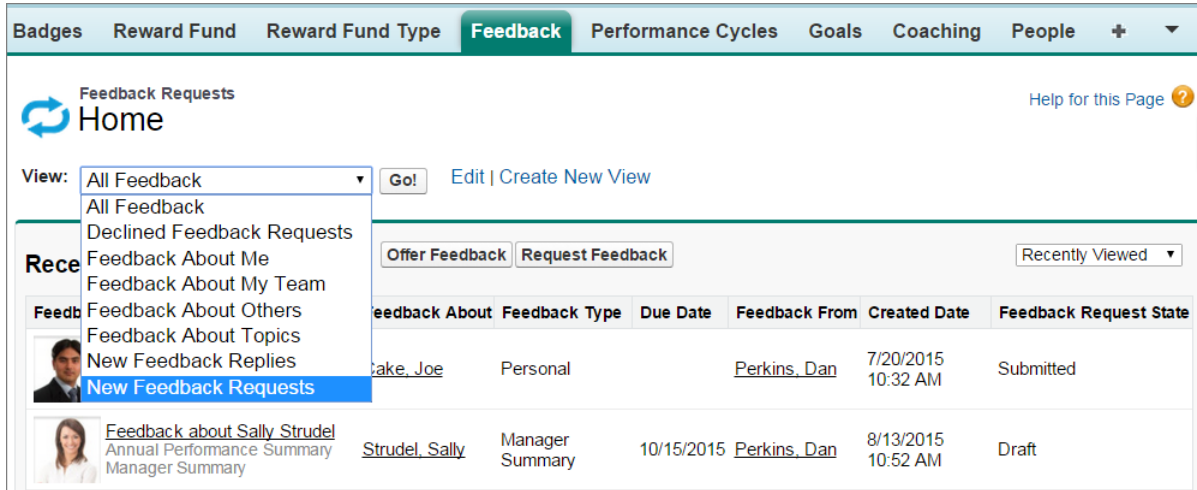
- Create on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests
- AND
- Read on Performance Cycles

To edit or submit feedback:

- Edit on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests
- AND
- Read on Performance Cycles

To delete feedback (only for admin users with MAD/VAD permissions):

- Delete on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests
- AND
- Read on Performance Cycles



On the feedback page, you can:

- View and filter your feedback list for new requests, replies, and other feedback
- Click a feedback record to view and edit details about the feedback
- Offer or request feedback

SEE ALSO:

- [Feedback Visibility](#)
- [Manage Performance Summaries](#)
- [Enable or Disable Work.com Settings](#)

Feedback Visibility

Visibility options are based on the type of feedback you choose.

Feedback Requested

Only people to whom you sent the feedback request and an administrator with “Modify All Data” or “View All Data” access can view your request.

Feedback Requested About	Person Receiving the Request	Person’s Manager	Administrator with MAD/VAD Access
Topic	✓		✓
Myself	✓		✓
Another User	✓		✓

Feedback Offered

You can only view feedback that is shared with you. For example, you won’t be able to view feedback about yourself that was shared only with your manager.

EDITIONS

Available in: Salesforce Classic

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

Feedback requires a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition,** or **Developer Edition**, and is included in **Performance Edition**.

Feedback Offered	Person	Person's Manager	Administrator with MAD/VAD Access
Person Only	✓		✓
Person and Manager	✓	✓	✓
Manager Only		✓	✓

SEE ALSO:

[Manage Your Feedback](#)

Manage Performance Summaries

Work.com performance summaries gather feedback about people in your company via a custom questionnaire.

Use the Feedback tab to view the performance summaries you need to complete. Use the drop-down menu to filter your performance summaries and other feedback. Select **New Feedback Requests** to see one-time feedback and performance summaries that require your input.

[Complete a Summary](#)

[Add Peers to a Performance Summary](#)

Invite peers to review your performance summary.

[Decline a Performance Summary Request](#)

Decline a performance summary request when feedback on that person or team is no longer required.

SEE ALSO:

[Add Peers to a Performance Summary](#)

[Complete a Summary](#)

[Decline a Performance Summary Request](#)

[Performance Summary Cycles Overview](#)

[Enable or Disable Work.com Settings](#)

EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition,** or **Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view the Performance tab:

- Read on Performance Cycles

To view performance summaries:

- Read on Performance Cycles

To create performance summaries:

- Create on Performance Cycles

To answer and submit performance summaries:

- Create, Read, and Edit on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests

AND

Read on Performance Cycles

Complete a Summary

1. On the Feedback tab, select **New Feedback Requests** from the feedback drop-down list.
2. Click **Go!**.
3. Select a performance summary.
4. Answer the questions in the summary. If available, click **Invite Peer** or **Invite Skip Level** to request reviews from others.

To see recent work, such as thanks, goals, metrics, and feedback, click **Customize Related Lists** on a performance summary's detail page. You can't quote recent work directly in your responses, but you can manually add this information.

EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To edit performance summaries:

- Create, Read, and Edit on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests
- AND
- Read on Performance Cycles

Feedback Request Detail		Save Draft	Submit	Reassign	Invite Peer	Invite Skip Level	Customize Related Lists
▼ Information							
Feedback From	Dan Perkins	Feedback Request State		Draft			
Feedback About	Sally Strudel	Feedback Type		Manager Summary			
Initiated By	Dan Perkins , 9/1/2015 2:47 PM	Performance Cycle		Annual Performance Summary			
		Last Submitted Date					
		Last Shared Date					
<div style="text-align: right;"> Save Draft Submit Reassign Invite Peer Invite Skip Level Customize Related Lists </div>							

5. When you're finished writing the summary, click **Submit** or click **Save Draft** to make changes at a later time.

You can view submitted summaries using filters on the Feedback tab, including summaries about you or your team.

SEE ALSO:

- [Manage Performance Summaries](#)
- [Add Peers to a Performance Summary](#)
- [Decline a Performance Summary Request](#)

Add Peers to a Performance Summary

Invite peers to review your performance summary.

1. On the Feedback tab, select **New Feedback Requests** from the feedback drop-down list.
2. Click **Go!**.
3. Select a performance summary.
4. If peer or skip reviews are included, at the top of the page, click **Invite Peer** or **Invite Skip Level**.
5. Type the name of the person you would like to invite and click **Save**.
The person's name appears in the list of invited people and they receive an email that asks them to complete a peer or skip level summary.

SEE ALSO:

- [Manage Performance Summaries](#)
- [Complete a Summary](#)
- [Decline a Performance Summary Request](#)

EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view performance summaries:

- Read on Performance Cycles

To add peers to performance summaries:

- Create, Read, and Edit on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests

AND

Read on Performance Cycles

Decline a Performance Summary Request

Decline a performance summary request when feedback on that person or team is no longer required.

1. On the Feedback tab, select **New Feedback Requests** from the feedback drop-down list.
2. Click **Go!**.
3. Select a performance summary.
4. Click **Decline**.
5. Click **OK** on the confirmation message.
 - You can only decline self, peer, and skip-level summaries.
 - Saved answers are preserved and remain in the declined summary.
 - Declined summaries can be found on the Feedback page with the All Feedback filter.
 - Click **Reopen** from a declined summary's detail page to reopen the summary. Reopened summaries appear in the New Feedback Requests list.
 - After a performance cycle "Finishes," declined summaries can't be reopened.

SEE ALSO:

[Manage Performance Summaries](#)

[Add Peers to a Performance Summary](#)

[Complete a Summary](#)

EDITIONS

Available in: Salesforce Classic

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

Performance summaries require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view the Performance tab:

- Read on Performance Cycles

To edit Performance Summaries:

- Create, Read, and Edit on Feedback, Feedback Questions, Feedback Question Sets, and Feedback Requests

AND

Read on Performance Cycles

Measure Your Work with Goals

Work.com Goals allow you to define, track, and measure your work. Access goals via the Goals tab or Chatter profile pages.

The Goals tab on a user's profile displays the goals for that person. The top-level Goals tab is a general list view that can be configured to display different lists of goals (such as My Goals, My Team's Goals, or Key Company Goals). The tabs and list views that appear may vary depending on how your administrator configured Work.com.

EDITIONS

Available in: Salesforce Classic

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

Goals requires a **Work.com** license, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition,** or **Developer Edition,** and is included in **Performance Edition.**

USER PERMISSIONS

To view goals:

- Read on Goals and Goal Links

To create goals:

- Create on Goals and Goal Links



To edit goals:

- Edit on Goals and Goal Links

To delete goals:

- Delete on Goals and Goal Links

The screenshot shows the Salesforce user profile for Gwen Brooks. The top navigation bar includes tabs for Profile, Chatter, People, Badges, Reward Fund, Reward Fund Type, Coaching, **Goals** (circled in red), Metrics, and Feedback. Below this, the breadcrumb trail reads "Chatter > People > Gwen Brooks". The profile page has a sub-navigation bar with tabs for Feed, Overview, Recognition, Coaching, and **Goals** (circled in red). The main content area is titled "Goals" and displays a table of goals:

Goal Name	Owner Name
 Meet Q2 Sales Quota	Gwen Brooks
 Get Sales Certification	Gwen Brooks

Click a goal in your list view to access the detail page.

Goals support Chatter feeds on goal records, so different users can collaborate in the feed and keep up-to-date on a goal's progress.

Goal
Get Sales Certification

Edit Layout | Printable View | Help for this Page ?

Show Feed

< Back to List: Users

Open Metrics [0] | Closed Metrics [2] | Parent Goals [1] | Subgoals [0] | Open Activities [0] | Activity History [0]

Goal Detail

Edit Delete Clone Sharing Adjust Weights

Goal Name	Get Sales Certification	Owner Name	Gwen Brooks [Change]
Image URL		Start Date	
Key Company Goal	<input type="checkbox"/>	Due Date	
Description			
Status	Completed	Progress	100%

▼ System Information

Created By	Gwen Brooks, 2/31/2015 5:32 PM	Last Modified By	Gwen Brooks, 3/31/2015 5:42 PM
Completion Date	3/31/2015 5:32 PM		

The goal detail page lists the metrics, tasks, events, notes, attachments, and other information related to a particular goal. Align goals with others by linking your goals with parent goals or subgoals.

Modify sharing settings to better control who can see and update your goals. For example, if goals in your organization are set to private by default, goal owners and administrators can share goals with select users or groups to increase collaboration and visibility. Choose between read-only and read/write access for more granular control over goal access.

On the Open Activities related list, click **New Task** or **New Event** to create a task or event tied to a specific goal. You can also create tasks or events for individual metrics, if desired.

Open Metrics

New Metric

Open Metrics Help ?

Action	Metric Name	Progress	Status	Due Date	Current Value	Initial Value	Target Value	Owner Name	Comment	Weight
Edit Del	Get 5000 in Sales	66	On Track	9/1/2015	3,300.00	0.00	5,000.00	Dan Perkins		60.00
Edit Del	Get Sales Certification	0	Postponed	9/1/2015				Dan Perkins		10.00

Closed Metrics

Closed Metrics Help ?

Action	Metric Name	Progress	Status	Due Date	Current Value	Initial Value	Target Value	Owner Name	Comment	Weight
Edit Del	Finish Sales Training	100	Completed	8/1/2015				Dan Perkins		30.00

Add metrics to your goals to calculate your progress. You can also link metrics to data in your favorite reports to keep track of your work in Salesforce. Assign weights to different metrics to precisely track the completion of the goal.

Create a Goal

Define, track, and measure your work with Work.com Goals.

SEE ALSO:

[Create a Goal](#)

[Metrics](#)

[Coaching Overview](#)

[Guidelines for Using Tasks](#)

[Considerations for Using Events and Calendars](#)

[Customize Chatter Feed Tracking](#)


[Enable or Disable Work.com Settings](#)

[Metrics](#)

Create a Goal

Define, track, and measure your work with Work.com Goals.

1. Click the top-level Goals tab.

If the Goals tab isn't displayed, select Work.com from the Lightning Platform app drop-down menu at the top-right or click  to the right of your current tabs and select it from the All Tabs page.

2. Click **New**.

3. Enter a name for the goal, and specify additional details.

You can adjust a goal's sharing settings after it's created. Note that all goal images are externally available.



Tip: To create a key company goal, select the **Key Company Goal** field. After the goal is created, click **Sharing** on the goal's detail page and share it with the All Internal Users group. Set the Access Level to Read Only to share it with the rest of your organization, or set it to Read/Write to allow everyone to collaborate on the goal.

4. Set the goal's status:

- Draft—The goal details are in draft state and haven't been finalized yet.
- Published—The goal details have been finalized and the goal is in progress.
- Completed—The goal is completed.
- Canceled—The goal is canceled and no longer applies.
- Not Completed—The goal is not completed.

5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

Goals requires a **Work.com** license, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view goals:

- Read on Goals and Goal Links

To create goals:

- Create on Goals and Goal Links

You can reassign goals to other users by clicking **Change** next to Owner Name on a goal's detail page. Metrics can be owned by different users, so be sure to reassign metrics to the appropriate owner as well.

SEE ALSO:

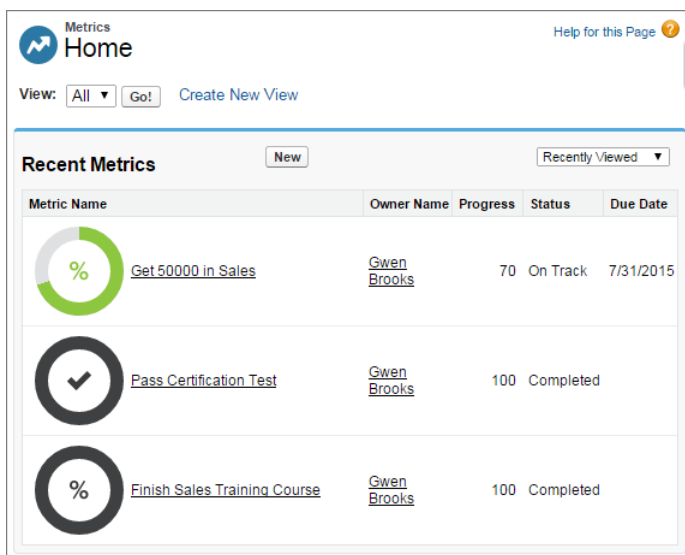
[Measure Your Work with Goals](#)

[Metrics](#)




Metrics

Use metrics to track and surface your data.

Create new metrics from the Metrics tab or from a goal detail page. Users can create standalone metrics or tie them to specific goals.



The screenshot shows the 'Metrics Home' interface. At the top, there's a 'View: All' dropdown and a 'Go!' button. Below that is a 'Create New View' button. The main section is titled 'Recent Metrics' and includes a 'New' button and a 'Recently Viewed' dropdown. The table below lists three metrics:

Metric Name	Owner Name	Progress	Status	Due Date
 Get 50000 in Sales	Gwen Brooks	70	On Track	7/31/2015
 Pass Certification Test	Gwen Brooks	100	Completed	
 Finish Sales Training Course	Gwen Brooks	100	Completed	

EDITIONS

Available in: Salesforce Classic

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

Metrics requires a **Work.com** license, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

Use Progress or Completion metrics to track the status of different goals that you set for yourself or others. Anyone with read/write access can refresh metric values, and metrics can also appear in relevant coaching spaces and performance summaries.

Anyone with read/write access can refresh metric values, and metrics can also appear in relevant coaching spaces and performance summaries.

[Create a Metric](#)

Track and surface your work with Work.com Metrics.

SEE ALSO:

[Create a Metric](#)

[Measure Your Work with Goals](#)

[Create a Goal](#)

Create a Metric

Track and surface your work with Work.com Metrics.

1. Click the Metrics tab.
Alternatively, you can click **New Metric** on a goal's detail page.
2. Click **New**.
3. Select a Progress or Completion record type and click **Continue**.
 - Progress metrics measure achievement based on how much is finished compared to a targeted value. They're ideal for tracking hard numbers and percentages. For example, create progress metrics to *Convert 50 Leads* or *Achieve 100% Customer Satisfaction*.
 - Completion metrics measure whether the metric was completed or not. They're ideal for tracking milestones or when you don't have metrics based on hard numbers. For example, create a completion metric to *Become Salesforce Certified*.
4. Enter a name for the metric and specify additional details.
5. For Progress metrics, enter a target value.
You can update the current value manually or link it to a Salesforce report. To link a metric value to a report:
 - a. In the Current Value field, click **From a Salesforce report**.
 - b. Select the Report Name.
 - c. Select the Summary Field.
6. Set the metric's status.
7. Click **Save**.

SEE ALSO:

[Metrics](#)

[Measure Your Work with Goals](#)

EDITIONS

Available in: Salesforce Classic

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

Metrics requires a **Work.com** license, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view metrics:

- Read on Metrics

To create metrics:

- Create on Metrics


To link metrics to reports:

- Create on Metric Data Links

Recognize and Thank Coworkers

Recognize and thank your coworkers by posting custom messages, badges, and rewards to their Chatter feed.

Work.com Recognition includes Thanks with unlimited custom badges and the ability to tie badges to tangible rewards such as gift cards. Managers can create reports and dashboards to view data on Recognition leaders. In addition to the required user permissions, your administrator must enable Thanks and Rewards for your organization. Depending on how your administrator configured Work.com, the Recognition tab and Badges tab may appear as top-level tabs. Additionally, the Recognition tab may appear as a subtab on your Chatter profile.

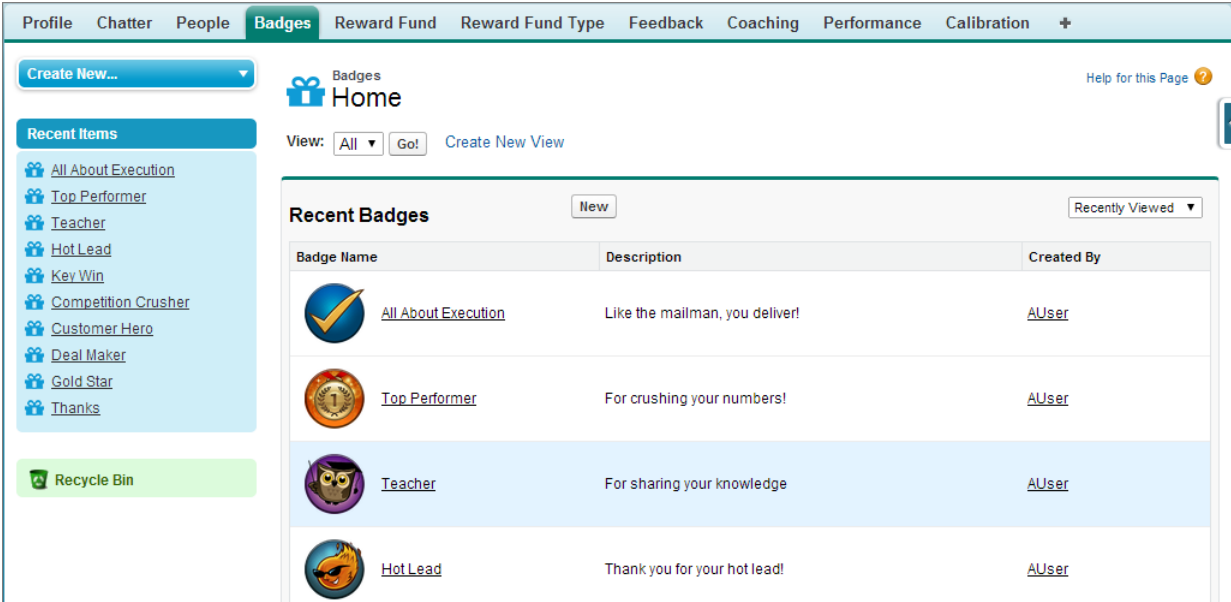
 **Note:** Users can create, edit, share, and give thanks badges without a Work.com license. However, users will still need a Work.com license to use badges tied to rewards. For more information about obtaining Work.com, contact Salesforce.

EDITIONS





Available in: Salesforce Classic

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

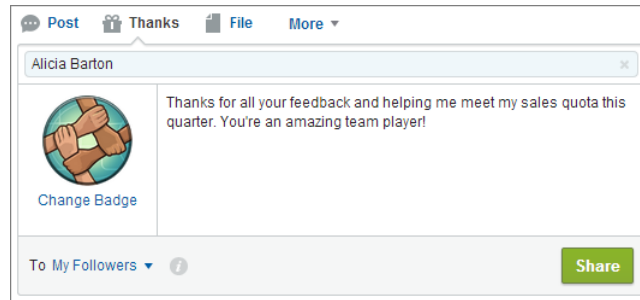
Rewards features require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.



The screenshot displays the Salesforce 'Badges' interface. At the top, there is a navigation bar with tabs for Profile, Chatter, People, **Badges**, Reward Fund, Reward Fund Type, Feedback, Coaching, Performance, and Calibration. Below the navigation bar, the 'Badges Home' page is visible. On the left, there is a 'Recent Items' sidebar with a list of badge categories: All About Execution, Top Performer, Teacher, Hot Lead, Key Win, Competition Crusher, Customer Hero, Deal Maker, Gold Star, and Thanks. Below this is a 'Recycle Bin' button. The main content area features a 'View: All Go!' and a 'Create New View' link. The 'Recent Badges' section is highlighted with a 'New' button and a 'Recently Viewed' dropdown. A table lists the following badges:

Badge Name	Description	Created By
 All About Execution	Like the mailman, you deliver!	AUser
 Top Performer	For crushing your numbers!	AUser
 Teacher	For sharing your knowledge	AUser
 Hot Lead	Thank you for your hot lead!	AUser

Access the library of available badges from the Badges tab. Click **New** to create a badge, or click a badge to see or edit badge details. You can only view the badges you have permission to give, and your ability to create or edit badges may be limited depending on how your feature is configured.



Give thanks badges from the Chatter publisher. Users are currently limited to giving badges to one user at a time. For more information, see [Give Thanks to Your Coworkers](#).

View the badges a user has received on the Recognition tab of their Chatter profile.

[Create a Badge](#)

Create custom badges to uniquely recognize and thank your coworkers.

[Configure Access to Thanks Badges](#)

Configure access to a thanks badge using its Access related list.

SEE ALSO:

[Create a Badge](#)

[Configure Access to Thanks Badges](#)


[Reward Funds](#)

[Create Reward Funds](#)

[Enable or Disable Work.com Settings](#)

Create a Badge

Create custom badges to uniquely recognize and thank your coworkers.

1. Click the Badges tab.
If the Badges tab isn't displayed, click  to the right of your current tabs and select it from the All Tabs page.
2. Click **New**.
3. Enter a name and description for the badge, add a badge image, and optionally assign rewards and badge limits.



Note:

- Only users with Rewards enabled can create a Rewards badge.
- Badges can't be transferred from a sandbox organization to a production organization.
- You can limit access to badge records with the Access related list, but badge images are externally available.

Badge Field	Description
Badge Name	The name of the badge.
Active	Indicates that the badge is active and available to give. This setting is enabled by default.
Reward Fund	Select a reward fund for this badge, if applicable.
Owner Name	The name of the badge owner.
Company Badge	Select to make this badge a company badge. Only users with the Chatter moderator permission can create and edit company badges. Company badges enable all users to give the badge.
Description	A description that explains the significance of the badge.
Image URL	A visual representation of the badge. Click the image field to select a picture from a directory on your computer. Badge images are stored at 128 x 128 pixels and are externally available.
Limit Number	The number of badges that are available. This can be per user or across all users. The default value is unlimited badges.
Limit Start Date	Indicates when the system begins to count the number of badges used. The default value is the date the badge is created.

EDITIONS

Available in: Salesforce Classic

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

Rewards features require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view the Badges tab:

- No additional user permission needed

To build a badge:

- Create on Documents
- The Restrict Custom Badge Creator setting is disabled by default. If the setting is enabled, users need the Create Custom Badge Definitions permission.

Badge Field	Description
Limit Type	Select Per User to have Limit Number apply to each user. Select Per Company to have Limit Number apply to the entire organization.

4. Click **Save**.


Access for custom badges is set to all internal users by default. To change the access to a custom badge, go to the badge detail page and click **Edit List** on the Access related list.

SEE ALSO:

- [Recognize and Thank Coworkers](#)
- [Configure Access to Thanks Badges](#)
- [Reward Funds](#)

Configure Access to Thanks Badges

Configure access to a thanks badge using its Access related list.

- 1.** From the **Badges** tab, click the badge you'd like to modify.
If you don't see the Badges tab, click  to the right of your current tabs and select it from the All Tabs page.
- 2.** Under the Access related list, click **Edit List**.
- 3.** Enter the public groups or users you want to grant access to.
You can only grant access to users with supported licenses.
- 4.** Click **Save**.

SEE ALSO:

- [Recognize and Thank Coworkers](#)
- [Create a Badge](#)
- [Reward Funds](#)

EDITIONS

Available in: Salesforce Classic

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

Rewards features require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

Reward Funds

Work.com Rewards allow you to tie tangible rewards to your badges. You can attach badges to tangible rewards from most digital gift codes globally.

Your administrator must enable Thanks and Rewards in your organization.

Work.com Rewards supports your choice of rewards programs or brands in addition to the default Amazon.com™ reward fund type. Reward information is stored in two objects, Reward Fund Type and Reward Fund. Here's a quick introduction to the differences between the two.

Reward Fund Type

This object holds the fixed information about a reward such as the currency type, redemption information, and CSV file upload details. Examples include Amazon.com™, iTunes™, or Starbucks™.

Reward Fund

This object holds the gifts codes and can only be tied to a single reward fund type. Each reward fund has a set value that you determine by purchasing gift codes for the specific denomination.

For example, a reward fund called Q1 US Rewards may contain codes linked to Amazon.com gift cards worth \$100 each. Another reward fund called Q1 Customer Service Rewards may contain codes linked to Amazon.com gift cards worth \$20 each. These reward funds would be related to the same reward fund type. However, a reward fund linked to Starbucks gift cards would be related to a different reward fund type.

You can create reward badges in three steps.

1. Create a reward fund type or use the default Amazon.com reward fund type.
2. Create a reward fund and upload reward codes.
3. Tie a thanks badge to a reward fund.

[Create Reward Fund Types](#)

Use reward fund types to specify general reward information, such as currency codes, redemption information, and CSV file upload details.

[Create Reward Funds](#)

Use reward funds to hold the gift codes related to a reward fund type.

SEE ALSO:

[Recognize and Thank Coworkers](#)

[Create Reward Fund Types](#)

[Create Reward Funds](#)

[Create a Badge](#)

EDITIONS

Available in: Salesforce Classic

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

Rewards features require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition,** or **Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view Reward Funds:


- Read on Reward Funds

To create Reward Funds:

- Create on Rewards
Create on Reward Funds

Create Reward Fund Types

Use reward fund types to specify general reward information, such as currency codes, redemption information, and CSV file upload details.

1. Click the Reward Fund Type tab.
If the Reward Fund Type tab isn't available, click  to the right of your current tabs and select it from the All Tabs page.
2. Click **New**.
3. Enter the Reward Fund Type details.

Information

Field	Description
Reward Fund Type Name	The name of the reward fund type. Try to pick something descriptive, like Amazon.CA (Canada) or Starbucks (US).
Credit System	Select Gift Codes to tie your rewards to a cash reward. Select Points if the reward is not tied to cash. Reward Fund Types that use Points ignore the Currency Code field.
Active	Whether the reward fund type is active or not.
Owner Name	The owner of the reward fund type.
Currency Code	The type of currency.
Predefined	Read-only setting that indicates if a reward fund type is predefined, like the default Amazon.com type. You can't change the name, credit system, or currency code on predefined reward fund types. Predefined fund types are system-generated and can't be edited.

Redemption

Field	Description
Redemption Url	The URL where the reward is redeemed. This field is optional based on the type of reward code. For reward codes that are links, do not enter a redemption URL.
Redemption Information	The instructions for redeeming the reward, including any extra steps the user may need to take to redeem the reward.
Terms and Disclaimer	Extra legal information about the reward fund type.

Upload Configuration

Field	Description
Reward Code Column	The column in a CSV file that specifies the reward codes. The upload uses the second column by default. Enter a number to specify a different column.

EDITIONS

Available in: Salesforce Classic

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

Rewards features require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view Reward Fund Types:

- Read on Reward Fund Types

To create Reward Fund Types:

- Create on Reward Fund Types

Read and Create on Reward Funds

Read and Create on Rewards

Upload Configuration

Field	Description
Reward Value Column	The column in a CSV file that specifies the reward values. The upload uses the third column by default. Enter a number to specify a different column.

- Click **Save**.

SEE ALSO:

[Reward Funds](#)

[Create Reward Funds](#)


[Create a Badge](#)

[Recognize and Thank Coworkers](#)

Create Reward Funds

Use reward funds to hold the gift codes related to a reward fund type.

Users can build reward badges from the reward funds they created. Reward funds can include Amazon.com™ gift cards purchased from one of our third-party vendors, such as TangoCard™, or different rewards programs beyond Amazon.com.

- Click the Reward Fund tab.
 - If the Reward Fund tab isn't available, click  to the right of your current tabs and select it from the All Tabs page.
- Click **New**.
- Name your fund, select the Reward Fund Type, and enter the reward value.
- Click **Save**.
- Upload or enter your gift codes.
 - To upload gift codes through a CSV file, select **Upload CSV**, then select **Choose File**. Select a CSV file and click **Upload**.

By default, the upload uses the second column for reward codes and the third column for reward values. However, you can set these to different values on the related reward fund type. Here's an example of how you might format your CSV file:

	A	B	C
1	Sequence Number	Reward Code	Reward Value
2	1	1111-222222-3333	10
3	2	1111-222222-4444	10
4	3	1111-222222-5555	10
5	4	1111-222222-6666	10
6	5	1111-222222-7777	10

EDITIONS

Available in: Salesforce Classic

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

Rewards features require a license to **Work.com**, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view Reward Funds:

- Read on Reward Funds

To create Reward Funds:

- Create on Reward Funds
- Create on Rewards

 **Note:** Make sure the reward code data begins on the second row of the CSV file. The first row is seen as the header row and is not uploaded.

- To manually enter gift codes, select **New Reward**. Enter the gift code and click **Save**.

SEE ALSO:

[Recognize and Thank Coworkers](#)

[Reward Funds](#)

[Create Reward Fund Types](#)

[Create a Badge](#)

[Recognize and Thank Coworkers](#)

Skills Overview

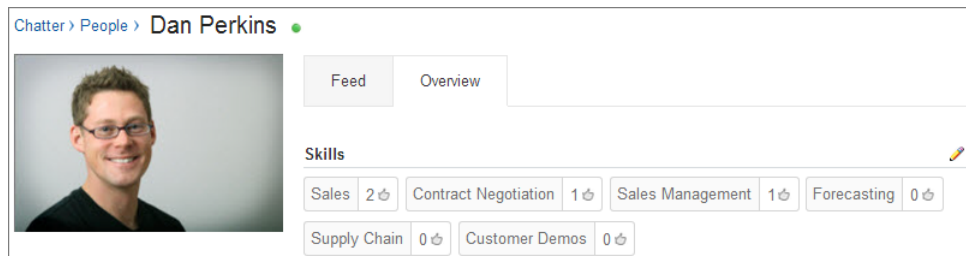
Skills allow users to share information about their professional expertise. With skills, users can discover, collaborate with, and endorse others based on their knowledge.

The Skills feature makes it easier to identify experts in different areas. Users can add or remove skills on their Chatter profile page or on record detail pages, and other users can endorse those skills. Use the global search bar to search for experts with specific skills.

EDITIONS

Available in: Salesforce Classic

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



The screenshot shows a Chatter profile for Dan Perkins. The profile includes a photo, a name, and a status indicator. Below the photo are tabs for 'Feed' and 'Overview'. The 'Skills' section is visible, showing a list of skills with endorsement counts:

Skill	Endorsements
Sales	2
Contract Negotiation	1
Sales Management	1
Forecasting	0
Supply Chain	0
Customer Demos	0

[Add a Skill Via Record Detail Pages](#)

Add skills to share your professional expertise.

[Remove a Skill Via Record Detail Pages](#)

Remove a skill if it no longer applies.

[Endorse a Skill Via Record Detail Pages](#)

Endorse a user's skill to promote their expertise in a specific area.

SEE ALSO:

[Enable or Disable Work.com Settings](#)

[Skills Customization](#)

[Skills Limitations](#)

[Add a Skill Via Record Detail Pages](#)

Add a Skill Via Record Detail Pages

Add skills to share your professional expertise.

If the skill already exists, use the global search bar to find the skill, and click **Add to My Profile** on the skill record.

1. From your personal settings, enter *Advanced User Details* in the *Quick Find* box, then select **Advanced User Details**. No results? Enter *Personal Information* in the *Quick Find* box, then select **Personal Information**.
2. In the User Skills related list, click **New Skill**.
3. Enter the name of your skill and an optional description.
4. Click **Save**.
The skill is created.
5. Click **Add To My Profile**.
6. Click **Save**.
The skill is associated with you.

You can also add skills on Chatter profile pages.

SEE ALSO:

[Skills Overview](#)

[Remove a Skill Via Record Detail Pages](#)

[Endorse a Skill Via Record Detail Pages](#)

[Personalize Your Salesforce Experience](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To add skills:

- Create on Skills and Skill Users

Remove a Skill Via Record Detail Pages

Remove a skill if it no longer applies.

1. From your personal settings, enter *Advanced User Details* in the *Quick Find* box, then select **Advanced User Details**. No results? Enter *Personal Information* in the *Quick Find* box, then select **Personal Information**.
2. In the User Skills section, click **Del** next to the skill you want to remove.
3. Click **OK**.

The skill is no longer associated with you, but it's not deleted. Only skill owners with the proper permissions and users with "Modify All Data" can delete skills.

You can also remove skills on Chatter profile pages.

SEE ALSO:

[Skills Overview](#)


[Add a Skill Via Record Detail Pages](#)

[Endorse a Skill Via Record Detail Pages](#)

[Personalize Your Salesforce Experience](#)

Endorse a Skill Via Record Detail Pages

Endorse a user's skill to promote their expertise in a specific area.

1. Go to the profile page of the user you'd like to endorse.
2. Click  in the upper right corner and select **User Detail**.
3. In the User Skills section, click the Skill User Name or Endorsements link next to the skill you'd like to endorse.
4. Click **Add Endorsement**.
5. Click **Save**.

You can also endorse skills on Chatter profile pages.

SEE ALSO:

[Skills Overview](#)

[Add a Skill Via Record Detail Pages](#)

[Remove a Skill Via Record Detail Pages](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To remove skills:

- Read on Skills
- AND
- Delete on Skill Users

EDITIONS

Available in: Salesforce Classic

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

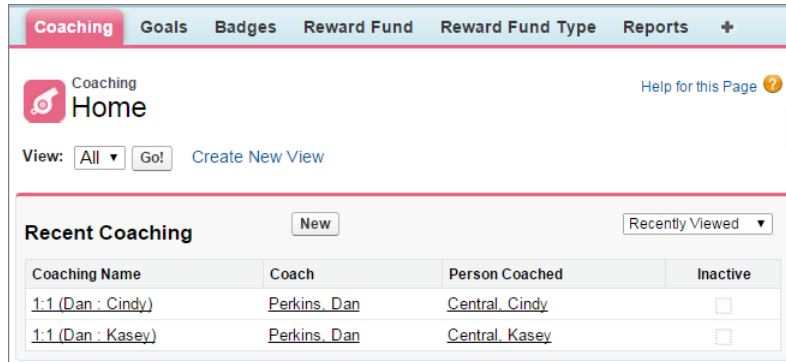
USER PERMISSIONS

To add endorsements to skills:

- Create on Endorsements
- AND
- Read on Skills and Skill Users

Coaching Overview

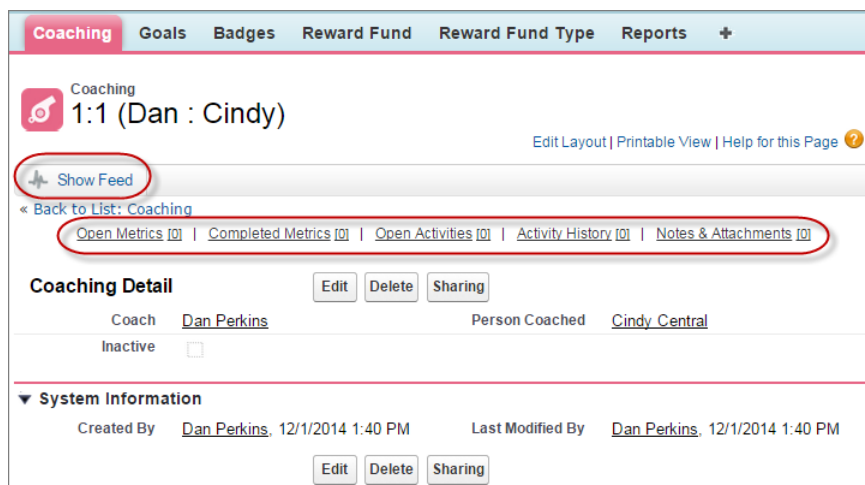
With Work.com Coaching, you can privately coach or be coached by anyone in your company. You can also share coaching spaces to include additional observers and participants. Access Coaching via the Coaching tab or your profile page.



On the coaching page you can:

- View a list of your coaching spaces.
You should create your own filters (such as My Coaches, People I Coach, and Inactive Relationships) that are suitable for your organization.
- Click **New** to create a coaching space. You can have as many coaching spaces as you want.

Click a coaching space in your list view to access the detail page.



From this page you can:

- Click **Show Feed** to see the feed related to a coaching space.
Your administrator must enable Chatter feed tracking to display the feed.
- Access the goals, metrics, activities, notes, and attachments related to a particular coaching space.

EDITIONS

Available in: Salesforce Classic

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

Coaching requires a **Work.com** license, which is available as an add-on license for **Professional Edition, Enterprise Edition, Unlimited Edition, or Developer Edition**, and is included in **Performance Edition**.

USER PERMISSIONS

To view coaching spaces:

- Read on Coaching

To create coaching spaces:

- Create on Coaching

- Set coaching spaces to inactive when they're no longer useful. This retains the record history, and the coaching space can also be reactivated anytime.
- Delete coaching spaces if you have the right access level.

SEE ALSO:

[Measure Your Work with Goals](#)

[Guidelines for Using Tasks](#)

[Considerations for Using Events and Calendars](#)

[Customize Chatter Feed Tracking](#)

[Enable or Disable Work.com Settings](#)

Configure Work.com Email Settings

Enable Work.com email to receive notifications related to your Work.com feedback and rewards.

1. From your personal settings, enter *work.com* in the **Quick Find** box, then select **Email Settings** under Work.com.
2. In the General section, select **Receive emails**.
You can deselect this option at any time, if you no longer want to receive any Work.com emails.
3. In the Personal section, select which type of emails you want to receive.

Email Setting	Description
Someone gives me a reward	Select this option, if you want to receive an email when someone gives you a reward.
I am asked for a feedback, or receive feedback to a question I've asked	Select this option, if you want to receive an email when someone asks for your feedback or someone answers a question you asked.

4. Click **Save**.

SEE ALSO:

[Enable or Disable Work.com Settings](#)

[Personalize Your Salesforce Experience](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To configure email settings:

- No additional permissions required

Manage Multiple Currencies

Your organization can set up the ability to use multiple currencies in opportunities, forecasts, quotes, reports, and other data.

1. [Enable multiple currencies](#) for your organization.
2. To designate your corporate currency, from Setup, enter *Manage Currencies* in the **Quick Find** box, then select **Manage Currencies**, and then click **Change Corporate**.
3. To activate more currencies for your organization, click **New** in the Active Currencies related list.
4. To use dated exchange rates, [enable advanced currency management](#).
5. Set conversion rates for new currencies. See [Edit Conversion Rates](#). If you have enabled advanced currency management, see [Editing Dated Exchange Rates](#) on page 447.

Using Multiple Currencies

International organizations can use multiple currencies in opportunities, forecasts, reports, quotes, and other currency fields. The administrator sets the “corporate currency,” which reflects the currency of the corporate headquarters. The administrator also maintains the list of active currencies and their conversion rates relative to the corporate currency. The active currencies represent the countries in which the organization does business. Only active currencies can be used in currency amount fields.

Each user has a personal currency, which is used as the default currency in quotas, forecasts, opportunities, quotes, and reports. Users can also create opportunities and enter amounts using other active currencies.

All standard and custom object records with currency fields have a field that specifies the currency to use for all amount fields in that record. (Click **Edit** to display this editable **Currency** field on a record.) For example, you can set the **Account Currency** to “USD-U.S. Dollars” so that the **Annual Revenue** shows in dollars for one of your American accounts. All currency amounts are displayed in the default currency of the record. Administrators can choose whether to also display, in parentheses, the user’s personal currency if it is different from the currency of the record. When you change the default currency of a record, currency amounts are not converted. They display the new currency code.

 **Note:** If your organization uses [advanced currency management](#), the opportunity close date determines which conversion rate to use when displaying currency amounts.

Depending on the forecasting version you have, forecast currency amounts are converted to the user’s personal currency. Also, for managers, their team’s opportunities, forecasts, quotes, and other data are converted and rolled up to the manager’s personal currency. The manager can also drill down to see the data in the native currency. All conversion and roll-ups happen automatically.

Amounts in reports are shown in their original currencies, but can be displayed in any active currency. You can change the currency used for report totals by selecting a currency from **Show > Currencies**. The default value is your personal currency. For any amount, you can choose to display the **Converted** column—for example, **Annual Revenue Converted**—which shows amounts in the currency you select.

Custom formula fields are not tied to any particular currency. If the result of a formula field is a currency amount, it displays in the currency of the associated record. This rule is also true for cross-object formulas that reference merge fields with different currencies, and formulas in workflow rules and approval processes. However, workflow rules and approval processes that use filters instead of formulas convert all currency values to the corporate currency.

If currency fields are referenced in Apex, you can’t disable multiple currencies for your organization. For example, if Apex code references the **Account Currency** field (represented as `CurrencyIsoCode` in the code), you can’t disable multiple currencies.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view currencies:

- View Setup and Configuration

To change currencies:

- Customize Application

[Enable Multiple Currencies](#)

Before your organization can use multiple currencies, the feature must be turned on.

[Considerations for Enabling Multiple Currencies](#)

Enabling multiple currencies introduces permanent changes in your organization. Before proceeding, be aware of these implications to ensure a smooth transition for your organization.

[Activate and Deactivate Currencies](#)

For orgs with multiple currencies, specify which currencies are supported by activating or deactivating currencies.

[About Advanced Currency Management](#)[Edit Dated Exchange Rates](#)

Add, view, change, or delete dated exchange rates.

SEE ALSO:

[Administrator setup guide: Using Multiple Currencies](#)

[Enable Multiple Currencies](#)

Enable Multiple Currencies

Before your organization can use multiple currencies, the feature must be turned on.

To enable multiple currencies in your organization:

1. Familiarize yourself with the [implications of enabling multiple currencies](#).
2. In Setup, enter *Company Information* in the **Quick Find** box, then select **Company Information** and click **Edit**. Ensure that your selected currency locale is the default currency that you want to use for current and future records. Enable **Activate Multiple Currencies**, and then save your changes.



Note: If Customizable Forecasting is enabled on your org, contact Salesforce Customer Support for multi-currency enablement.

SEE ALSO:

[Considerations for Enabling Multiple Currencies](#)

[Manage Multiple Currencies](#)

[About Advanced Currency Management](#)

EDITIONS


Available in: Salesforce Classic

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

Considerations for Enabling Multiple Currencies

Enabling multiple currencies introduces permanent changes in your organization. Before proceeding, be aware of these implications to ensure a smooth transition for your organization.

- After enabled, multiple currencies can't be disabled for your organization.
- If Customizable Forecasting is enabled on your org, contact Salesforce Customer Support for multi-currency enablement. The enablement process temporarily locks your org, preventing all integration processing and user logins. The lockout duration depends on the data space used by your org.
- Upon enablement, existing records are stamped with a default currency code that you provide in your enablement request. For example, if your organization contains records using USD and EUR, switch them all to the same default currency before enablement. Support for this type of conversion is also available as a Salesforce paid implementation service.
- Standard and custom objects, such as Account, Lead, Case, Opportunities, Opportunity Products, Opportunity Product Schedules, and Campaign Opportunities, have currency fields that support multiple currencies. Reports related to these objects and fields also support multiple currencies. By default, page layouts for these objects have multi-currency-compatible fields in which you can specify the currency for the record. Typically, these fields are available only when creating a record or editing an existing record. The selected currency is used for the primary amount field.
- After enablement, the primary currency displays as usual and, optionally, a secondary currency amount appears in parentheses. The primary currency is typically the default corporate currency, unless it's overridden at the record level. The amount shown in parentheses is the user's personal default currency, calculated based on the conversion rate settings defined in your organization. To control whether the converted currency amount appears, enable or disable parenthetical currency conversion from the Manage Currencies page.
- In reports, the primary currency reflects either the default corporate currency or the currency selected for the record. The secondary currency reflects the personal default currency of the user running the report, or the currency specified in the report criteria.
- Users can specify a personal default currency on their personal information page. If parenthetical currency conversion is enabled, the personal default currency displays as the secondary currency amount (converted amount). Changing the personal default currency updates the converted amount in real time.
- After a currency is added to an organization's list of supported currencies, it can't be deleted from the administrator's list of currencies, even when it's deactivated. The presence of inactive currencies in the administrator's list is a cosmetic issue that doesn't affect end users. A deactivated currency isn't visible to end users, but remains visible to administrators. Salesforce recommends that you keep this issue in mind during testing and use only those currencies that you eventually plan to use in your organization.
- After enablement, all currency fields display the ISO code of the currency before the amount. For example, \$100 displays as USD 100.

 **Note:** If you have only one currency in your multi-currency organization, you can set a preference to display currency symbols instead of ISO codes. To display currency symbols, search Setup for *User Interface*, and then select **Show currency symbols instead of ISO codes** in the Currency Display Settings section of the User Interface settings page. If you later enable more currencies in your organization, ISO codes display, and this preference is no longer available. This preference applies only in the standard Salesforce user interface.


- By default, all converted amounts in your organization rely on the current conversion rates defined for your organization. Conversion rates must be set and updated manually. Changing the exchange rate automatically updates converted amounts on all records, including on closed opportunities.

You can opt to use dated exchange rates by using [advanced currency management](#) to track historical exchange rates. Advanced currency management allows you to maintain a list of exchange rates by date range. Converted currency amounts on opportunities display based on the specified Close Date, regardless of the opportunity stage. If the Close Date changes to a different exchange rate period, changing the Close Date impacts converted amounts.

EDITIONS

Available in: Salesforce Classic

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

 **Note:** Dated exchange rates aren't used in forecasting, currency fields in other objects, or currency fields in other types of reports.

SEE ALSO:

- [Administrator setup guide: Using Multiple Currencies](#)
- [Enable Multiple Currencies](#)
- [Manage Multiple Currencies](#)
- [About Advanced Currency Management](#)

Activate and Deactivate Currencies

For orgs with multiple currencies, specify which currencies are supported by activating or deactivating currencies.


- **Active currencies** represent countries in which your org does business. Only active currencies can be entered in opportunities, forecasts, and other items. Once you activate a currency, you can never permanently delete it.
- **Inactive currencies** are currencies that your org no longer uses. You can have existing records that use inactive currencies, but you can't enter new amounts that use inactive currencies.

To activate new currencies:

1. From Setup, enter *Manage Currencies* in the **Quick Find** box, then select **Manage Currencies**.
2. Click **New** in the Active Currencies related list.
3. Select a currency. Currencies are alphabetized using their ISO currency code.
4. Enter the conversion rate relative to your corporate currency.
5. Specify the number of decimal places to display for amounts in this currency.
6. Click **Save**.

To activate a currency from the list of inactive currencies, click **Activate** next to the currency.

To deactivate a currency, click **Deactivate** next to the currency. You can't deactivate the corporate currency. Deactivating a currency does not alter amounts in items that use that currency. However, you can no longer enter new amounts using the inactive currency.

 **Note:** Deactivating a currency that is set as a user's personal currency automatically resets the user's currency to the corporate currency.

SEE ALSO:

- [Manage Multiple Currencies](#)
- [Edit Conversion Rates](#)
- [About Advanced Currency Management](#)
- [Administrator setup guide: Using Multiple Currencies](#)

EDITIONS

Available in: Salesforce Classic

Available in: **Group, Professional, Enterprise, Performance, Unlimited, Develop,** and **Database.com** Editions

USER PERMISSIONS

To view currencies:

- View Setup and Configuration

To change currencies:

- Customize Application

About Advanced Currency Management


Advanced currency management allows you to manage dated exchange rates within opportunities using Salesforce. Dated exchange rates allow you to map a conversion rate to a specific date range. For example, the exchange rate on January 1 was 1 USD to 1.39 AUD, but on February 1, it changed to 1 USD to 1.42 AUD. Your opportunities that closed between January 1 and February 1 use the first exchange rate (1 = 1.39), while opportunities that closed after February 1 used the second exchange rate (1 = 1.42).

Dated exchange rates are defined using a start date and a conversion rate. Each rate is in effect until either the end of time or the day before the next start date for that currency. The time between one start date and the next start date is called the exchange rate date range. These ranges can be as small as a day and as large as all time.

To enable or disable advanced currency management, see [Enabling or Disabling Advanced Currency Management](#) on page 446.

When advanced currency management is first enabled, your existing exchange rates automatically become the first set of dated exchange rates. These rates are valid for all time, until you define another set of exchange rates. For more information, see [Editing Dated Exchange Rates](#) on page 447.

If you disable advanced currency management, all currency conversions use the static conversion rate. See [Edit Conversion Rates](#).

 **Note:** Although dated exchange rates aren't supported in Lightning Experience and Salesforce app some limited functionality is available. Opportunities display the correct amount if the CloseDate field is on the page layout for opportunities. Because page layouts control who sees what on object records, only users who have this page layout assigned to them see the correct amount. Otherwise, the amount shown reflects the original amount before a dated exchange rate was applied.

Advanced Currency Management Considerations

- Dated exchange rates are used for opportunities, opportunity products, opportunity product schedules, campaign opportunity fields, opportunity splits, and reports related to these objects and fields. Dated exchange rates are not used in forecasting, currency fields in other objects, or currency fields in other types of reports.
- Organizations with advanced currency management support roll-up summary fields between two advanced currency management objects. For example, roll-up summary fields are supported from an opportunity line object to its opportunity object, because both are advanced currency management enabled. However, if you enable advanced currency management, you can't create roll-up summary fields that calculate currency on the opportunity object rolling up to the account object. You also can't filter on the opportunity currency field on the account object. All existing currency-related roll-up summary fields on the opportunity object are disabled and their values are no longer calculated. If your organization enables advanced currency management, delete any currency roll-up summary fields using opportunities and accounts or opportunities and custom objects.
- Campaign opportunity fields use dated exchange rates when calculating the amount in the campaign currency. However, they don't use dated exchange rates when converting those amounts to the user currency.
- Cross-object formulas always use the static conversion rate for currency conversion.
- If advanced currency management is enabled, you can't bind Visualforce pages that use `<apex:inputField>` or `<apex:outputField>` components to currency fields that support advanced currency management.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable advanced currency management:

- Customize Application

To view currencies:

- View Setup and Configuration

To change currencies:

- Customize Application

[Enable or Disable Advanced Currency Management](#)

SEE ALSO:

[Manage Multiple Currencies](#)

[Activate and Deactivate Currencies](#)

[Administrator setup guide: Using Multiple Currencies](#)

Enable or Disable Advanced Currency Management

To enable advanced currency management:

1. Enable multiple currencies for your organization. For more information, see [Manage Multiple Currencies](#).
2. From Setup, enter *Manage Currencies* in the Quick Find box, then select **Manage Currencies**.
3. Click **Enable**.
4. When prompted, select *Yes, I want to enable Advanced Currency Management* and click **Enable**.

When advanced currency management is first enabled, your existing exchange rates automatically become the first set of dated exchange rates. These rates are valid for all time, until you define another set of exchange rates.

To disable advanced currency management:

1. From Setup, enter *Manage Currencies* in the Quick Find box, then select **Manage Currencies**.
2. Click **Disable**.
3. When prompted, select *Yes, I want to disable Advanced Currency Management* and click **Disable**.

If you disable advanced currency management, all currency conversions use the static conversion rate. See [Edit Conversion Rates](#).

When advanced currency management is enabled, Visualforce `<apex:inputField>` and `<apex:outputField>` components cannot display currency fields.

SEE ALSO:

[About Advanced Currency Management](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable advanced currency management:


- Customize Application

Edit Dated Exchange Rates

Add, view, change, or delete dated exchange rates.

To add new dated exchange rates:

1. From Setup, enter *Manage Currencies* in the Quick Find box, then select **Manage Currencies**.
2. Click **Manage Dated Exchange Rates**.
3. Click **New Exchange Rates**.
4. Enter the date that the exchange rates go into effect.
5. Enter the exchange rates.

 **Note:** The exchange rates default to the current exchange rate. If you do not want to set a new exchange rate for a currency, delete the exchange rate (leave the field blank).

6. Click **Save** to save the new dated exchange rates.

To view existing dated exchange rates:

1. From Setup, enter *Manage Currencies* in the Quick Find box, then select **Manage Currencies**.
2. Click **Manage Dated Exchange Rates**.
3. Select the date range you want to view either by entering the date and clicking **Go!**, or by selecting **Previous Range** or **Next Range**.

To delete a dated exchange rate for a particular currency:

1. From Setup, enter *Manage Currencies* in the Quick Find box, then select **Manage Currencies**.
2. Click **Manage Dated Exchange Rates**.
3. Click the name of the currency you want to edit.
4. Click **Del** for the date range you want to delete.

If the date range you want is not displayed, enter it in the *Show all rates with start dates between* fields and click **Go!**

To edit your dated exchange rates for a particular currency:

1. From Setup, enter *Manage Currencies* in the Quick Find box, then select **Manage Currencies**.
2. Click **Manage Dated Exchange Rates**.
3. Click the name of the currency you want to edit.
4. Click **Edit** for the date range you want to edit. If the date range you want is not displayed, enter it in the *Show all rates with start dates between* fields and click **Go!**
5. Edit the exchange rate, setting it to the new value for the date range, and click **Save**.

SEE ALSO:

[About Advanced Currency Management](#)

[Manage Multiple Currencies](#)

[Activate and Deactivate Currencies](#)

[Administrator setup guide: Using Multiple Currencies](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view currencies:

- View Setup and Configuration

To change currencies:

- Customize Application

Guide Users with Path

Path guides your users along the steps in a process, such as working an opportunity from a fresh lead to a successfully closed deal. Path is available for accounts, leads, campaigns, opportunities, quotes, contracts, orders, cases, and custom objects in Lightning Experience, and for accounts, campaigns, and opportunities in all versions of the Salesforce app.

EDITIONS

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

USER PERMISSIONS

To set up a path:

- Modify All Data

The screenshot shows the Salesforce interface for a Lead record. At the top, the lead is identified as 'Mr. Damien Joly' with a 'LEAD' icon. Action buttons for 'Convert', 'Edit', and 'Delete' are visible. Below the header, a table lists key information: Title (Owner), Company (Alouette Commer...), Phone (415-555-9877), and Email (damien@alouette.com). A path is displayed with three steps: 'Open' (highlighted in green with a checkmark), 'Contacted', and 'Converted'. A 'Mark Status as Complete' button is on the right. Below the path, two sections are highlighted with red boxes and numbered 1, 2, and 3. Section 1 is the path itself. Section 2 is the 'KEY FIELDS' section, which includes: Name (Mr. Damien Joly), Company (Alouette Commercial Loans), Phone (415-555-9877), Website (http://www.alouettecommercialloans.com), and Annual Revenue (USD 450,000.00). Section 3 is the 'GUIDANCE FOR SUCCESS' section, which includes: Respond to lead within 5 minutes, and Visit your lead's website to learn about their business.

You can set up one path for each available record type. Steps for each path (1) are based on values in the picklist you select when you set up the path. Customize the order of values in the picklist to re-order the steps in the path.

Select up to five key fields to focus users on the most critical information (2). At each step on the path, help users succeed with handy step-specific guidance, such as tips, links, and company policy information (3).

To enable Path and set up new paths, from Setup, enter *Path Settings* in the *Quick Find* box. Enable **Remember User's Path Preferences** to let users decide whether the path remembers its previous state or is always closed when the page loads.

[Path Considerations](#)

Understand how Path behaves.

SEE ALSO:

[Path Considerations](#)

Path Considerations

Understand how Path behaves.

- You can set up one path for each available record type.
- You can include a maximum of five key fields and 1,000 characters of rich text in each step in a path.
- You can't require different fields in different steps using the page layout. You can, however, set up validation rules based on the path step.
- Dependent fields are ignored when moving an opportunity stage using Path.
- Although not a limitation, keep in mind that deleting a record type that has a corresponding path also deletes the path.
- Validation rules appear as page-level messages, even if you configure the rules to appear near the fields.
- For lead paths, we recommend that you place Unqualified statuses at the beginning of the paths.
- Images can't be included in packages for Path.
- Custom values in standard picklist fields aren't packagable.

EDITIONS

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

SEE ALSO:

[Guide Users with Path](#)

More Sales Features

Locate documentation for earlier versions of features we've upgraded.

[Customizable Forecasting](#)

Sales forecasts represent the best estimate of how much revenue your sales team can generate. They give managers and executives a view of your overall business no matter how dispersed your sales teams are. Because forecasting is so universal, Customizable Forecasting is a flexible solution for even the most advanced requirements.

[Territory Management](#)

Territory Management makes it easy for your sales team to structure Salesforce data the same way your sales territories are structured.


[Salesforce for Wealth Management](#)

[Drive Sales with Partners](#)

Partners are the companies with which you collaborate to close your sales deals. For each opportunity or account you create, the Partners related list allows you to store information about your partners and the roles they play in the opportunity or account. A partner must be an existing account within Salesforce.

Customizable Forecasting

Sales forecasts represent the best estimate of how much revenue your sales team can generate. They give managers and executives a view of your overall business no matter how dispersed your sales teams are. Because forecasting is so universal, Customizable Forecasting is a flexible solution for even the most advanced requirements.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

[Set Up Customizable Forecasting](#)

Enable Customizable Forecasting for your sales team. Then define settings and set up features to get the most from Customizable Forecasting.

[Predict Sales with Customizable Forecasting](#)

Customizable Forecasting is a flexible solution for estimating how much revenue your sales team can generate or how many items your sales team can sell. Your Salesforce admin sets up Customizable Forecasting to reflect how your sales team forecasts sales. With it, you can forecast monthly or quarterly, use different dates when applying amounts to forecasts, forecast based on revenue or quantity or both, and define additional quotas based on product families.


EDITIONS

Available in: Salesforce Classic

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

Set Up Customizable Forecasting

Enable Customizable Forecasting for your sales team. Then define settings and set up features to get the most from Customizable Forecasting.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

[Enable Customizable Forecasting](#)

Enabling Customizable Forecasting for your sales team allows them to view and submit their customizable forecasts from the Forecasts tab based on your customizable forecast settings. Customizable Forecasting includes five standard report types. You can't create custom report types with Customizable Forecasting.

[Set Up Customizable Forecasting](#)

Access Setup to get started using Customizable Forecasting.

[Define Customizable Forecast Settings](#)

After you enable Customizable Forecasts, specify the settings that are most appropriate to how you run your business.

[Set Your Fiscal Year for Customizable Forecasting](#)

Your fiscal year determines your monthly or quarterly forecasting cycle, the month it starts, and whether the `Fiscal Year` is named for the starting or ending year. For example, if your fiscal year starts in April 2015 and ends in March 2016, your fiscal year setting can be either 2015 or 2016.

[Set Up Your Forecast Hierarchy](#)

Your forecast hierarchy lists all forecast users and determines how their forecasts roll up. Keep your forecast hierarchy up-to-date to ensure that forecast managers see all subordinates' forecast amounts.

[Enable Users for Customizable Forecasting](#)

To give users access to sales forecasts, add them to the forecast hierarchy and give them the Allow Forecasting permission.

EDITIONS

Available in: Salesforce Classic

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

[Assign Forecast Managers in Your Forecast Hierarchy](#)


After users are enabled for Customizable Forecasting, assign a user as a forecast manager for each role in your forecast hierarchy. Assigning someone as a forecast manager means that all forecasts from users below that user in the forecast hierarchy roll up to that person. For example, an executive and executive assistant can have the same role, but the executive is the assigned forecast manager in the forecast hierarchy because all subordinates' forecasts roll up to the executive. Both the executive and executive assistant can submit forecasts, but forecasts of other users do not roll up to the executive assistant.

[Submit Customizable Forecasts in Batches](#)

Submitting forecasts takes a snapshot of forecast data and makes that data available in forecast history and reports. Save time by submitting multiple forecast at the same time.

Enable Customizable Forecasting

Enabling Customizable Forecasting for your sales team allows them to view and submit their customizable forecasts from the Forecasts tab based on your customizable forecast settings. Customizable Forecasting includes five standard report types. You can't create custom report types with Customizable Forecasting.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

1. From Setup, enter *Forecasts Hierarchy* in the **Quick Find** box, then select **Forecasts Hierarchy**.
2. Click **Enable Customizable Forecasting**. If this option is not available, customizable forecasting is already enabled for your organization. After you enable customizable forecasting, three new user permissions are available:

Permission	Description
Override Forecasts	Allows users to override their own forecasts and forecasts for users below them in the forecast hierarchy. All standard profiles except Read Only receive this permission.
Edit Personal Quota	Allows users to change their individual quotas. All standard profiles except Read Only receive this permission. Users with the "Manage Users" permission can always edit any quota. Users can always edit the quotas of users that report directly to them.
View All Forecasts	Allows users to view any forecast regardless of their place in the forecast hierarchy. The System Administrator profile includes this permission.

3. Choose the appropriate opportunity page layouts that you want to include the new Opportunity Forecasts related list. Optionally, choose the **Append . . .** option to add this related list to page layouts even if users have customized them.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic


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

USER PERMISSIONS

To enable customizable forecasts:

- **Customize Application**

5. Enable or disable these permissions where necessary..

 **Note:** With customizable forecasts, your forecasts still depend on how your `Opportunity` Stage picklist values map to Forecast Categories.

SEE ALSO:


[Set Up Customizable Forecasting](#)

[Enable Territory Management](#)

[Sharing a Forecast Manually](#)

Set Up Customizable Forecasting

Access Setup to get started using Customizable Forecasting.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

Enter `Forecasts (Customizable)` in the `Quick Find` box, then selecting **Forecasts (Customizable)**:

- Click **Edit Forecast settings for your company** to customize the default settings for your organization. See [Define Customizable Forecast Settings](#).
- Click **Batch submit forecasts for your users** to set up batch submission. See [Submit Customizable Forecasts in Batches](#).
- Click **Set up the forecasting hierarchy for your company** to set up your initial forecast hierarchy. Refer to [Set Up Your Forecast Hierarchy](#).

SEE ALSO:


[Submit Customizable Forecasts in Batches](#)

[Organize Products with Product Families](#)

[Administrator tip sheet: Setting Up Customizable Forecasting](#)

Define Customizable Forecast Settings

After you enable Customizable Forecasts, specify the settings that are most appropriate to how you run your business.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

Define the following settings for your organization:

- **Forecast Data Aggregation** determines the type of data that is displayed on forecasts.
- **Forecast Summary Default View** determines the default product family, date start, date range, and forecast numbers for default forecasts.
- **Forecast Data Sharing** determines whether forecast data can be shared.

To set forecast options:

1. From Setup, enter `Forecasts` in the `Quick Find` box, then select **Forecasts Settings**.
2. Select `Forecast Revenue` if you want forecasts to include revenue amount. If you disable this setting, you lose all revenue overrides on your forecasts.

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

USER PERMISSIONS


To define forecast settings:

- [Customize Application](#)

3. Select `Forecast Quantity` if you want forecasts to include quantity totals. If you disable this setting, you lose all quantity overrides on your forecasts.
4. Choose a `Forecast Period`. If you do not have custom fiscal years enabled, choose monthly or quarterly depending on your organization's forecasting cycle. The month or quarter start date is based on Greenwich Mean Time (GMT). If you have enabled custom fiscal years, you can choose to forecast by fiscal period or by fiscal quarter. The forecast period you choose determines the time increment your organization uses for quotas and forecasts. If you choose monthly, you can still see totals by quarters but, if you choose quarterly, monthly forecast totals are not available. If you change this setting, you lose all overrides and forecasts, including all forecast history.
5. Choose a `Forecast Date` that determines how opportunity amounts contribute to forecasts:
 - If you want the entire opportunity amount to contribute to the forecast period for that date, choose `Opportunity Close Date`. If your organization does not use products, this option is the only one available.
 - If you want the amount of the product on the opportunity to contribute to the forecast period that corresponds with the `Product Date`, choose `Product Date`. When no products exist on an opportunity or the product date is blank, Salesforce uses the `Opportunity Close Date` in the user's forecast instead.
 - If you want the individual revenue schedule amounts to contribute to the forecast periods that correspond with the schedule dates, choose `Schedule Date`. If a product does not have a revenue schedule, Salesforce uses the `Product Date` in the user's forecast instead.
6. Choose a `Forecast Type`:
 - Choose `Use Overall Forecast` if your organization does not use products. Your users have one forecast and one quota for each period. If your organization does not use products, this option is the only one available.
 - Choose `Use Product Families` if your users have one quota and one forecast for each product family. See [Organize Products with Product Families](#).
7. Choose a default view for your users. This setting determines what forecast product family, date start, date range, and forecast totals to display for users when they first click the Forecasts tab. Users can change their view but the default remains the same for all users.
8. Enable or disable forecast sharing by selecting or deselecting `Enable Forecast Sharing`.
9. Click **Save**.

If you have enabled forecast sharing, you are prompted to choose who can share existing forecast views. The options are:

- `Require Administrator assistance for forecast sharing` - Only administrators can share existing forecast data.
- `Forecast managers can share their own forecast data` - Administrators can share existing forecast data, and existing forecast managers can also share their own views.

 **Note:** This choice applies to existing forecasting views only; it is not a default setting for your organization. Each time you edit or assign a forecast manager in the role hierarchy, define who can share that view.

If you have chosen to disable forecast sharing, you are prompted to confirm your choice.

Customizable Forecasting includes five standard report types. You can't create custom report types with Customizable Forecasting.

SEE ALSO:


[Set Up Customizable Forecasting](#)

[Sharing a Forecast Manually](#)

[Set Your Fiscal Year for Customizable Forecasting](#)

Set Your Fiscal Year for Customizable Forecasting

Your fiscal year determines your monthly or quarterly forecasting cycle, the month it starts, and whether the `Fiscal Year` is named for the starting or ending year. For example, if your fiscal year starts in April 2015 and ends in March 2016, your fiscal year setting can be either 2015 or 2016.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

To set your fiscal year for customizable forecasting:

1. Archive your data. We recommend running your weekly or monthly data export before setting the fiscal year, because changing the setting affects your opportunity and forecast data.
2. From Setup, enter `Fiscal Year` in the `Quick Find` box, then select **Fiscal Year**.
3. Choose a `Forecast Period` of monthly or quarterly depending on your forecasting cycle. The month or quarter start date is based on Greenwich Mean Time (GMT).
The forecast period you choose determines the time increment your company uses for quotas and forecasts. If you choose monthly, you can still see totals by quarters but, if you choose quarterly, monthly forecast totals are not available.
4. Choose a `Fiscal Year Start Month` that represents the beginning of your fiscal year.
5. Select a `Fiscal year is based on` option that represents how your company refers to a fiscal year. For example, if your fiscal year starts in April 2015 and ends in March 2016 and is called `Fiscal Year 2016`, choose `The ending month`. The last month determines how your company refers to that fiscal year.
6. If you want to change the fiscal year settings of forecasts created before you enabled customizable forecasts, select `Apply to all forecasts and quotas`. This option changes your historical forecast data.
7. Click **Save**.

SEE ALSO:

[Set Up Customizable Forecasting](#)

EDITIONS

Available in: **Salesforce Classic**

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


USER PERMISSIONS

To set fiscal year:

- **Customize Application**

Set Up Your Forecast Hierarchy

Your forecast hierarchy lists all forecast users and determines how their forecasts roll up. Keep your forecast hierarchy up-to-date to ensure that forecast managers see all subordinates' forecast amounts.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).


Your forecast is based on the role hierarchy by default, or the territory hierarchy if your org has territory management.

When customizable forecasting is enabled for your org, it automatically generates a forecast hierarchy based on your org's role hierarchy. The forecast hierarchy becomes based on your territory hierarchy only when you enable territory management. To customize your forecast hierarchy:

- Make sure that all the appropriate users are in your forecast hierarchy. If any are not and should be, see [Enable Users for Customizable Forecasting](#).
- Make sure that the appropriate users are the assigned forecast manager whenever there is more than one user in a role or territory in your forecast hierarchy. Each user at the bottom of your forecast hierarchy can be a forecast manager. However, above that, a single user must be chosen as the forecast manager for forecasts to roll up to that user. See [Assign Forecast Managers in Your Forecast Hierarchy](#).
- Share forecast manager views with other users. See [Sharing a Forecast Manually](#).

Be sure each sales manager with subordinates is designated as a forecast manager in your forecast hierarchy. This ensures that the forecast visibility rolls up to every level of the hierarchy.

If `Nonforecasting` appears next to a role or territory in the forecast hierarchy, it means that a forecast manager has not been assigned to that role or territory.

 **Note:** When you remove a user from the forecast hierarchy or the role hierarchy, all their quota and override data is permanently deleted.

SEE ALSO:

[Set Up Customizable Forecasting](#)

[Set Up Your Forecast Hierarchy](#)

[Sharing a Forecast Manually](#)

EDITIONS

Available in: Salesforce Classic

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

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


USER PERMISSIONS

To set up forecast hierarchy:

- [Customize Application](#)


Enable Users for Customizable Forecasting

To give users access to sales forecasts, add them to the forecast hierarchy and give them the Allow Forecasting permission.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

To enable users for customizable forecasting if your organization does not use territory management:


1. From Setup, enter *Forecasts Hierarchy* in the *Quick Find* box, then select **Forecasts Hierarchy**.
2. To view a list of users assigned to a level, click **Enable Users** next to a role at that level.
3. To enable the user for customizable forecasting, select a user and click **Add**. To disable a user, select the user and click **Remove**.
4. Click **Save**.

 **Note:** When you remove a user from the forecast hierarchy or the role hierarchy, all their quota and override data is permanently deleted.

To enable a user for customizable forecasting if your organization uses territory management:

1. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
2. Click **Edit** next to the user's name.
3. Select **Allow Forecasting**.
4. Click **Save**.
5. [Add the user to a territory](#).

Customizable Forecasting includes five standard report types. You can't create custom report types with Customizable Forecasting.

 **Note:** To view a list of users for a territory, select the territory name in the territory hierarchy or run a territory report. For more information on territory reports, see [Territory Reports](#).

If you add multiple users to a role or territory, assign only one as the forecast manager for that role or territory. See [Assign Forecast Managers in Your Forecast Hierarchy](#)

SEE ALSO:

- [Set Up Customizable Forecasting](#)
- [Enable Territory Management](#)
- [Sharing a Forecast Manually](#)

EDITIONS

Available in: Salesforce Classic

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

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


USER PERMISSIONS

To set up forecast hierarchy:

- [Customize Application or Manage Users](#)

Assign Forecast Managers in Your Forecast Hierarchy

After users are enabled for Customizable Forecasting, assign a user as a forecast manager for each role in your forecast hierarchy. Assigning someone as a forecast manager means that all forecasts from users below that user in the forecast hierarchy roll up to that person. For example, an executive and executive assistant can have the same role, but the executive is the assigned forecast manager in the forecast hierarchy because all subordinates' forecasts roll up to the executive. Both the executive and executive assistant can submit forecasts, but forecasts of other users do not roll up to the executive assistant.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

If a role in the forecast hierarchy has no forecast manager, that role and all its subordinate roles are not included in your forecasts.

If `Nonforecasting` appears next to a role or territory in the forecast hierarchy, it means that a forecast manager has not been assigned to that role or territory.

1. From Setup, enter `Forecasts (Customizable)` in the `Quick Find` box, then select **Forecasts Hierarchy**.
2. Click **Assign Manager** or **Edit Manager** next to a role to assign a user as the forecast manager of that role.
Roles without roles below them cannot have forecast managers unless your organization has [territory management](#), which supports forecast managers at all levels.
3. Choose a user to be assigned as the forecast manager of the selected role. If no users are available for the role, enable the appropriate user; see [Enable Users for Customizable Forecasting](#).
4. If forecast sharing is enabled, choose the sharing settings:
 - Choose `Require Administrator assistance for forecast sharing` to limit forecast sharing for this view to administrators. This is the default option.
 - Choose `Forecast managers can share their own forecast views` to allow the administrator or the forecast manager to share this view.
5. Click **Save**.

SEE ALSO:

- [Set Up Customizable Forecasting](#)
- [Set Up Your Forecast Hierarchy](#)
- [Sharing a Forecast Manually](#)

EDITIONS

Available in: **Salesforce Classic**

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


USER PERMISSIONS

To set up forecast hierarchy:

- [Customize Application](#)

Submit Customizable Forecasts in Batches

Submitting forecasts takes a snapshot of forecast data and makes that data available in forecast history and reports. Save time by submitting multiple forecast at the same time.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

To submit multiple forecasts at once:

1. From Setup, enter *Batch Submit* in the **Quick Find** box, then select **Batch Submit Forecasts**.
2. Choose the appropriate forecast period.
3. Select the users that have forecasts you want to submit and click **Add** to add them to the list of **Selected Users for Batch Submit**. Select more than one at a time using **CTRL+click**.
4. Click **Submit**.
5. Click **OK**.


Users can also submit their forecasts individually by clicking **Submit** from their forecast.

SEE ALSO:

[Set Up Customizable Forecasting](#)

Predict Sales with Customizable Forecasting

Customizable Forecasting is a flexible solution for estimating how much revenue your sales team can generate or how many items your sales team can sell. Your Salesforce admin sets up Customizable Forecasting to reflect how your sales team forecasts sales. With it, you can forecast monthly or quarterly, use different dates when applying amounts to forecasts, forecast based on revenue or quantity or both, and define additional quotas based on product families.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

[Customizable Forecasting Concepts](#)

Use Customizable Forecasting to review your forecast and drill down through your forecast amounts to see the opportunities included. Override forecast amounts directly from the opportunity, or override the forecast from the Forecasts tab without notifying users below you in the forecast role hierarchy.

[How Do I Make Sure That Customizable Forecasting Is Enabled?](#)

Determining whether Customizable Forecasting is enabled can be difficult, because the tab name doesn't change when you convert to it. Find out whether you have Customizable Forecasting, and then enable it if you need to.

[Setting Quotas for Customizable Forecasting](#)

Users with the appropriate permission can set their individual quota. Salesforce admins and users with the appropriate permission can edit any quota. And managers can change the quotas of users who report directly to them in the role hierarchy.

[Working with Forecast Categories](#)

Your forecast is a representation of your opportunity amounts, dates, and stages. Click the Forecasts tab and notice that your forecast amounts are listed in different categories.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To submit forecasts in batches:

- **Modify All Data**

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To see forecasts of other users:

- **View All Forecasts**

To override your forecast:

- **Override Forecasts**

Manage Customizable Forecasts

Your forecasts represent your opportunity amounts, dates, and stages. Make sure that your forecasts are an accurate representation of your revenue potential.

View Customizable Forecasts

When you click the Forecasts tab, review the amounts listed and determine whether they're ready to be submitted.

Override Customizable Forecasts

Make your forecast a more accurate assessment of your forecasted sales by overriding forecast amounts as needed. Any user can override a forecast from the opportunity by changing the `Stage` or `Forecast Category` of the opportunity. Users with the Override Forecasts permission can override their forecast or any direct report's forecast at the forecast level.

Override Customizable Forecasts from an Opportunity

A forecast override is an amount that more accurately represents your forecasted sales. You can view a list of overrides and make changes from the opportunity detail page.

Forecast Override Indicators

An icon appears for each override to indicate the status of the override.

Customizable Forecast Fields

Your page layout and field-level security settings determine which fields are visible and editable.

Sharing a Forecast Manually

Your Salesforce admin defines your forecasting hierarchy, which determines which users can view the forecast data. However, your admin can manually extend sharing privileges for forecast data, and you might be able to manually extend sharing privileges for your own forecast data. Manual forecast sharing only increases access to forecast data. It doesn't restrict access for users who have access. To manually share a forecast, you must be an admin or a forecast manager who has been given access to share your forecast data.

Submit Customizable Forecasts

On the Forecasts tab, your forecast totals are always available to you and users above you in your role hierarchy. However, forecast totals are available in forecast history and reports only after you submit them. You can submit your own forecast or any forecast data that has been manually shared with you and that you have permission to submit.

Customizable Forecasting Concepts

Use Customizable Forecasting to review your forecast and drill down through your forecast amounts to see the opportunities included. Override forecast amounts directly from the opportunity, or override the forecast from the Forecasts tab without notifying users below you in the forecast role hierarchy.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

Clicking the Forecasts tab displays your forecast for the selected forecast period.

- Click **Submit** to submit a forecast, making a snapshot of the forecast data available in the forecast history and forecast reports. See [Submit Customizable Forecasts](#).
- Click **Forecast History** to display the forecast data you submitted in the past. Then, click **Forecast Summary** to return to the current forecast data.
- Click **Printable View** to display the selected forecast in a simple, print-ready layout.
- Review your forecast and the forecasts of any direct reports or forecasts that are manually shared with you. See [View Customizable Forecasts](#) for instructions on different viewing options.

EDITIONS

Available in: Salesforce Classic

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


USER PERMISSIONS

To see forecasts of other users:

- View All Forecasts

To override your forecast:

- Override Forecasts

- Click the Forecast subtab to see forecast details. See [View Customizable Forecasts](#) for more information.
- Click the Opportunities subtab to see the opportunities that are included in the displayed forecast. On the Opportunities subtab, you can choose, or create, a list view to further filter the displayed opportunities. See [View Customizable Forecasts](#) for more information.
- Click the edit icon () to make changes to the adjusted forecast total, or to add an override to a particular forecast amount. For instructions on overriding forecast amounts, see [Override Customizable Forecasts](#).

If your forecast is not available, contact your administrator about adding you to the forecast hierarchy (or the territory hierarchy, if your organization uses territory management).

 **Note:** The Forecasts tab is unlike other tabs in that it automatically calculates data for you based on your opportunity data. You do not need to create or delete forecast records.

For information on implementing customizable forecasting for your organization, see [Set Up Customizable Forecasting](#).

SEE ALSO:

- [How Do I Make Sure That Customizable Forecasting Is Enabled?](#)
- [What's the difference between Collaborative Forecasts and Customizable Forecasting?](#)
- [Manage Customizable Forecasts](#)

How Do I Make Sure That Customizable Forecasting Is Enabled?

Determining whether Customizable Forecasting is enabled can be difficult, because the tab name doesn't change when you convert to it. Find out whether you have Customizable Forecasting, and then enable it if you need to.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

To determine whether Customizable Forecasting is enabled, click the **Forecasts** tab, or, from Setup, enter *Forecasts (Customizable)* in the Quick Find box.

- If you see the Request Now button on the Forecasts tab, Customizable Forecasting isn't enabled.
- If you don't get search results for *Forecasts (Customizable)* in Setup, Customizable Forecasting isn't enabled.

To enable Customizable Forecasting:

1. On the Forecasts tab, click **Request Now!**
2. From Setup, enter *Forecasts (Customizable)* in the Quick Find box, and then select **Forecasts Hierarchy**.
3. Select **Enable Customizable Forecasting**.

See [Set Up Customizable Forecasting](#).

SEE ALSO:

- [Customizable Forecasting Concepts](#)
- [What's the difference between Collaborative Forecasts and Customizable Forecasting?](#)

EDITIONS


Available in: Salesforce Classic

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

Setting Quotas for Customizable Forecasting


Users with the appropriate permission can set their individual quota. Salesforce admins and users with the appropriate permission can edit any quota. And managers can change the quotas of users who report directly to them in the role hierarchy.

1. Do one of the following:
 - To set your personal quota, access your personal information in your personal settings.
 - To change the quota of a user that reports to you, from Setup, enter *Users* in the **Quick Find** box, then select **Users**, and click the full name of the appropriate user.
2. Click **Edit** in the Quotas related list.
3. Select the appropriate range start and range length. If available, select a territory and product family.

 **Note:** If your organization uses custom fiscal years, you cannot set quotas for a period that does not have a defined fiscal year.

4. Enter the quota amounts for revenue and/or quantity.
5. Select the appropriate currency if you work with more than one currency.
6. Click **Save** to save the quota and return to the user detail page, or click **Quick Save** to save the values and continue to edit the quota.

 **Tip:** Using **Quick Save** allows you to quickly set a different quota for each product family.

 **Note:** If these options are not available to you, you may not have customizable forecasting. To determine if your organization has enabled customizable forecasting, see [How Do I Make Sure That Customizable Forecasting Is Enabled?](#) on page 460. Delegated administrators won't see the quotas related list on user records.

You can also use tools like the [Data Loader](#) to do mass updates on quotas. When updating quotas, set the quota field value on the `RevenueForecast` or `QuantityForecast` objects.

SEE ALSO:

[Customizable Forecasting Concepts](#)
[Manage Customizable Forecasts](#)

Working with Forecast Categories

Your forecast is a representation of your opportunity amounts, dates, and stages. Click the Forecasts tab and notice that your forecast amounts are listed in different categories.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

Depending on its stage, an opportunity amount can be included in the following forecast categories.

- **Best Case** includes amounts you are likely to close, closed/won opportunity amounts, and amounts in the Commit category.
- **Closed** includes amounts for closed/won opportunities.
- **Commit** includes amounts you are confident about closing and closed/won opportunity amounts.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To set your quota:

- Edit Personal Quota

To set any user's quota:


- Manage Internal Users
- AND
- Modify All Data

EDITIONS

Available in: Salesforce Classic

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

- **Omitted** means the amount does not contribute to your forecast.
- **Pipeline** includes amounts from all open opportunities.

 **Note:** You can edit the forecast category field on opportunities to change the value displayed in reports, opportunity detail and edit pages, opportunity searches, and opportunity list views. For example, you can change the value of the Commit category to Won to make the category name match your business processes.

Each value in the opportunity `Stage` picklist is automatically mapped to a `Probability` and value in the `Forecast Category` picklist. Change the `Stage` of an opportunity and the `Probability` as well as the `Forecast Category` changes with it.

For example, your organization may have mapped the “Negotiation/Review” stage to the “Best Case” forecast category. This means that the amounts of your opportunities in “Negotiation/Review” are included in your “Best Case” forecast amount. Your organization may have set up different mappings but an example of how these fields map is below:

Stage	Probability	Forecast Category
Prospecting	10%	Pipeline
Qualification	10%	Pipeline
Needs Analysis	20%	Pipeline
Value Proposition	50%	Pipeline
Id Decision Makers	60%	Pipeline
Perception Analysis	70%	Pipeline
Proposal/Price Quote	75%	Pipeline
Negotiation/Review	90%	Best Case
Closed Won	100%	Commit

Regardless of whether you use customizable forecasting or not, your forecasts still rely on how your opportunity `Stage` picklist values map to values in the `Forecast Category` picklist.


SEE ALSO:

[Customizable Forecasting Concepts](#)

[Manage Customizable Forecasts](#)

Manage Customizable Forecasts


Your forecasts represent your opportunity amounts, dates, and stages. Make sure that your forecasts are an accurate representation of your revenue potential.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

1. Review your forecast amounts. See [View Customizable Forecasts](#) for instructions on different viewing options.
2. Determine if you want to override any amounts.
3. Override amounts if necessary. This requires the appropriate user permission. See [Override Customizable Forecasts](#) on page 465.
4. Submit your forecast to make a snapshot of your forecast data available in your forecast history and forecast reports. See [Submit Customizable Forecasts](#).

View Customizable Forecasts

When you click the Forecasts tab, review the amounts listed and determine whether they're ready to be submitted.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

- Initially, your name appears in the title bar and above `Find a Forecast:`, indicating that you are viewing your own forecast. Users with the appropriate permissions can click the magnifying glass icon and select another user or role to view that person's forecast. When you are viewing a forecast other than your own, the role or username will be displayed in the title bar and above `Find a Forecast:`. In addition, your access level will be displayed above `Find a Forecast:`.

 **Note:** [User Sharing](#) does not fully support Customizable Forecasting. You'll see all users in the organization regardless of the organization-wide default for the user object.

- If your organization uses manual forecast sharing, click **Sharing** to view the forecast sharing settings or to share the forecast with other users.
- If your organization uses territories, choose an option from the `Territory` picklist to summarize the forecast by that territory. See [Territory Management Concepts](#).
- If your organization uses product families, choose an option from the `Product Family` picklist to summarize the forecast by that product family. Choosing `--All--` product families disables the **Submit**, and **Forecast History** options; choose another product family to use these options. See [Define Customizable Forecast Settings](#) for information on customizing your organization to use product families.
- If your organization forecasts on both revenue and quantity, select whether to include revenue, quantity, or revenue and quantity. This controls which information is displayed for each amount listed.
- Select a date range under `Range Start` to view another forecast period. Forecast details for opportunities that closed more than two years before you implemented Customizable Forecasting or more than 10 years in the future are not available.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To see forecasts of other users:

- View All Forecasts

To override your forecast:

- Override Forecasts

EDITIONS

Available in: Salesforce Classic

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



USER PERMISSIONS

To see forecasts of other users:

- View All Forecasts

To override your forecast:

- Override Forecasts

-  **Note:** Organizations that implemented Customizable Forecasting prior to the Salesforce Winter '07 release can see forecasts outside of this range.
- Select a `Range Length` to view fewer or more forecast periods.
-  **Note:** If you are using custom fiscal years, periods before the first defined custom fiscal year or after the last defined fiscal year use calendar months or calendar quarters (depending on your forecast setting) for the range start and period length.
- Select an option next to `Display Units` to view forecast totals using a different unit of measurement. To display what portion each total is of your quota, choose **% Quota**.

Viewing Forecast History

When viewing a forecast from the Forecasts tab, click **Forecast History** to view snapshots of your forecast data taken when you submit it. You can also view the submitted forecasts of subordinate users. Click **Forecast Summary** to return to the previous view.

Viewing Forecast Amount Details

Select the Forecasts subtab to see forecast details. Click any forecast amount to view details of the opportunity amounts included in that forecast amount. From the details page, click any item listed to view it. Click **Edit** to override that item. See [Override Customizable Forecasts](#) for instructions on overriding forecast amounts from the opportunity.


If you have direct reports (users that report directly to you), their forecasts display below yours. The `Choose a view` option allows you to change the way forecast information is displayed for your direct reports. Use this option to group forecast data by subordinate or forecast period.

- **View by Period** displays a list of direct reports and their forecasts for each forecast period. Click any name to view the forecast for that user.
- **View by Direct Report** displays a list of forecast totals for each direct report. Click **View** next to any subordinate name to view the forecast for that user.
- Clicking any amount displays the opportunities and forecast overrides included in that amount.

Viewing Opportunities

Select the Opportunities subtab to see the opportunities that are included in the displayed forecast. On the Opportunities subtab, you can choose, or create, a list view to further filter the displayed opportunities. Click any opportunity to see the opportunity details. To override the opportunity, click **Edit**. For more information on overriding opportunities, see [Override Customizable Forecasts](#).

If you have the “View All Forecasts” permission, you can see opportunities on the Opportunities subtab regardless of their sharing settings.

-  **Note:** When a [partner portal is transferred to another account](#), the opportunities on each account are automatically recalculated through your organization's forecast hierarchy.


SEE ALSO:

[Customizable Forecasting Concepts](#)

[Manage Customizable Forecasts](#)

Override Customizable Forecasts

Make your forecast a more accurate assessment of your forecasted sales by overriding forecast amounts as needed. Any user can override a forecast from the opportunity by changing the `Stage` or `Forecast Category` of the opportunity. Users with the `Override Forecasts` permission can override their forecast or any direct report's forecast at the forecast level.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).


When an opportunity moves from one forecast category to another, such as from Best Case to Commit, the unadjusted raw amounts change for each of those categories, but any amounts with overrides do not change. You should update or remove your overrides to each forecast category to account for changes in the stage of opportunities.

Overriding Your Forecast from the Opportunity


1. Click the Opportunities subtab on the Forecasts page.
2. Click **Edit** for the opportunity you want to override.
3. Make any changes to the details. The options available differ depending on whether you own the opportunity.
4. If products are on the opportunity and you want to change the forecast category for that product, select **Change Category**, then select the appropriate `Product Forecast Category`.
5. Click **Save**. The opportunity is marked with the appropriate icon indicating its override status. For a description of each override icon, see [Forecast Override Indicators](#).

Click **Save & Refresh** to update the record and redisplay the totals.

Overriding Your Forecast Total

1. Click the Forecasts subtab on the Forecasts page.
2. Click the edit icon () to override the adjusted total.
3. Enter a new amount and any comment.
4. Click **Save**. The forecast is marked with the appropriate icon indicating its override status. For a description of each override icon, see [Forecast Override Indicators](#).

Overriding the Forecast of Your Direct Reports

1. Click the Forecasts subtab on the Forecasts page.
2. Click the edit icon () to override your direct report's forecast.
3. Choose one of the override options to control which override amounts, if any, are included in the forecast:
 - **Accept John Doe's forecast**—Use this option to accept the forecast of your direct report, including any overrides that he or she has made.
 - **Reject any override on John Doe's forecast, but accept forecast overrides from other subordinates**—Use this option to ignore overrides made on your direct report's forecast, but include any overrides made on forecasts further down in the hierarchy.

EDITIONS

Available in: Salesforce Classic

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


USER PERMISSIONS

To see forecasts of other users:

- View All Forecasts

To override your forecast:

- Override Forecasts


- **Reject all forecast overrides**—Use this option to ignore all forecast-level overrides but include opportunity-level overrides. If you have overridden amounts at the opportunity, your own opportunity forecasts are used in this calculation. Choose this option if you want forecast amounts to be based on opportunity amounts including overrides made at the opportunity level.
 - **Override the forecast and set it to**—Use this option to enter an amount that replaces the current amount in your forecast. Your manager will see this amount in your forecast but your subordinates will not.
4. If you forecast on both revenue and quantity, choose an override option for quantity forecast.
 5. Click **Save**. The forecast is marked with the appropriate icon indicating its override status. For a description of each override icon, see [Forecast Override Indicators](#).
-  **Note:** The Forecasts tab is unlike other tabs in that it automatically calculates data for you based on your opportunity data. You do not need to create or delete forecast records.

SEE ALSO:

- [Customizable Forecasting Concepts](#)
- [Manage Customizable Forecasts](#)

Override Customizable Forecasts from an Opportunity

A forecast override is an amount that more accurately represents your forecasted sales. You can view a list of overrides and make changes from the opportunity detail page.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

1. From the Opportunity Forecasts related list on an opportunity record, click **Edit**.
2. Make changes to the details.

If your organization uses territory management, the territory to which the opportunity is assigned displays in the **Territory** drop-down list.


If you are a forecast manager for multiple territories, the drop-down list shows the territories from which you can override the opportunity. Choose a value and click **Edit** to override the opportunity from the desired territory.

SEE ALSO:



- [Territory Management Concepts](#)

Forecast Override Indicators

An icon appears for each override to indicate the status of the override.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

Use the following table to determine the status of an override.

Icon	Override Status
	The opportunity has been updated since an override.
	A subordinate has overridden the forecast.

EDITIONS

Available in: Salesforce Classic

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

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




USER PERMISSIONS

To view forecasts of other users:

- View All Forecasts

To override your forecast:

- Override Forecasts

Icon	Override Status
	A person that reports directly to you has overridden the forecast.
	You have overridden the forecast.
	The forecast data is not up-to-date. Refresh your browser in a few minutes.

SEE ALSO:

[Override Customizable Forecasts](#)

Customizable Forecast Fields

Your page layout and field-level security settings determine which fields are visible and editable.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

Here is a description of the fields (in alphabetical order) that make up a forecast in customizable forecasting:

Forecast Fields

Field	Description
Comments	The comments you enter when overriding your forecast.
Forecast Category	Category determined by the opportunity stage value. Options are: <ul style="list-style-type: none"> • Omitted means the amount does not contribute to your forecast. • Pipeline includes amounts from all open opportunities. • Best Case includes amounts you are likely to close, closed/won opportunity amounts, and amounts in the Commit category. • Commit includes amounts you are confident about closing and closed/won opportunity amounts. • Closed includes amounts for closed/won opportunities.
Forecast Item	Record that contributes to the forecast. This displays in the detail of a forecast amount.
Revenue	The total expected revenue amount from the opportunities that fit in a given category.

EDITIONS

Available in: Salesforce Classic

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

Field	Description
Quantity	The total number of units that are forecasted to sell as part of the opportunities in a given category.
My Forecast Override	The amount you enter when overriding a forecast amount.
Submitted By	The user who submitted a forecast.
Type	Type of override. Options are "Opportunity" or "Forecast Override."

Opportunity Forecast Fields

Opportunity Forecast Field	Description
My Forecast Amount	The amount you enter when overriding your direct report's opportunity amount.
My Forecast Category	The category selected when you override the category of an opportunity.
My Forecast Comments	The comments you enter when overriding one of your opportunities or the opportunity of a direct report.
My Forecast Period	The period you selected when overriding a direct report's opportunity period.

SEE ALSO:

[Manage Customizable Forecasts](#)

Sharing a Forecast Manually

Your Salesforce admin defines your forecasting hierarchy, which determines which users can view the forecast data. However, your admin can manually extend sharing privileges for forecast data, and you might be able to manually extend sharing privileges for your own forecast data. Manual forecast sharing only increases access to forecast data. It doesn't restrict access for users who have access. To manually share a forecast, you must be an admin or a forecast manager who has been given access to share your forecast data.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

To see which users can view your forecast or to share your forecast data, do one of the following.

- From Setup, enter *Forecasts Hierarchy* in the Quick Find box, then select **Forecasts Hierarchy**, then click **Share** next to the view you want to share.
- Click **Sharing** on the forecast home page to share your own forecast data.

The User and Group Sharing list shows you all the users who currently have access to this forecast data. It also details the level of access they have, whether they can submit a forecast, and the reason they have that access. The reasons a user might have access to forecast data are:


EDITIONS

Available in: Salesforce Classic

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

Reason	Description
Administrator	The user is an administrator, or has the “Modify All Data” permission.
Delegated Forecast Manager	A user has access to forecast data that was granted via the Sharing button on the forecast.
Forecast Manager	A user has access due to being a forecast manager in the forecast hierarchy.
Owner	The owner can always see his or her own forecast data.
View All Forecasts Permission	The user has the “View All Forecasts” permission.

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

- To show a filtered list of items, select a predefined list from the `view` drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the `view` drop-down list and click **Edit**.
- Click **Add** to grant other users or groups access to the forecast data.
 -  **Note:** Manual sharing extends to the opportunity data that makes up the forecast. If a user has permission to override forecast data, then the user also has permission to override the opportunity forecast data.
- Click **Expand List** to view all users that have access to the forecast data.
- For manual sharing rules that you created, click **Edit** or **Del** next to an item in the list to edit or delete the access level.


SEE ALSO:

[Set Up Customizable Forecasting](#)

[Define Customizable Forecast Settings](#)

Submit Customizable Forecasts

On the Forecasts tab, your forecast totals are always available to you and users above you in your role hierarchy. However, forecast totals are available in forecast history and reports only after you submit them. You can submit your own forecast or any forecast data that has been manually shared with you and that you have permission to submit.

 **Note:** This information applies to Customizable Forecasting and not [Collaborative Forecasts](#).

- Click **Submit** from your forecast on the Forecasts tab.
- Click **OK** to confirm. Salesforce takes a snapshot of your forecast totals and makes them available in reports and your forecast history.

SEE ALSO:

[View Customizable Forecasts](#)

[Manage Customizable Forecasts](#)

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To see forecasts of other users:


- View All Forecasts

To override your forecast:

- Override Forecasts

Territory Management

Territory Management makes it easy for your sales team to structure Salesforce data the same way your sales territories are structured.

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

[Set Up Territory Management](#)

Enable Territory Management for your sales team. Then define settings and set up features so that your team gets the most from Territory Management.

[Manage Sales Territories with Territory Management](#)

Learn about Territory Management, how to assign opportunities to territories, and how to see manually assigned accounts.

[Territory Management FAQ](#)

Get answers to your questions about Territory Management.


EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Set Up Territory Management

Enable Territory Management for your sales team. Then define settings and set up features so that your team gets the most from Territory Management.

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

[Enable Territory Management](#)

Before you enable Territory Management, contact Salesforce, and then check that your organization meets the prerequisites.

[Managing Territories](#)

Managing your team's sales territories involves several key tasks.

[Configure Territory Management Settings](#)

Set default account, contact, opportunity, and case access levels for new territories, and whether forecast managers can administer the territories located below them in the territory hierarchy.

[Building Your Territory Hierarchy](#)

Build a territory hierarchy and choose how it's displayed.

[Display and Edit Territories](#)

From the territory detail page, view and modify aspects of the territory, including related territories, assigned users, and included accounts.

[Create Territories](#)

Create up to 500 sales territories for your team.

[Territory Fields](#)

Your page layout and field-level security settings determine which territory fields are visible and editable.

[Delete Territories](#)

Delete territories as needed to keep your sales data up to date.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

[Create Custom Territory Fields](#)

Add up to 500 custom territory fields to tailor territories for your company's unique requirements.

[Manage Users in Territories](#)

A territory can have an unlimited number of users, and a user can be assigned to an unlimited number of territories.

[View Assigned Users Lists](#)

The assigned users list page displays a list of users assigned to the selected territory. From this page, you can view detailed user information, remove users from territories, transfer users between territories, and access other related information.

[Add Forecast Managers to Territories](#)

Assign or change the forecast manager for a territory to keep your sales data up to date.

[Managing Account Assignment Rules](#)

Create account assignment rules that automatically move accounts and their associated opportunities and cases into territories based on any standard or custom account field, such as zip code, state, industry, revenue, or number of employees. Each rule consists of multiple rows of criteria that specify exactly how the accounts are assigned.

[Create and Edit Account Assignment Rules](#)

A territory can have a maximum of 15 account assignment rules, including both active and inactive rules.

[Preview Account Assignments](#)

Before running account assignment rules, preview a list of the accounts that would be assigned to the territory and territories below it in the territory hierarchy if the rules currently marked active were run.

[View Inherited Rules Lists](#)


The inherited rules list page displays a list of account assignment rules inherited by the selected territory. From this page, you can view detailed rule information and access information on individual rules.

[Assign Accounts to Territories Manually](#)


As an alternative to creating and running account assignment rules, you can add accounts to territories manually.

Enable Territory Management

Before you enable Territory Management, contact Salesforce, and then check that your organization meets the prerequisites.

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Territory management is not enabled by default in Salesforce. To request territory management for your organization, contact Salesforce.

 **Note:** Original Territory Management is available only with Customizable Forecasts and is not supported with Collaborative Forecasts. If original Territory Management is enabled, you can no longer use Collaborative Forecasts. The newer Enterprise Territory Management can't be used with Customizable Forecasts. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

Ensure that you meet the following prerequisites before enabling territory management:

- To enable territory management, your organization must be using Customizable Forecasting. If you don't know whether Customizable Forecasting is enabled, see [How Do I Make Sure That Customizable Forecasting Is Enabled?](#) on page 460.
- To prepare your organization for territory management, follow the steps in the [Deploying Territory Management Guide](#).

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable territory management:

- Manage Territories

After you have completed the prerequisites, you will be ready to turn on territory management for your organization:

1. In Salesforce, from Setup, enter *Territory* in the **Quick Find** box, then select **Territory Settings**.
2. Optionally, change the organization-wide territory management settings that are configurable from the Territory Settings page. See [Configure Territory Management Settings](#) on page 473.
3. There are two different options for enabling territory management, which depend on your preference to retain or purge pre-existing forecast data. Click either **Enable Territory Management** or **Enable Territory Management from Scratch**.

What the Enable Territory Management Button Does

When you click this button, your organization's current forecast hierarchy and forecast data are automatically copied to the territory hierarchy as follows:

- The name of your organization is set as the top of the territory hierarchy.
- For each role in the forecast hierarchy, a corresponding territory is created in the new territory hierarchy.
- Manual forecast sharing settings on the roles are copied to the new territory. For more information on manual forecast sharing, see [Sharing a Forecast Manually](#) on page 468.
- Active Salesforce users are added to territories based on their roles.
- Opportunities are assigned to the opportunity owner's territory.
- Accounts are not assigned anywhere in the territory hierarchy.
- Until you add or edit territories, your forecasts work the same as they did before you enabled territory management.

What the Enable Territory Management from Scratch Button Does

When you click this button, the following occurs:

- All pre-existing forecast data is deleted.
- An empty territory hierarchy is created.

Using this button is only recommended when you are setting up a brand new organization in Salesforce that does not have an existing forecast hierarchy.

 **Warning: Irreversible data loss** can result from clicking **Enable Territory Management from Scratch**.

4. Configure territory-related fields, page layouts, and user permissions:
 - From the object management settings for accounts, go to Page Layouts and add the `Territories` and `Exclude from territory assignment rules` fields to account page layouts. For each account page layout, you can set whether users can choose to run account assignment rules when they save accounts. You can also set whether account assignment rules run by default whenever accounts are saved.
 - From the object management settings for opportunities, go to Page Layouts and add the `Territory` field to opportunity page layouts.
 - To allow a user to be an administrator of the territory hierarchy, grant them the "Manage Territories" permission using permission sets or profiles. Users that had the "Customize Application" permission before you enabled territory management are automatically given the "Manage Territories" permission.
5. To begin working with your new territory hierarchy, from Setup, enter *Hierarchy* in the **Quick Find** box, then select **Territory Hierarchy**. See [Building Your Territory Hierarchy](#) on page 474.

SEE ALSO:


[How Do I Make Sure That Customizable Forecasting Is Enabled?](#)

[Configure Territory Management Settings](#)

[Administrator setup guide: Deploying Territory Management](#)

Managing Territories

Managing your team's sales territories involves several key tasks.

-  **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.
- Organize territories into hierarchies that represent your organization's forecasting requirements and how users work in your organization.
- Configure organization-wide settings for territory management.
- Create new territories and edit existing territories.
- Assign users to territories.
- Define account assignment rules that evaluate accounts and assign them to territories.
- Select accounts from lists and manually assign them to territories.

SEE ALSO:


[Territory Management Concepts](#)

[Enable Territory Management](#)


[Territory Management FAQ](#)

Configure Territory Management Settings

Set default account, contact, opportunity, and case access levels for new territories, and whether forecast managers can administer the territories located below them in the territory hierarchy.

-  **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

1. From Setup, enter *Territory* in the *Quick Find* box, then select **Territory Settings**.
2. Choose default access levels for accounts, contacts (depending on your organization-wide default setting), opportunities, and cases. These are the access levels that will be selected by default when a new territory is created. For descriptions of these fields, see [Territory Fields](#) on page 477.

-  **Note:** These settings are not retroactive and do not affect territories that already exist. When creating or editing an individual territory, you can override these default access levels. See [Create Territories](#) on page 476.

3. Optionally, check `Forecast managers can manage territories`. When this box is checked, forecast managers can administer subordinate territories: they can manage users, manually add accounts, and manage account assignment rules for territories that are below their immediate territory. Also, they can add child territories to both

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To manage territories:

- Manage Territories

OR

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

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To configure territory settings:

- Manage Territories

their immediate territory and lower territories. To learn more about forecast managers, see [Assign Forecast Managers in Your Forecast Hierarchy](#) on page 457.

SEE ALSO:

[Enable Territory Management](#)


[Display and Edit Territories](#)


[Territory Management Concepts](#)

[Building Your Territory Hierarchy](#)

Building Your Territory Hierarchy

Build a territory hierarchy and choose how it's displayed.

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

 **Note:** If you clicked the **Enable Territory Management** button to [enable territory management](#), your existing forecast hierarchy was used as the basis of the territory hierarchy.

To work with your organization's territory hierarchy, from Setup, enter *Hierarchy* in the **Quick Find** box, then select **Territory Hierarchy**. The following terms are used when referring to territories in the hierarchy.

Parent Territory

A territory that is located immediately above another territory in the hierarchy. A territory has exactly one parent territory in the hierarchy, except for the top-level territory which does not have a parent.

Child Territory

A territory that is immediately below another territory in the hierarchy. A parent territory can have an unlimited number of child territories.

Sibling Territory

Child territories that share the same parent territory.

Choose an option from the drop-down list to change how the territory hierarchy is displayed:

Show in tree view

See a visual representation of the parent-child relationships between your territories. Click **Expand All** to see all territories, or **Collapse All** to see only top-level territories. To expand or collapse an individual node, click the plus (+) or minus (-) icon.

Show in sorted list view

See a territory list that you can sort alphabetically by territory name, parent territory (**Reports to**), or description.

To show a filtered list of items, select a predefined list from the **View** drop-down list, or click **Create New View** to define your own custom views. To edit or delete any view you created, select it from the **View** drop-down list and click **Edit**.

Show in list view

See a list of territories and their children, grouped alphabetically by the name of the top-level territory. The columns are not sortable. This view is not available for hierarchies with more than 1,000 territories.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To view territories:

- View Setup and Configuration

To edit territories:

- Manage Territories

OR

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

Each view provides links for you to create, edit, and delete territories.


SEE ALSO:

[Managing Territories](#)

[Display and Edit Territories](#)

Display and Edit Territories

From the territory detail page, view and modify aspects of the territory, including related territories, assigned users, and included accounts.

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Displaying Territories

1. From Setup, enter *Hierarchy* in the **Quick Find** box, then select **Territory Hierarchy**.
2. Select the name of the territory you want to view.

Viewing Related Territories

The *Hierarchy* list at the top of the territory detail page shows how this territory is related to the top-level territory in the territory hierarchy. To see the names of other territories that share parent territory of this one, refer to the *Siblings* list. In either list, you can click a territory name to view that territory. The territory detail page also includes a Child Territories related list; see [Working with Territory Related Lists](#) on page 476.

Editing Territories

To update an existing territory, click **Edit**, and then change the fields you want to modify. For more information, see [Territory Fields](#) on page 477 and [Create Custom Territory Fields](#) on page 479.

If an edit to a territory affects a large amount of data, you receive a confirmation email when the operation has completed.

 **Note:** When you edit groups, roles, and territories, sharing rules are recalculated to add or remove access as needed.

Cloning Territories

Click **Clone** to create a territory with the same standard and custom field values as the current territory. The cloned territory has the same parent territory as the original territory. However, assigned users, account assignment rules, and manually assigned accounts are not cloned.

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

Viewing Accounts Assigned to a Territory

Click **View Accounts** to see a list of the accounts that have been assigned to this territory and territories below it in the territory hierarchy. The list includes both manually assigned accounts and accounts that were assigned via rules.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To view territories:

- View Setup and Configuration


To edit territories:

- Manage Territories
- OR

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

Working with Territory Related Lists

Each territory detail page has the following related lists:


- **Assigned Users** - Lists the users in the territory. See [Manage Users in Territories](#) on page 479.
 - **Inherited Account Assignment Rules** - Lists the account assignment rules for this territory that are defined in a parent territory. See [Managing Account Assignment Rules](#) on page 483.
 - **Account Assignment Rules Defined in This Territory** - Lists the account assignment rules for this territory. See [Managing Account Assignment Rules](#) on page 483.
 - **Manually Assigned Accounts** - Lists the accounts that have been manually added to this territory. See [Assign Accounts to Territories Manually](#) on page 490.
 - **Child Territories** - Lists the territories located immediately below this territory in the territory hierarchy. To create a child territory for this territory, click **Add Territory**. To view a child territory's detail page, click the territory name.
-  **Note:** Hover over the links at the top of a detail page to display the corresponding related list and its records. If Chatter is enabled, hover links display below the feed. An interactive overlay allows you to quickly view and manage the related list items. Click a hover link to jump to the content of the related list. If hover links are not enabled, contact your Salesforce administrator.

SEE ALSO:

- [Building Your Territory Hierarchy](#)
- [Enable Territory Management](#)
- [Add Forecast Managers to Territories](#)
- [Create Territories](#)

Create Territories

Create up to 500 sales territories for your team.

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

1. From Setup, enter *Hierarchy* in the **Quick Find** box, then select **Territory Hierarchy**.
2. Click **Add Territory**. You can also click **Add Territory** from the Child Territories related list of a territory detail page.
3. Define the new territory by entering or changing fields. For descriptions of territory fields, see [Territory Fields](#) on page 477.

The required standard fields for territories are **Label**, **Territory Name**, and **Parent Territory**. Territories can also have custom fields. For more information, see [Create Custom Territory Fields](#) on page 479.

4. Click **Save** to finish or **Save & New** to create more territories.

SEE ALSO:

- [Territory Fields](#)
- [Create Custom Territory Fields](#)
- [Building Your Territory Hierarchy](#)

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS


To create territories:

- Manage Territories
- OR

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

Territory Fields

Your page layout and field-level security settings determine which territory fields are visible and editable.

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

A territory has the following fields, listed in alphabetical order.

Field Name	Description
Account Access	Sets how much access territory members have to the territory's accounts: view only, view and edit, or view, edit, transfer and delete.
Case Access	Sets how much access territory members have to cases on the territory's accounts, regardless of who owns the cases: no access, view only, or view and edit.
Confine Opportunity Assignment	Select this checkbox to prevent the opportunities in this territory from being moved out of this territory and its child territories when account assignment rules are run.
Contact Access	Sets the level of access territory members have to contacts on the territory's accounts, regardless of who owns the contacts. The options are no access, view only, or view and edit.
Forecast Manager	The user to whom forecasts from child and lower-level territories roll up. Only modifiable by clicking Change on the territory detail page. If enabled via the Territory Settings page, a forecast manager can administer lower territories in the hierarchy.
Label	The name used to refer to the territory in any user interface pages.
Opportunity Access	Sets how much access territory members have to opportunities on the territory's accounts, regardless of who owns the opportunities: no access, view only, or view and edit.
Parent Territory	Territory immediately above this territory in the territory hierarchy. The parent territory must be an existing territory. Use the lookup icon to select the parent territory.
Sharing Groups	Read-only and only displays on the territory detail page. For every territory, two sharing groups are created; one for the territory, and

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud


USER PERMISSIONS

To edit territories:

- Manage Territories

OR

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


Field Name	Description
	<p>another for the territory and its children. Click Territory to see the users who are in the sharing group for a territory. Click Territory and Subordinates to see the users who are in the sharing group for a territory and its children.</p> <p> Note: Users are listed as group members only when the group is used in sharing rules or manual record sharing.</p>
Territory Name	The unique name used by the API and managed packages.
Territory Description	A description of the territory.

SEE ALSO:

- [Create Custom Territory Fields](#)
- [Display and Edit Territories](#)
- [Create Territories](#)
- [Territory Management FAQ](#)

Delete Territories

Delete territories as needed to keep your sales data up to date.


 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

You can only delete territories that do not have any child territories. When a territory is deleted, the following items are no longer associated with that territory:

- All users, whether or not `Active in Territory` is checked
- All accounts, whether assigned manually or by account assignment rules
- All opportunities

To delete a territory:

1. From Setup, enter `Hierarchy` in the `Quick Find` box, then select **Territory Hierarchy**.
2. Click **Del** next to a territory in the hierarchy. Alternatively, select the name of a territory and click **Delete**.

 **Note:** Restoring an account or opportunity from the Recycle Bin restores the territory assignment, but it does not trigger the evaluation of account assignment rules. If account assignment rules changed while the record was in the Recycle Bin, the restored record may have territories that are inconsistent with the new rules.

SEE ALSO:

- [Display and Edit Territories](#)
- [Building Your Territory Hierarchy](#)

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To delete territories:

- Manage Territories

OR


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

Create Custom Territory Fields

Add up to 500 custom territory fields to tailor territories for your company's unique requirements.

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

From the object management settings for territories, go to the fields area. From this area, you can view details of standard fields, create or edit custom fields, or define field dependencies.

 **Note:** Territories don't have customizable page layouts. New custom fields are added in alphabetical order at the bottom of the territory detail page.

SEE ALSO:

[Display and Edit Territories](#)


[Create Territories](#)

[Territory Fields](#)

[Find Object Management Settings](#)

Manage Users in Territories

A territory can have an unlimited number of users, and a user can be assigned to an unlimited number of territories.

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

A territory can have an unlimited number of users, and a user can be assigned to an unlimited number of territories.

In the context of a specific territory, users have both an `Active` status and an `Active in Territory` status:

Active

An active user is able to log in to Salesforce.

Deactivated users, such as employees who are no longer with your company, are disabled from logging in to Salesforce. Deactivated users continue to own opportunities and appear in forecasts and territories. When users are deactivated, their opportunity forecast overrides, adjusted total overrides, and manager's choice overrides on subordinates' forecasts are frozen. However, the manager of a deactivated user can apply manager's choice overrides to that user's forecasts. Rollup amounts are kept current. If a deactivated user is later reactivated, the user can resume normal work as before. If "Allow Forecasting" is disabled for a user who is deactivated, the user is removed from any territories he or she is assigned to.

Users can set their active status by modifying their personal information page in their personal settings.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To create or edit custom territory fields:

- Manage Territories

OR

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

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To assign users to territories:

- Manage Territories

AND

Manage Users

Active in Territory

Users with `Active in Territory` checked on the territory detail page have open opportunities, closed opportunities, or no opportunities at all in that territory. Users with `Active in Territory` deselected have been transferred out of or removed from the territory, but retain ownership of opportunities in the old territory.

To view the territories to which you belong, view the Territories related list on your personal information page. To view this related list for any user, from Setup, enter `Users` in the `Quick Find` box, then select **Users**.

Adding Users to Territories

To add users to a territory:

1. From a territory detail page, click **Add Users**.
2. To show a filtered list of items, select a predefined list from the `view` drop-down list, or click **Create New View** to define your own custom views.
3. Select and deselect checkboxes in the Action column to move users between the Available and Selected areas. Also, you can:
 - Click a letter to view users who correspond to that letter.
 - Click **All** to display all users who match the criteria of the current view.
 - Click **select shown** to move all users that are shown on the current list page to the Selected area below.
 - Click **deselect shown** or **deselect all** to move users from the Selected area to the Available area.




Note: Users already assigned to the territory will not appear in the Available users list even if they meet the list view criteria.

4. When the Selected area includes all users that you want to assign to the territory, click **Assign**.

Removing Users from Territories

You can remove a user from a territory and choose who will receive his or her open opportunities:

1. In the Assigned Users related list on the territory detail page, click **Remove** next to the user's name.
2. Click the `New Owner` lookup icon () to select a recipient for any open opportunities the user may have.
3. Alternatively, leave the `New Owner` field blank. One of the following results will occur:
 - If the parent territory has a forecast manager, then that forecast manager takes ownership of the user's open opportunities. Also, the forecast manager is assigned to the territory with `Active in Territory` unchecked.
 - If the parent territory does not have a forecast manager, then the user remains in the territory with `Active in Territory` unchecked.
4. Click **Save**.


If very large amounts of data are affected, you will be sent a confirmation email when the operation has completed.

Transferring Users Between Territories

The user transfer wizard allows you to move a user from one territory to another, choose which open opportunities the user will continue to own, and designate a recipient for open opportunities the user leaves behind.

To transfer a user to another territory:

1. In the Assigned Users related list on the territory detail page, click **Transfer** next to the user's name.

2. Click **Select** next to the territory to which you are transferring the user. If necessary, expand or collapse nodes in the territory hierarchy to display the desired destination territory.
3. Click the **New Owner** lookup icon () to select the user who will take ownership of the open opportunities that the transferred user does not keep. Click **Next** to proceed.

If you skip this step and choose not to select a recipient, the forecast manager of the parent territory of the user's former territory automatically receives the open opportunities that the user does not keep. If there is no forecast manager in the parent territory of the user's former territory, then the user being moved retains ownership of his or her opportunities.

4. Choose a list view of the user's open opportunities.
5. Click **Select** and **Deselect** to move opportunities between the Available and Selected areas. Also, you can:
 - Click a letter to view opportunities that correspond to that letter.
 - Click **All** to display all opportunities that match the criteria of the current view.
 - Click **select shown** to move all opportunities that are shown on the current list page to the Selected area below.
 - Click **deselect shown** or **deselect all** to move opportunities from the Selected area to the Available area.

6. When the Selected area shows the opportunities that you want the user to retain after the transfer, click **Transfer**.
If very large amounts of data are affected, you will be sent a confirmation email when the operation has completed.



Note: If you transfer the forecast manager out of a territory, that territory will no longer have a forecast and any opportunity overrides for that territory that were created by forecast managers above it in the territory hierarchy will be deleted. See [Override Customizable Forecasts](#) on page 465.

SEE ALSO:

[Display and Edit Territories](#)

[Add Forecast Managers to Territories](#)

View Assigned Users Lists

The assigned users list page displays a list of users assigned to the selected territory. From this page, you can view detailed user information, remove users from territories, transfer users between territories, and access other related information.

- ✔ **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.
- To show a filtered list of items, select a predefined list from the `view` drop-down list, or click **Create New View** to define your own custom views. The default `view` is your last selected user view.
- Click a username to view the user detail.
- Click **Remove** next to a username to [remove the user from the territory](#).
- Click **Transfer** next to a username to [transfer the user between territories](#).

SEE ALSO:

[Territory Management Concepts](#)
[Managing Account Assignment Rules](#)

Add Forecast Managers to Territories

Assign or change the forecast manager for a territory to keep your sales data up to date.

- ✔ **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Consider the following before assigning the forecast manager for a territory:

- A territory can have only one forecast manager. See [Assign Forecast Managers in Your Forecast Hierarchy](#) on page 457.
 - Forecasts from child and lower-level territories roll up to forecast managers.
 - If a territory has no forecast manager, there is no forecast for that territory.
 - Forecast managers can receive opportunities when users are transferred out of or removed from a territory.
 - Forecast managers can receive opportunities when account assignment rules are run.
 - On the territory settings page, you can enable forecast managers to act as delegated administrators for territories below them in the hierarchy.
1. On the territory detail page, click **Change** next to the `Forecast Manager` field.
 2. Select a name from the drop-down list to specify the territory's forecast manager.

On the right, a tree view of the territory hierarchy allows you to see the child and lower-level territories whose forecasts will roll up to the forecast manager.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To view assigned users:

- View Setup and Configuration

To remove or transfer a user:

- Manage Territories
- AND
- Manage Users

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To assign forecast managers to territories:

- Manage Users
- AND
- Manage Territories
- AND
- Customize Application


3. Click **Save** to finish.

SEE ALSO:

- [Assign Forecast Managers in Your Forecast Hierarchy](#)
- [Display and Edit Territories](#)
- [Configure Territory Management Settings](#)

Managing Account Assignment Rules

Create account assignment rules that automatically move accounts and their associated opportunities and cases into territories based on any standard or custom account field, such as zip code, state, industry, revenue, or number of employees. Each rule consists of multiple rows of criteria that specify exactly how the accounts are assigned.

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Account assignment rules are governed by the following:


- A territory can have inherited account assignment rules, meaning that the rules were created somewhere higher in the territory hierarchy and consequently also impact the given territory.
- A territory can have locally defined account assignment rules, meaning that the rule was created at the given territory.
- If a territory doesn't have any inherited or locally-defined account assignment rules, then it only contains accounts that were [manually added](#).
- If an account matches all inherited and locally-defined account assignment rules for multiple territories on the same branch of the hierarchy, then the account is assigned to the lowest matching territory.
- If an account matches a territory's inherited account assignment rules but not all of the territory's locally-defined rules, then the account isn't assigned to the territory, but is evaluated for child territories.

For example, you have three territories:

- Territory A has four rules marked "Apply to child territories", and is a parent of territory B.
 - Territory B has three rules not marked "Apply to child territories", and is a parent of territory C.
 - Territory C has two rules.

If you assign an account that matches all of territory A's and territory C's rules but only one of territory B's rules, then the account is assigned to territory C. However, if territory B's rules are marked "Apply to child territories," then the account is assigned only to territory A.

Working with Account Assignment Rules

Click **Run Rules** on the territory detail page to evaluate the active inherited, locally defined rules shown on the page against all existing accounts in your organization. The rules for all subordinate territories are also evaluated—that is, when you run rules on the top-level territory, all rules in the entire hierarchy are evaluated. When you click **Run Rules**, an icon () displays next to the button for all affected territories to indicate that rules are being processed. An email confirmation is sent when processing is complete.

 **Note:** To protect data quality, you can't modify a territory while the processing icon displays.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To manage account assignment rules:

- Manage Territories
- OR

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

Click **Manage Rules** on the territory detail page to access the Manage Account Assignment Rules page, where you can create, edit, preview, and run account assignment rules:


- Click **New** to create a new rule, or **Edit** to edit an existing rule. See [Create and Edit Account Assignment Rules](#) on page 488.
- Use the `Active` checkbox to set a locally-defined rule as active or inactive.

Active account assignment rules automatically evaluate accounts and assign them to territories when:

- An account is created using the Salesforce user interface, the Lightning Platform API version 20.0 or earlier, or a client such as Connect Offline.
 - An account is imported using an import wizard.
 - An account is created by the conversion of a lead.
 - An account is edited and saved if the `Select by default` checkbox is selected for the “Evaluate this account against territory rules on save” checkbox option under **Layout Properties**. If the account assignment rule initiates an opportunity ownership change, you must have transfer access on the opportunity.
 - An account is edited and saved via the Lightning Platform API.
 - **Run Rules** is clicked on a territory detail page, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
 - **Save & Run Rules** is clicked on the manage account assignment rules page for a territory, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
 - Duplicate accounts are merged.
- Click a rule name to see the details of that rule, including its active status and criteria. From a rule detail page you can edit, delete, or clone a rule.
 - Click **Preview** to see the accounts that would be assigned to this territory and its child territories if the rules currently marked active were run. See [Preview Account Assignments](#) on page 489.
 - Click **Save** to save the current active status of locally-defined rules.
 - Click **Save & Run Rules** to save the current active status of locally-defined rules and evaluate the inherited and locally-defined rules shown on the page against all existing accounts in your organization. Running account assignment rules affects accounts in the Recycle Bin.

Click **Edit** on the territory detail page to toggle the `Confine Opportunity Assignment` checkbox. When it is selected, the territory's opportunities remain in the territory or its child territories when you run account assignment rules. The following exceptions apply:

- If an opportunity's account moves to only one of the territory's children, then the opportunity follows the account and is reassigned to the account's new territory. This includes when an account moves to multiple territories and only one of the new territories is a child of the original territory.
- If an opportunity's account moves to more than one of the territory's children, then the opportunity's territory field is set to blank.
- If an opportunity's account moves completely out of the territory and its children, then the opportunity's territory field is set to blank.


 **Tip:** You can also manage account assignment rules using the Data Loader or the Web services API.

Account Assignment Rules and Opportunities

Several factors determine how account assignment rules assign opportunities to territories, including:

- Whether the account associated with the opportunity is assigned to one or more territories
- Whether the opportunity owner is a member of the same territory as the account
- The number of users assigned to the territory

- Whether a forecast manager is assigned to the territory

 **Note:** If you're updating an account which triggers an account assignment rule that is part of territory management, you must have transfer access on the opportunity if the account assignment rule initiates a change in the opportunity ownership.

Accounts with One Territory

If the account associated with the opportunity is assigned to only one territory, use the following table to determine how the opportunity's territory is assigned:

Opportunity Owner Belongs to Same Territory as Account	Number of Users Assigned to Territory	A Forecast Manager is Assigned to the Territory	Results
Yes	1	N/A	The opportunity is assigned to the same territory as the account. The opportunity owner is unchanged.
No	1	N/A	The opportunity is assigned to the same territory as the account and the opportunity owner is the sole member of the territory.
No	0	N/A	The opportunity is assigned to the same territory as the account and the opportunity owner is added as an inactive member of the territory. The owner of the opportunity remains unchanged.
Yes	>1	Yes	The opportunity is assigned to the same territory as the account and the forecast manager becomes the opportunity owner.
Yes	>1	No	The opportunity is assigned to the same territory as the account. The owner of the opportunity remains unchanged if the opportunity owner has <code>Active in Territory</code> selected on the territory detail page.
No	>1	Yes	The opportunity is assigned to the forecast manager of the territory.
No	>1	No	The opportunity is assigned to the same territory as the account and the opportunity owner is added as an inactive member of the territory. The owner of the opportunity remains unchanged.

Accounts with Multiple Territories

If the account associated with the opportunity is assigned to more than one territory, use the following table to determine how the opportunity's territory is assigned:

Opportunity Owner's Territory Membership	Results
Opportunity owner has one territory in common with the account	The opportunity is not assigned to any territories. The opportunity owner can assign the opportunity to the

Opportunity Owner's Territory Membership	Results
	territory that he or she has in common with the account.
Opportunity owner has more than one territory in common with the account	The opportunity is not assigned to any territories. The opportunity owner can assign the opportunity to any territory that he or she has in common with the account.
Opportunity owner has no territories in common with the account	The opportunity is not assigned to any territories. The opportunity owner cannot assign the opportunity to any territories.

Territory Assignments for Standard Users

If the user creating the opportunity is a standard user, Salesforce automatically assigns a territory to a new opportunity only if the user and account have exactly one territory in common. For example, James, who is a standard user assigned to the Westlake territory only, creates an opportunity on the Filmore, Inc. account. Filmore, Inc. belongs to the Westlake territory and one other territory. Because James and Filmore, Inc., have exactly one territory in common, the new opportunity is assigned to the Westlake territory. If James belonged to the account's other territory, the opportunity would not be assigned to a territory.

Use the following table to determine when a territory will be assigned to an opportunity created by a standard user.

Number of Territories Assigned to User	Number of Territories Assigned to Account	Opportunity Owner Belongs to Same Territory as Account	Results
1	1	Yes	The opportunity is assigned to the territory in common.
>1	1	Yes	The opportunity is assigned to the account's territory if the user belongs to that same territory.
1	>1	Yes	The opportunity is assigned to the user's territory if the account is associated with that same territory.
>1	>1	Yes	The opportunity is not assigned to any territories. The opportunity owner can assign the opportunity to any territory that he or she has in common with the account.
N/A	N/A	No	The opportunity is not assigned to any territories.

Territory Assignments for Administrators

A user who is an administrator or has "Manage Territories" permission can view all territories.

If the user is an administrator, a territory-delegated administrator, or a user with the "Manage Territories" permission, Salesforce automatically assigns a territory to a new opportunity only if the administrator, the account, and the account's parent accounts have exactly one territory in common. For example, Jennifer is an administrator who manages the Northlake and Westlake territories. She creates an opportunity on the Richmond Brothers account. Richmond Brothers is associated with the Northlake and Southlake territories. Richmond

Brothers has one parent account, Zyman Products, which is assigned to the Northlake and Eastlake territories. Because Jennifer, Richmond Brothers, and Zyman Products have only the Northlake territory in common, the new opportunity is assigned to the Northwest territory. If Richmond Brothers or Zyman Products also belonged to the Westlake territory, the opportunity would not be assigned to a territory.

Use the following table to determine when a territory will be assigned to an opportunity created by an administrator.

Number of Territories Administrator Manages	Number of Territories Assigned to Account	Number of Territories Assigned to Account's Parent Account(s)	Opportunity Owner Manages Same Territory as Account and Parent Account(s)	Results
1	1	1	Yes	The opportunity is assigned to the territory in common.
>1	1	1	Yes	The opportunity is assigned to the territory in common.
1	>1	1	Yes	The opportunity is assigned to the territory in common.
1	1	>1	Yes	The opportunity is assigned to the territory in common.
>1	>1	1	Yes	The opportunity is assigned to the parent account's territory if the administrator and the account have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account
1	>1	>1	Yes	The opportunity is assigned to the administrator's territory if the account and the account's parent account(s) have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account
>1	1	>1	Yes	The opportunity is assigned to the account's territory if the administrator and the account's parent account(s) have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account
>1	>1	>1	Yes	The opportunity is assigned to the administrator's territory if the administrator, the account, and the account's parent account(s) have no other territories in common. The opportunity owner can manually assign the opportunity to any territory that he or she has in common with the account.

Number of Territories Administrator Manages	Number of Territories Assigned to Account	Number of Territories Assigned to Account's Parent Account(s)	Opportunity Owner Manages Same Territory as Account and Parent Account(s)	Results
N/A	N/A	N/A	No	The opportunity is not assigned to any territories.

SEE ALSO:

[Create and Edit Account Assignment Rules](#)


[Preview Account Assignments](#)

[Display and Edit Territories](#)

[Assigning Opportunities to Territories](#)

Create and Edit Account Assignment Rules

A territory can have a maximum of 15 account assignment rules, including both active and inactive rules.

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

1. From Setup, enter *Hierarchy* in the **Quick Find** box, then select **Territory Hierarchy**.
2. Select the territory you want to modify.
3. Click **Manage Rules** in the Account Assignment Rules related list.
4. Click **New** to create a new account assignment rule. To edit an existing account assignment rule, click **Edit**.
5. Enter a name for the rule. Rule names must be unique and can have a maximum of 80 characters.
6. Define filter criteria that accounts must match to be included in the territory.

If your organization uses multiple languages, use your organization's default language when specifying your criteria. When you use picklists to specify filter criteria, the selected values are stored in the organization's default language. If you edit or clone existing filter criteria, first set the **Default Language** on the Company Information page to the same language that was used to set the original filter criteria. Otherwise, the filter criteria may not be evaluated as expected.

7. Optionally, check the **Apply to child territories** box that makes the rule applicable to child territories
8. Optionally, check the **Active** box to activate the rule. Inactive rules never run.

Active account assignment rules automatically evaluate accounts and assign them to territories when:

- An account is created using the Salesforce user interface, the Lightning Platform API version 20.0 or earlier, or a client such as Connect Offline.
- An account is imported using an import wizard.
- An account is created by the conversion of a lead.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To create or edit account assignment rules:

- **Manage Territories**
- OR

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

- An account is edited and saved if the `Select by default` checkbox is selected for the “Evaluate this account against territory rules on save” checkbox option under **Layout Properties**. If the account assignment rule initiates an opportunity ownership change, you must have transfer access on the opportunity.
- An account is edited and saved via the Lightning Platform API.
- **Run Rules** is clicked on a territory detail page, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
- **Save & Run Rules** is clicked on the manage account assignment rules page for a territory, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
- Duplicate accounts are merged.

9. Click **Save** to finish, or **Save & New** to save the rule and begin defining another rule.



Tip: By creating at least one account assignment rule at the top of your territory hierarchy that applies to child territories, you can build a hierarchy where all accounts match the top-level criteria and subordinate territories differentiate accounts by more specific criteria.

Similarly, if your organization uses divisions, create a rule at the top of your territory hierarchy that filters accounts by division and applies to child territories.

SEE ALSO:

[Managing Account Assignment Rules](#)

[Preview Account Assignments](#)

[Display and Edit Territories](#)

Preview Account Assignments

Before running account assignment rules, preview a list of the accounts that would be assigned to the territory and territories below it in the territory hierarchy if the rules currently marked active were run.



Note: This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

1. From the territory detail page, click **Manage Rules > Preview**.
2. Click **Save** to save the active status of the rules. Click **Save & Run Rules** to save the active status of the rules and evaluate the rules against all existing accounts in your organization.



Note: Running account assignment rules affects accounts in the Recycle Bin.

SEE ALSO:

[Managing Account Assignment Rules](#)

[Create and Edit Account Assignment Rules](#)

[Display and Edit Territories](#)

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To preview account assignments in territories:


- Manage Territories

OR

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

View Inherited Rules Lists

The inherited rules list page displays a list of account assignment rules inherited by the selected territory. From this page, you can view detailed rule information and access information on individual rules.



-  **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.
- To show a filtered list of items, select a predefined list from the **View** drop-down list, or click **Create New View** to define your own custom views.
- Click a rule name to view the rule detail.

SEE ALSO:

- [Territory Management Concepts](#)
- [Assign Accounts to Territories Manually](#)

Assign Accounts to Territories Manually

As an alternative to creating and running account assignment rules, you can add accounts to territories manually.

-  **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.
1. On the territory detail page, click **Add Accounts** on the Manually Assigned Accounts related list.
 2. Choose a view from the drop-down list, or click **Create New View** to build a new custom view.
 3. Click **Select** and **Deselect** to move accounts between the Available and Selected areas. Also, you can:
 - Click a letter to view accounts that correspond to that letter.
 - Click **All** to display all accounts that match the criteria of the current view.
 - Click **select shown** to move all accounts that are shown on the current list page to the Selected area below.
 - Click **deselect shown** or **deselect all** to move accounts from the Selected area to the Available area.
 4. When the accounts in the Selected area includes all accounts that you want to manually add to the territory, click **Assign**.
-  **Note:** Manually adding accounts and running account assignment rules are completely independent. A manually added account remains in a territory until it is manually removed. There is nothing to prevent assignment rules also adding the account to the territory.

SEE ALSO:

- [Display and Edit Territories](#)

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To view inherited rules:

- View Setup and Configuration

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To manually add accounts to territories:

- Manage Territories

AND

Edit on accounts

OR

You are a forecast manager, Forecast managers can manage territories is selected, you are working below your position in the territory hierarchy, and you have Edit on accounts.

Manage Sales Territories with Territory Management

Learn about Territory Management, how to assign opportunities to territories, and how to see manually assigned accounts.

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Territory Management Concepts

Territory management is an account sharing system that grants access to accounts based on the characteristics of the accounts. It enables your company to structure your Salesforce data and users the same way you structure your sales territories.

Assigning Opportunities to Territories

An opportunity can be assigned to a territory when the opportunity is created—either manually or during lead conversion—or when account assignment rules run that affect existing opportunities.

View Manually Assigned Accounts Lists

The manually assigned accounts list page displays a list of accounts assigned to the selected territory. From this page, you can view detailed account information, remove accounts from territories, and access other related information.


EDITIONS

Available in: Salesforce Classic


Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Territory Management Concepts

Territory management is an account sharing system that grants access to accounts based on the characteristics of the accounts. It enables your company to structure your Salesforce data and users the same way you structure your sales territories.

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management. Original Territory Management is available only with Customizable Forecasts and is not supported with Collaborative Forecasts. If original Territory Management is enabled, you can no longer use Collaborative Forecasts. The newer Enterprise Territory Management can't be used with Customizable Forecasts. Enterprise Territory Management and Collaborative Forecasts can both be enabled and used at the same time in your Salesforce organization, but the two features are not currently integrated to work together.

Particularly if your organization has a private sharing model, you may need to grant users access to accounts based on criteria such as postal code, industry, revenue, or a custom field that is relevant to your business. You may also need to generate forecasts for these diverse categories of accounts. Territory management solves these business needs and provides a powerful solution for structuring your users, accounts, and their associated contacts, opportunities, and cases.

 **Note:** Account ownership and its effect on record sharing remains valid and unchanged when territory management is in use.


Key benefits of territory management include:

- The ability to use account criteria to expand a private sharing model.
- Support for complex and frequently changed sales organization structures.
- Support for transferring users between territories, with the option to retain opportunities.
- Multiple forecasts per user, based on territory membership.
- Territory-based sales reports.

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

 **Note:** Territory management only affects accounts and the standard objects that have a master-detail relationship to accounts. For example, opportunities are included in territory management but leads are not.

What Is a Territory?

A territory is a flexible collection of accounts and users where the users have at least read access to the accounts, regardless of who owns the account. By configuring territory settings, users in a territory can be granted read, read/write, or owner-like access (that is, the ability to view, edit, transfer, and delete records) to the accounts in that territory. Both accounts and users can exist in multiple territories. You can manually add accounts to territories, or you can define account assignment rules that assign accounts to territories for you.

You can also control users' access to the opportunities and cases associated with the accounts in the territory, regardless of who owns the records.

What Is a Territory Hierarchy?

Territories exist in a hierarchy which you can set up with as many nested levels as you wish. For example, you could create a top-level territory named "Worldwide Sales" that has the child territories "North America," "Europe/Middle East," "Latin America," "Africa," and "Asia/Australia." "North America" might have the child territories "Canada" and "United States." "United States" might have the child territories "Western," "Central," "Southern," and "Eastern." Finally, "Western" might have the child territories "California," "Oregon," "Washington," "Nevada," "Arizona," and "Utah."

Territory hierarchies do not have to be focused on geography; they can be defined however you like.

How Do Territories Affect Forecasting?

When you enable territory management for your organization, the territory hierarchy also becomes the forecast hierarchy. Your forecast data is derived from the opportunities that are associated with the accounts in your territories. Users have a different forecast for each territory to which they are assigned. For example, if you are assigned to both "California" and "Arizona," you have a separate forecast for the opportunities you have in each of these territories."

SEE ALSO:


[Managing Territories](#)

[Building Your Territory Hierarchy](#)

[Territory Management FAQ](#)

Assigning Opportunities to Territories

An opportunity can be assigned to a territory when the opportunity is created—either manually or during lead conversion—or when account assignment rules run that affect existing opportunities.

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

- [Territory Assignment for Manually Created Opportunities](#)
- [Territory Assignment for Converted Leads](#)
- [Notes About Territory Assignment for Opportunities](#)

Territory Assignment for Manually Created Opportunities

When an opportunity is created from the Opportunities tab or from the Quick Create area on the sidebar, Salesforce compares the territories associated with the opportunity's account to the territories that the opportunity owner is a member of:

- If there is a single territory that both the account and the opportunity owner belong to, the opportunity is assigned to that territory if “Evaluate this account against territory rules on save” is selected.
- If more than one territory is common to both the account and the opportunity owner, the opportunity is not automatically assigned to any territory. The opportunity owner must manually assign a territory to the opportunity.
- If no territory is common to both the account and the opportunity owner, the opportunity owner cannot assign the opportunity to a territory.

Territory Assignment for Converted Leads

When a lead is converted to an opportunity, that opportunity's territory assignment depends on several factors, including:

- Whether the account associated with the opportunity is assigned to one or more territories
- Whether the lead owner is a member of the same territory as the account
- The number of users assigned to a territory
- Whether a forecast manager is assigned to the territory

If the account associated with the opportunity is assigned to only one territory, use the following table to determine how the opportunity's territory is assigned:

Lead Owner Belongs to Same Territory as Account	Number of Users Assigned to Territory	A Forecast Manager is Assigned to the Territory	Results
Yes	1	N/A	The opportunity is assigned to the same territory as the account and the lead owner becomes the opportunity owner.
No	1	N/A	The opportunity is assigned to the same territory as the account and the opportunity owner is the sole member of the territory.
No	0	N/A	The opportunity is assigned to the same territory as the account and the lead owner becomes the

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To create opportunities:

- Create on Opportunities

Lead Owner Belongs to Same Territory as Account	Number of Users Assigned to Territory	A Forecast Manager is Assigned to the Territory	Results
			opportunity owner. The lead owner is added as an inactive member of the territory.
Yes	>1	Yes	The opportunity is assigned to the same territory as the account and the forecast manager becomes the opportunity owner.
Yes	>1	No	The opportunity is assigned to the same territory as the account and the lead owner becomes the opportunity owner.
No	>1	Yes	The opportunity is assigned to the forecast manager of the territory.
No	>1	No	The opportunity is assigned to the same territory as the account and the lead owner becomes the opportunity owner. The lead owner is added as an inactive member of the territory.

If the account associated with the opportunity is assigned to more than one territory, use the following table to determine how the opportunity's territory is assigned:

Lead Owner's Territory Membership	Results
Lead owner has one territory in common with the account	The opportunity is not assigned to any territories and the lead owner becomes the opportunity owner. The opportunity owner can assign the opportunity to the account's territory.
Lead owner has more than one territory in common with the account	The opportunity is not assigned to any territories and the lead owner becomes the opportunity owner. The opportunity owner can assign the opportunity to any territory that he or she has in common with the account.
Lead owner has no territories in common with the account	The opportunity is not assigned to any territories and the lead owner becomes the opportunity owner. The opportunity owner cannot assign the opportunity to any territories.

Notes About Territory Assignment for Opportunities

- The following actions do not change an opportunity's territory:
 - Manually assigning the opportunity's account to a territory
 - Changing which account is associated with the opportunity

- Changing the account's territory as a result of account assignment rules if the opportunity and its account are in different territories
- Transferring the opportunity to a new owner
- Territory assignment rules do not update an opportunity if the opportunity's `Close Date` is before the current date and the opportunity's `Stage` is `Closed Won` or `Closed Lost`.
- When an opportunity is not automatically assigned to a territory, we recommend that users be notified if the opportunity is not assigned to a territory manually within one day. You can set up time-based workflow to notify users about unassigned opportunities.
- Restoring an account or opportunity from the Recycle Bin restores the territory assignment, but it does not trigger the evaluation of account assignment rules. If account assignment rules changed while the record was in the Recycle Bin, the restored record may have territories that are inconsistent with the new rules.
- When opportunities are transferred from one user to another, whether individually or as a group, the territory assignment on the opportunities is unaffected. However, if the opportunities are assigned to a user who is not already a member of the opportunity's territory, that user is added as an inactive member of the territory.
- When users are removed from a territory, you can specify who should receive their open opportunities. Also, when users are transferred from one territory to another, you can specify which opportunities the users should continue to own and select a recipient for any remaining opportunities. If you do not specify a recipient:
 - If the parent territory has a forecast manager, the forecast manager takes ownership of the user's open opportunities. The forecast manager is assigned to the territory and `Active in Territory` is unchecked.
 - If the parent territory does not have a forecast manager, the user remains in the territory and `Active in Territory` is unchecked.


SEE ALSO:

[Managing Account Assignment Rules](#)

[Create and Edit Account Assignment Rules](#)

View Manually Assigned Accounts Lists

The manually assigned accounts list page displays a list of accounts assigned to the selected territory. From this page, you can view detailed account information, remove accounts from territories, and access other related information.

-  **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.
- To show a filtered list of items, select a predefined list from the `view` drop-down list, or click **Create New View** to define your own custom views.
- Click an account name to view the account detail.
- Click **Remove** next to an account name to remove the account from the territory.


SEE ALSO:

[Territory Management Concepts](#)

[Manage Users in Territories](#)

Territory Management FAQ

Get answers to your questions about Territory Management.

-  **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

[How does Salesforce handle territory management?](#)

[Are opportunities transferred to different users when account assignment rules are run?](#)

[Are the territory hierarchy and the role hierarchy different?](#)

[How are opportunities assigned to territories?](#)

[How do manually assigned accounts differ from those assigned by account assignment rules?](#)

[How does opportunity confinement work?](#)

EDITIONS

Available in: Salesforce Classic

Available in: **Developer** and **Performance** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To view manually assigned account lists:

- View Setup and Configuration

To remove accounts:

- Manage Territories

AND

Edit on accounts

OR

You are a forecast manager, Forecast managers can manage territories is selected, you are working below your position in the territory hierarchy, and you have Edit on accounts.

EDITIONS

Available in: Salesforce Classic

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

[Must I be assigned to the same territories as the opportunities I own?](#)

[What happens when I undelete an account or opportunity that was assigned to a territory?](#)


[What kinds of records have territories?](#)

[When do account assignment rules evaluate accounts?](#)

SEE ALSO:

[Territory Management Concepts](#)

How does Salesforce handle territory management?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.


In Developer and Performance Edition orgs, and in Enterprise and Unlimited Edition orgs with the Sales Cloud, you can enable Territory Management to organize your users into territories and provide access to accounts and their related opportunities and cases.

In Professional Edition orgs, Salesforce's role hierarchy allows you to manage the roll-up of information among your company's territories. The hierarchy structure is not based on traditional titles, but rather on a hierarchy of roles. Multiple people with different titles can be assigned to the same role. Users always have access to the data that is owned by or shared with users assigned to roles below them in the hierarchy. A user's role also determines which data is accessible to him or her in forecasts.

A typical org may have three levels of roles, for example:



- The top role may include your VPs of sales, marketing, and client services, and your CFO. These users will be able to view all information at lower levels and perform roll-ups on that information.
- The middle level may include various vice president or regional managers. These roles can access the data owned by or shared with all users below them in the hierarchy. For example, the Western VP role can view and perform roll-ups of the information owned by users in the Western Reps role.
- Since no roles are below the various Reps roles, the users in those roles cannot perform any roll-ups or view anyone's information except their own.

 **Note:** Your role hierarchy interacts with your org's sharing model to determine exactly what information a user can see, given the sharing setting is selected to use hierarchies. For forecasts, a user's role always determines which information he or she can view, regardless of the sharing model. Likewise, in a Private sharing model, a user's role determines his or her access to other users' data. However, in a Public Read/Write or Public Read Only org, users can view (and edit, for Public Read/Write) information of all other users, in addition to having access to the data of users below them in the hierarchy.

SEE ALSO:

[Territory Management FAQ](#)

[Territory Management Concepts](#)

EDITIONS

Territory Management
available in: Salesforce
Classic

Are opportunities transferred to different users when account assignment rules are run?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

When account assignment rules cause an opportunity to be reassigned to a territory to which you already belong, you automatically become the owner of that opportunity when you meet any of the following criteria:


- You are the only member of the territory.
- You are the only forecast manager in the territory.
- You are the only territory member enabled for forecasting.

If none of these criteria are met, the original opportunity owner is added to the territory as an inactive member.

SEE ALSO:

[Territory Management FAQ](#)

Are the territory hierarchy and the role hierarchy different?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Yes. The territory hierarchy and the role hierarchy are independent. See the following comparison:

Territory Hierarchy	Role Hierarchy
Is available by contacting Salesforce	Is available by default
Determines forecasts	Has no impact on forecasting when territory management is enabled
Supports assigning a user to multiple territories	Supports assigning a user to only one role
Affects account and opportunity reports	Affects all other reports
Grants access to records regardless of ownership. Users receive whatever access is most permissive across both hierarchies.	Grants access to records based on ownership. Users receive whatever access is most permissive across both hierarchies.

SEE ALSO:

[Territory Management FAQ](#)

How are opportunities assigned to territories?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Opportunities are automatically assigned to territories based on the following actions.


- Creating a new opportunity
- Running account assignment rules

When account assignment rules are run, opportunities are automatically assigned to the same territory as the account when:

- An opportunity does not have a territory and its account is added to a territory.
- An account moves from one territory to another. However, if an account assignment rule prohibits opportunities from moving outside a given part of the territory hierarchy, the opportunities do not move and no longer belong to any territories.

Opportunities are not automatically assigned to the same territory as the account when:

- An account is removed from a territory and not reassigned to a new territory in the same operation. The account's opportunities from the original territory no longer belong to any territories.
- An account is reassigned to multiple territories in one operation. The account's opportunities from the original territory no longer belong to any territories, unless the `Confine Opportunity Assignment` checkbox is checked.

 **Note:** If the opportunity owner is not part of the new territory, he or she is added as an inactive member of the territory.


The following actions do not change an opportunity's territory.

- Manually assigning the opportunity's account to a territory
- Changing which account is associated with the opportunity
- Changing the account's territory as a result of account assignment rules if the opportunity and its account are in different territories
- Transferring the opportunity to a new owner.

SEE ALSO:

[Territory Management FAQ](#)

How do manually assigned accounts differ from those assigned by account assignment rules?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Manually assigned accounts are not evaluated when running account assignment rules. After they have been manually assigned to a territory, they remain there until they are manually removed from the territory.

SEE ALSO:

[Territory Management FAQ](#)

How does opportunity confinement work?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.


If the `Confine Opportunity Assignment` checkbox is selected for a territory, the territory's opportunities remain in the territory or its child territories when you run account assignment rules. The following exceptions apply:

- If an opportunity's account moves to only one of the territory's children, then the opportunity follows the account and is reassigned to the account's new territory. This includes when an account moves to multiple territories and only one of the new territories is a child of the original territory.
- If an opportunity's account moves to more than one of the territory's children, then the opportunity's territory field is set to blank.
- If an opportunity's account moves completely out of the territory and its children, then the opportunity's territory field is set to blank.

SEE ALSO:

[Territory Management FAQ](#)

Must I be assigned to the same territories as the opportunities I own?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

When an open opportunity is assigned to you and you do not belong to that opportunity's territory, you are assigned to the territory with `Active in Territory` unchecked in the Assigned Users related list of the territory.

SEE ALSO:

[Territory Management FAQ](#)

What happens when I undelete an account or opportunity that was assigned to a territory?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Undeleting an account or opportunity restores the territory assignment, but does not trigger the evaluation of account assignment rules. If account assignment rules changed while the record was in the Recycle Bin, the restored record may have territories that are not consistent with the new rules.

SEE ALSO:

[Territory Management FAQ](#)

What kinds of records have territories?


 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Accounts, opportunities, and users have territory fields. Accounts and users can be associated with multiple territories. An opportunity can be associated with only one territory.

SEE ALSO:

[Territory Management FAQ](#)

When do account assignment rules evaluate accounts?

 **Note:** This information applies to the original Territory Management feature only, and not to Enterprise Territory Management.

Active account assignment rules automatically evaluate accounts and assign them to territories when:


- An account is created using the Salesforce user interface, the Lightning Platform API version 20.0 or earlier, or a client such as Connect Offline.
- An account is imported using an import wizard.
- An account is created by the conversion of a lead.
- An account is edited and saved if the `Select by default` checkbox is selected for the “Evaluate this account against territory rules on save” checkbox option under **Layout Properties**. If the account assignment rule initiates an opportunity ownership change, you must have transfer access on the opportunity.
- An account is edited and saved via the Lightning Platform API.
- **Run Rules** is clicked on a territory detail page, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.
- **Save & Run Rules** is clicked on the manage account assignment rules page for a territory, provided the `Exclude from territory assignment rules` checkbox on the account is deselected.

- Duplicate accounts are merged.

SEE ALSO:

[Territory Management FAQ](#)

Salesforce for Wealth Management

 **Note:** This information applies to Wealth Management, not to [Financial Services Cloud](#).

Salesforce for Wealth Management is intended for wealth management professionals who advise high net worth clients. It allows you to build deeper customer relationships, integrate key systems to drive user adoption, and effectively support compliance processes.

Salesforce for Wealth Management contains the following components that set it apart from standard Salesforce functionality:

- Easy-to-use tabs with client-oriented fields
- Comprehensive client information including financial accounts, investment preferences, addresses, and personal interests
- Comprehensive “Know Your Client” suitability forms with an automated approval process
- Reports and dashboards specific to the wealth management process
- Relationship groups (also known as households)

Salesforce for Wealth Management is available for free on AppExchange for Enterprise, Unlimited, and Performance Editions. It includes all generally available Enterprise, Unlimited, and Performance Edition features such as Outlook integration, workflow, and the Lightning Platform API. As a prerequisite, it requires [person accounts](#), which are enhanced account records designed for business-to-consumer industries such as financial services.

[Set Up Salesforce for Wealth Management](#)

[Manage the Know Your Client Approval Process](#)

[Navigate the Salesforce for Wealth Management App](#)

To access the Salesforce for Wealth Management app, go to the Lightning Platform app menu in the top right corner of any Salesforce page and select Salesforce for Wealth Management. To get started on any task, just click the tab you want.

[Managing Wealth Management Clients](#)

[Salesforce for Wealth Management Reports and Dashboards](#)

[Wealth Management Relationship Groups](#)

SEE ALSO:

[Set Up Salesforce for Wealth Management](#)

[Navigate the Salesforce for Wealth Management App](#)

Set Up Salesforce for Wealth Management

 **Note:** This information applies to Wealth Management, not to [Financial Services Cloud](#).

As an administrator, perform the following tasks to set up Salesforce for Wealth Management for your organization:

Verify the Contents of the Salesforce for Wealth Management App

Verify that the Salesforce for Wealth Management custom app contains the correct tabs:

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. In the list, click *Salesforce for Wealth Management*.
3. Verify that the following tabs are present in the Included Tabs list:
 - Home
 - Accounts
 - Financial Accounts
 - Holdings
 - WM Assets
 - Client Interests
 - Know Your Clients
 - Reports
 - Dashboards
 - Documents
 - Console
4. If necessary, click **Edit** and choose the appropriate tabs to add or remove.

Configure Users' App Choices

In addition to the main Salesforce for Wealth Management custom app, the following custom apps are also available in the Lightning Platform app menu:

- Salesforce Financial Accounts & Holdings
- Salesforce Clients and Interests
- Salesforce Know Your Client

Optionally, you can hide these apps from users in the Lightning Platform app menu, because all appropriate tabs are already consolidated in the main Salesforce for Wealth Management custom app. To hide these apps:

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Click **Edit** next to the appropriate app name.
3. In the *Assign to Profiles* area, deselect the checkboxes in the *Visible* column that correspond to end users' profiles. Select only the checkboxes that correspond to administrator profiles.
4. Click **Save**.
5. Repeat this procedure as necessary for the remaining custom apps listed above.

USER PERMISSIONS

To view the setup options for custom apps:

- View Setup and Configuration

To manage custom apps:

- Customize Application

Verify Record Types

From the object management settings for person accounts, go to Record Types to verify that the following record types are available for person accounts (clients).

Individual

This record type is for clients and prospective clients. It should be assigned to the `Individual` page layout.

Professional Relationship

This record type is for lawyers, accountants, and other professional relationships. It should be assigned to the `Professional Relationship` page layout.

Configure Users' Page Layouts

Ensure that the following components are included in users' page layouts, which can be configured from the management settings for each object by going to Page Layouts.

Home Tab Page Layouts

The home page layout for financial advisors, titled FA Home Page, should include the following components:

- Items To Approve
- Tasks
- Calendar
- Dashboard Snapshot
- Search
- Create New
- Recent Items
- Messages & Alerts
- Custom Links

Person Accounts Page Layout

The page layouts for person accounts (clients) should include the following related lists:

- Financial Accounts
- Holdings
- Client Interests
- Know Your Client
- Open Activities
- Activity History
- Partners
- Account Team
- Notes & Attachments

Verifying the Know Your Client Approval Process

Salesforce for Wealth Management includes an approval process that routes Know Your Client forms to the appropriate Salesforce users for approval.

SEE ALSO:

- [Salesforce for Wealth Management](#)
- [Managing Wealth Management Clients](#)
- [Find Object Management Settings](#)

Manage the Know Your Client Approval Process



Note: This information applies to Wealth Management, not to [Financial Services Cloud](#).

About the Know Your Client Approval Process

An approval process automates how records are approved in Salesforce. An approval process specifies each step of approval, including who to request approval from and what to do at each point of the process.

The Know Your Client approval process is included in Salesforce for Wealth Management and has the following general definition:

1. A financial advisor creates a new Know Your Client record.



Note: Data from a saved Know Your Client record can be merged into a printable Microsoft Word document using the provided mail merge template.

2. A financial advisor submits the Know Your Client record for approval, which sets the following actions in motion:

- The Know Your Client record is locked and cannot be edited
- `KYC Approval Status` becomes "Pending Approval"
- `Date Know Your Client Submitted` becomes today
- Know Your Client record type becomes "KYC Submitted"
- An approval request is routed to the appropriate Salesforce user for review, and he or she is also sent an email notification using the appropriate email template

3. The lead financial advisor approves or rejects the approval request, which causes the following actions:

- The record continues to be locked and cannot be edited
- `KYC Approval Status` becomes "Approved" or "Rejected"
- `Date KYC Approved/Rejected` becomes today
- If the record was approved, a follow-up task is scheduled for the financial advisor to review the Know Your Client form in six months

Activating the Know Your Client Approval Process

To activate the Know Your client approval process:

1. From Setup, enter `Approval Processes` in the `Quick Find` box, then select **Approval Processes**.

USER PERMISSIONS

To create, edit, delete, or clone approval processes:

- `Customize Application`

To view approval processes:

- `View Setup and Configuration`

2. In the `Manage Approval Processes For` drop-down list, select “Know Your Client.”
3. Click **Activate** next to the approval process name.

SEE ALSO:

[Salesforce for Wealth Management](#)
[Managing Wealth Management Clients](#)

Navigate the Salesforce for Wealth Management App

To access the Salesforce for Wealth Management app, go to the Lightning Platform app menu in the top right corner of any Salesforce page and select Salesforce for Wealth Management. To get started on any task, just click the tab you want.

 **Note:** This information applies to Wealth Management, not to [Financial Services Cloud](#).

SEE ALSO:

[Salesforce for Wealth Management](#)
[Managing Wealth Management Clients](#)

Managing Wealth Management Clients

 **Note:** This information applies to Wealth Management, not to [Financial Services Cloud](#).

Clients are exclusively available in Salesforce for Wealth Management. A client is a person who you advise or do business with, a prospect who you potentially will do business with, or a professional relationship such as an accountant or lawyer. You can manage your clients on the Clients tab. In standard Salesforce terminology, clients are called “[accounts](#).” However, Salesforce for Wealth Management uses the term “clients.”

Clients have all of the standard capabilities of account records.

In addition, the special capabilities of clients are as follows:

Client Record Types

Record types are categories that allow you to organize your records. You can assign client records to the following record types:

- “Business” specifies a corporate entity or trust
- “Individual” specifies an existing or prospective client
- “Professional Relationship” specifies an accountant, lawyer, or other professional relationship

Client List Views

On the Clients tab, you can use list views to conveniently access different sets of clients. For example, select “My A Clients” to view a list of your clients who have an “A” rating.

Client Details

The client detail page includes groups of fields tailored to wealth management clients. For example, one section tracks a client's preferences in several categories — you can specify that a client is interested in vacation homes, mid-cap stocks, the retail and entertainment sectors, golf, and US politics.

USER PERMISSIONS

To view the Clients tab:

- Read on accounts

To view clients:

- Read on accounts

To create clients:

- Create on accounts and contacts

Financial Accounts Related List

The Financial Accounts related list provides an overview of the client's financial accounts, such as account names, account numbers, and current values. This information comes from the records on the Financial Accounts tab.

Holdings Related List

The Holdings related list provides an overview of the client's owned assets such as funds, stocks, and bonds. For each holding you can see values such as market value, last price, purchase price, and number of shares. This information comes from the records on the Holdings tab. Note that each holding is associated with a financial account record.

Client Interests Related List

The Client Interests related list provides an overview of the securities that the client is interested in buying or selling. This information comes from the records on the Client Interests tab.

Know Your Clients Related List

The Know Your Clients related list provides an overview of the Know Your Client forms that are associated with the client. This information comes from the records on the Know Your Clients tab.

Relationships Related List

A relationship refers to a client who has a role in the life of another client, such as a spouse, child, accountant, or attorney. Relationships are tracked in the Relationships related list on the client detail page, which is available as an option. In standard Salesforce terminology, relationships are called “partners.” However, Salesforce for Wealth Management uses the term “relationships.”

Client Team Related List

The Client Team related list tracks the financial advisors and other Salesforce users who are involved in the management of a particular client. In standard Salesforce terminology, client teams are called “account teams.” However, Salesforce for Wealth Management uses the term “client teams.”

Relationship Group Members Related List

The Relationship Group Members related list displays the relationship groups of which the client is a member. It is available as an option and is called “Household Members” in some organizations.

SEE ALSO:

[Salesforce for Wealth Management](#)

[Navigate the Salesforce for Wealth Management App](#)

Salesforce for Wealth Management Reports and Dashboards

 **Note:** This information applies to Wealth Management, not to [Financial Services Cloud](#).

Salesforce for Wealth Management Reports

Salesforce for Wealth Management offers industry-specific reports, which are grouped in the following folders on the Reports tab:

- Client Reports
- Client Interest Reports
- Financial Account Reports
- Holdings and WM Asset Reports
- Know Your Client Reports

To access these reports, select the appropriate folder from the drop-down list on the Reports tab, then click the appropriate report name.

USER PERMISSIONS

To run reports:

- Run Reports

AND

Read on the records included in reports

To view dashboards:


- Run Reports

AND

Access to view dashboard folders

Salesforce for Wealth Management Dashboards

Salesforce for Wealth Management offers industry-specific dashboards, such as a dashboard of financial accounts that allows you to analyze your book of business. To access these dashboards, go to the Dashboards tab and select the appropriate dashboard name from the drop-down list.

 **Note:** You can see a dashboard snapshot on the Home tab.

SEE ALSO:

[Salesforce for Wealth Management](#)

[Navigate the Salesforce for Wealth Management App](#)

Wealth Management Relationship Groups


What Are Relationship Groups?

Relationship groups are custom object records used to store collections of [accounts](#). For example, you can use relationship groups to manage the following:

- A household of people who reside at the same address
- An extended family consisting of multiple generations of relatives
- A professional group such as a medical practice or a law firm
- The trustees and beneficiaries of a trust

The accounts that you add to relationship groups are called *relationship group members*. For more information, see [Relationship Group Members](#) on page 510.

Who Can Use Relationship Groups?

 **Note:** Relationship groups are only available upon request to [Salesforce for Wealth Management](#) customers. Note that the Relationship Groups tab may be named “Households” in Salesforce for Wealth Management organizations. To enable relationship groups, contact your Salesforce representative.

Your organization must have implemented [person accounts](#) before you can use relationship groups.

Your administrator can enable relationship groups by installing the Relationship Groups custom app.

What Are the Benefits of Relationship Groups?

Relationship groups allow you to:

- Track the familial and professional roles of different relationship group members
- Assign primary and secondary designations to the two most important members of a relationship group
- View roll-up related lists of all [activities](#) for the members of a relationship group
- View roll-up related lists of the custom objects that are related to the accounts in a relationship group

EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups
- AND
- Create and Edit on relationship group members
- AND
- Read on accounts

To delete relationship groups:

- Delete on relationship groups

To remove relationship group members:

- Delete on relationship group members

[Relationship Group Considerations](#)

[Relationship Group Members](#)

Relationship groups let you group closely related accounts together so you can manage them easier. The accounts that you add to the group are the members. For example, a relationship group might be medical practice or a law firm, while the individual doctors or lawyers would be the group members.

[Using Relationship Groups](#)

[Creating Relationship Groups](#)

[Adding Accounts to Relationship Groups](#)

[Editing the Members of Relationship Groups](#)

[Displaying and Editing Relationship Groups](#)

[Searching for Relationship Groups](#)

[Deleting Relationship Groups](#)

[Removing Members from Relationship Group Members](#)

[Relationship Group Fields](#)

SEE ALSO:

[Using Relationship Groups](#)

[Relationship Group Considerations](#)

Relationship Group Considerations

To make the most of relationship groups and relationship group members, review the notable behaviors and limitations below.

Relationship Group Considerations

Relationship groups:

- Support roll-up related lists for activities and custom objects only.
- Are completely separate from the Partners related list on accounts.
- Do not have directly associated activities, notes, or attachments.
- Only support required custom fields that are configured with a default value. Such custom fields will display on relationship group detail and edit pages, but not in the relationship groups wizard.
- Only support validation rules on custom fields that were added after the Relationship Group managed package was installed.
- Cannot be renamed to a different name than “relationship group,” because they are a custom object in a managed package.
- Can be created and edited through the relationship group wizard regardless of field-level security settings on the `Description` field.

Relationship Group Member Considerations

Relationship group members:

- Are limited to a maximum of 20 per relationship group.
- Cannot be imported via the import wizard for custom objects.
- Do not support tagging.

EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

- Have the division of the parent relationship group.
- Are owned by both the parent relationship group and the parent account.
- Do not support validation rules.
- Do not support universally required fields.
- Cannot be renamed to a different name than “relationship group member,” because they are a custom object in a managed package.
- Can have the fields `Primary`, `Secondary`, and `Include in Roll-Up` edited through the relationship group wizard even when the field-level security on those fields is “read-only.”
- Cannot be included in workflow rules or approval processes.
- Cannot be used in Salesforce to Salesforce.
- Are not supported in Connect Offline.
- Are only supported in API version 11.0 and later. In the API, using the `upsert` call on relationship group members is not supported.


SEE ALSO:

[Wealth Management Relationship Groups](#)

[Relationship Group Members](#)

Relationship Group Members

Relationship groups let you group closely related accounts together so you can manage them easier. The accounts that you add to the group are the members. For example, a relationship group might be medical practice or a law firm, while the individual doctors or lawyers would be the group members.

 **Note:** Relationship groups are only available upon request to [Salesforce for Wealth Management](#) customers. Note that the Relationship Groups tab may be named “Households” in Salesforce for Wealth Management organizations. To enable relationship groups, contact your Salesforce representative.

What Are Relationship Group Members?

The accounts that you add to relationship groups are called *relationship group members*. Like relationship groups, relationship group members are custom objects. Each relationship group member record represents an association between an account and a relationship group. For example, if you add the account “Mary Smith” to the relationship group “Smith Family,” a relationship group member record is created that links Mary Smith to the Smith Family.

Relationship group members are unique because they have two master-detail relationships: one with accounts and another with relationship groups. When discussing these master-detail relationships, accounts and relationship groups are sometimes referred to as the “parents” of relationship group members.

What Are the Limits on Relationship Group Members?

You can add a given account to up to 200 relationship groups. For example, an account “Joseph Brown” who is an attorney may be a member of several relationship groups—in some cases as an attorney, in other cases as a family member.

You can add up to 20 accounts to a particular relationship group. For example, a relationship group that represents a large extended family including grandparents, children, and grandchildren cannot have more than 20 relationship group members.

In a particular relationship group, you can specify only one relationship group member as primary, and only one relationship group member as secondary. In addition, you cannot add the same account more than once to a particular relationship group.

Where Can I View Relationship Group Members?

The Relationship Group Members related list displays on both the relationship group detail page and the account detail page. On the relationship group detail page, the related list summarizes the accounts that are members of the given relationship group. On the account detail page, the related list summarizes the relationship groups of which the given account is a member.

Relationship Group Member Fields

Relationship group members have the following fields.

Field Name	Description
Account	The name of the account.

EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups
- AND
- Create and Edit on relationship group members
- AND
- Read on accounts

To delete relationship groups:

- Delete on relationship groups

To remove relationship group members:

- Delete on relationship group members


Field Name	Description
Role	The familial, professional, or other role that an account has in a relationship group - for example, Client, Spouse, Child, Attorney, or Accountant. Your administrator defines the available values in this picklist.
Primary	Designates an account as the most important member of the relationship group. Only one relationship group member can be specified as primary.
Secondary	Designates an account as the second-most important member of the relationship group. Only one relationship group member can be specified as secondary.
Include in Roll-up	Specifies whether the activities and custom objects of an account display in related lists on the relationship group detail page.
Priority	Does not display in the relationship group wizard, but is available as a column in the Relationship Group Members related list on account and relationship group detail pages. This column displays the primary (👤) or secondary (👥) icon as appropriate next to account names.
Unique Key	This is a system field that prevents duplicate records. It does not display to users in Salesforce but is visible in the Lightning Platform API. This field should be treated as read only; attempts to modify it through the API will be ignored.

SEE ALSO:

[Wealth Management Relationship Groups](#)

[Relationship Group Considerations](#)

Using Relationship Groups

 **Note:** Relationship groups are only available upon request to [Salesforce for Wealth Management](#) customers. Note that the Relationship Groups tab may be named “Households” in Salesforce for Wealth Management organizations. To enable relationship groups, contact your Salesforce representative.

You can perform the following actions with relationship groups:

- [Creating Relationship Groups](#)
- Add an account to the relationship group. To add an account, go to the account’s Relationship Group Members related list, and click **New**.
- [Editing the Members of Relationship Groups](#)
- [Displaying and Editing Relationship Groups](#)
- [Searching for Relationship Groups](#)
- [Deleting Relationship Groups](#)
- [Removing Members from Relationship Group Members](#)

SEE ALSO:

[Wealth Management Relationship Groups](#)

EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups

AND

Create and Edit on relationship group members

AND

Read on accounts

To delete relationship groups:

- Delete on relationship groups


To remove relationship group members:

- Delete on relationship group members

Creating Relationship Groups

Salesforce provides an easy wizard so you can quickly create and edit relationship groups. To create a new relationship group:

1. On the Relationship Groups home page, click **New** next to `Recent Relationship Groups`.
2. Enter the name and description of the relationship group:
 - a. Enter a name for the relationship group.
 - b. Optionally, enter a description for the relationship group.
 - c. Click **Next** to continue.
3. Define the members of the relationship group:
 - a. Use the lookup fields to select the appropriate records.
 - b. In the `Role` drop-down list, specify the appropriate role for each person in the relationship group.
 - c. Designate one of the records as primary.
 - d. Designate another record as secondary.
 - e. Optionally, click **Add Member** as needed to include additional members. You can add a maximum of 20 records to a relationship group.
 - f. Select `Include in Roll-up` for the accounts whose related activities and custom objects should display on the relationship group detail page.
 - g. Click **Save** to finish.
4. After completing the wizard, the detail page of the new relationship group displays so you can review your work.

 **Note:** You can also add an account to a new or existing relationship group. To add an account, go to the Relationship Group Members related list and click **New**.

SEE ALSO:

[Wealth Management Relationship Groups](#)
[Relationship Group Members](#)

EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups
- AND
- Create and Edit on relationship group members
- AND
- Read on accounts

To delete relationship groups:

- Delete on relationship groups

To remove relationship group members:

- Delete on relationship group members

Adding Accounts to Relationship Groups

Salesforce provides an easy wizard so you can quickly create and edit relationship groups. On the Accounts tab, you can add an account to a new or existing relationship group:

1. Open the detail page for the account you want to add to a relationship group.
2. On the Relationship Group Members related list, click **New**.
3. Choose whether to add the account to an existing relationship group or a new relationship group:
 - If you are adding the account to an existing relationship group, click the lookup icon to find the appropriate relationship group.
 - If you are adding the account to a new relationship group, enter a name and optionally a description for the new relationship group.
4. Click **Next**.
5. Define the members of the relationship group:
 - a. Use the lookup fields to select the appropriate records.
 - b. In the **Role** drop-down list, specify the appropriate role for each person in the relationship group.
 - c. Designate one of the records as primary.
 - d. Designate another record as secondary.
 - e. Optionally, click **Add Member** as needed to include additional members. You can add a maximum of 20 records to a relationship group.
 - f. Select **Include in Roll-up** for the accounts whose related activities and custom objects should display on the relationship group detail page.
 - g. Click **Save** to finish.
6. After completing the wizard, the detail page of the new relationship group displays so you can review your work.

SEE ALSO:

[Wealth Management Relationship Groups](#)

EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups
- AND
- Create and Edit on relationship group members
- AND
- Read on accounts

To delete relationship groups:

- Delete on relationship groups

To remove relationship group members:

- Delete on relationship group members

Editing the Members of Relationship Groups

Salesforce provides an easy wizard so you can quickly create and edit relationship groups. To edit the members of a relationship group:

1. Click **New** or **Edit** on the Relationship Group Members related list of a relationship group detail page. Alternatively, click **Edit** next to a member listed on the Relationship Group Members list of an account detail page.
2. To remove an account from the relationship group, click **[remove]**.
3. To add an account to the relationship group, enter an account name in an empty Account lookup field.
4. In the **Role** drop-down list, choose a role for each member of the relationship group.
5. In the **Primary** column, select a primary relationship group member.
6. In the **Secondary** column, select a secondary relationship group member.
7. Select **Include in Roll-up** for the accounts whose related activities and custom objects should display on the relationship group detail page.
8. Optionally, click **Add Member** as needed to include additional members. You can add a maximum of 20 records to a relationship group.
9. Click **Save** to finish.

SEE ALSO:

[Wealth Management Relationship Groups](#)

[Relationship Group Members](#)

EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups
- AND
- Create and Edit on relationship group members
- AND
- Read on accounts


To delete relationship groups:

- Delete on relationship groups

To remove relationship group members:

- Delete on relationship group members

Displaying and Editing Relationship Groups

 **Note:** Relationship groups are only available upon request to [Salesforce for Wealth Management](#) customers. Note that the Relationship Groups tab may be named “Households” in Salesforce for Wealth Management organizations. To enable relationship groups, contact your Salesforce representative.

The following sections describe how to display and edit relationship groups:

- [Accessing the Relationship Groups Tab](#)
- [Viewing Relationship Group Lists](#)
- [Displaying Relationship Group Records](#)
- [Editing Relationship Group Records](#)

Accessing the Relationship Groups Tab

The Relationship Groups tab is available by default in the Relationship Groups app. To switch to the Relationship Groups app, select Relationship Groups from the Lightning Platform app menu in the top right corner of every Salesforce page.

Note that your administrator may have customized your profile to also display the Relationship Groups tab in other apps.



Viewing Relationship Group Lists

You can work with relationship group list views as you would any other custom object. .

Displaying Relationship Group Records

To open an individual relationship group record, click a relationship group name on the relationship groups home page or a relationship groups list view.

Note the following when viewing related lists on the relationship group detail page:

- The Relationship Group Members related list summarizes the accounts that are members of the relationship group. In the `PRIORITY` column, the icons ( and ) show which accounts are defined as primary or secondary for the relationship group. For more information on relationship group members, see [Relationship Group Members](#) on page 510.
- The Activity History and Open Activities related lists on a relationship group are roll-ups of activities for the relationship group members; relationship groups themselves do not have their own tasks and events.
- If accounts have a relationship with a custom object, a related list for that custom object can display on the relationship group detail page. This requires that `Include in Roll-Up` is selected on an associated relationship group member record. For example, in the following theoretical scenario, the vehicles associated with members of the Stone family display in a Vehicles related list on both the account detail page and the relationship group detail page:
 - The account Sam Stone has a Toyota Prius car tracked in the Vehicles custom object related list on the account detail page
 - The account Chris Stone has a Ford Mustang car tracked in the same related list
 - Sam and Chris Stone are members of the Stone Family relationship group
 - Both associated relationship group member records have `Include in Roll-Up` selected

EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups
- AND
- Create and Edit on relationship group members
- AND
- Read on accounts

To delete relationship groups:

- Delete on relationship groups

To remove relationship group members:

- Delete on relationship group members

Editing Relationship Group Records

On the relationship group detail page, you can:

1. Click **Edit** to change the fields in the Relationship Group Detail section.
2. Click **Delete** to delete the relationship group. For more information, see [Deleting Relationship Groups](#) on page 518.
3. Click **Clone** to create a copy of the relationship group.
4. On the Relationship Group Members related list, click **New** to add an account to the relationship group. For more information, see [Editing the Members of Relationship Groups](#) on page 515.
5. On the Activity History and Open Activities related lists, click the buttons such as **New Task** and **Log a Call** to add activity records for a relationship group member. By default, the new activity records are associated with the primary account on the relationship group.

SEE ALSO:

[Relationship Group Fields](#)

[Wealth Management Relationship Groups](#)

Searching for Relationship Groups

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

Your administrator can customize the search layout for relationship groups to include the primary and secondary account fields, so you can view and access those account records directly from relationship group search results.

SEE ALSO:

[Wealth Management Relationship Groups](#)

Deleting Relationship Groups

Relationship groups are custom object records that you can delete as you would any other record.

A relationship group is the master object in a master-detail relationship with relationship group members. Consequently, when you delete a relationship group, all relationship group members on that relationship group are also deleted. Restoring a relationship group from the Recycle Bin also restores the associated relationship group members that were deleted. However, if you delete a relationship group that contains the same relationship group member as a deleted account, the shared relationship group member cannot be restored from the Recycle Bin.

SEE ALSO:

[Removing Members from Relationship Group Members](#)

[Wealth Management Relationship Groups](#)

EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

USER PERMISSIONS

To create or edit relationship groups and relationship group members via the wizard:

- Create and Edit on relationship groups
- AND
- Create and Edit on relationship group members
- AND
- Read on accounts

To delete relationship groups:

- Delete on relationship groups

To remove relationship group members:

- Delete on relationship group members

EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

USER PERMISSIONS

To delete a relationship group:

- Delete on relationship groups

Removing Members from Relationship Group Members

To remove an individual relationship group member, go to the Relationship Group Members related list on an account or relationship group detail page and click **Del** next to the appropriate relationship group member record.

Relationship group members are unique because they have two master-detail relationships: one with accounts and another with relationship groups. Also, there are rules that govern the number of relationship group members a relationship group can have, as well as prevent more than one relationship group member from being specified as either primary or secondary on a given relationship group. The following considerations apply to deleting relationship group members:

Deleting Accounts with Relationship Group Members

When you delete an account, its associated relationship group members are also deleted. However, you cannot restore an account from the Recycle Bin if restoring the account's deleted relationship group members would violate rules such as the maximum of 20 relationship group members per relationship group. Also, if you delete an account that shares a relationship group member with a deleted relationship group, the shared relationship group member is automatically purged from the Recycle Bin.

Deleting Relationship Groups with Relationship Group Members

See [Deleting Relationship Groups](#) on page 518.

Restoring Individual Relationship Group Members

You cannot restore an individual relationship group member from the Recycle Bin in the following scenarios:

- Restoring the record would violate rules such as the maximum of 20 relationship group members per relationship group
- The deleted relationship group member was deleted during an account merge

Relationship group members are automatically and irrecoverably removed from the Recycle Bin in the following scenarios:

- If both parents (the relationship group and the account) of a relationship group member are deleted, the relationship group member is removed
- If a relationship group member is deleted individually and then one of its parents is deleted, the relationship group member is removed

SEE ALSO:

[Relationship Group Members](#)

[Deleting Relationship Groups](#)

Relationship Group Fields

A relationship group custom object has the following default fields, listed in alphabetical order.

Name	Description
Description	A text description of the relationship group. Up to 255 characters are allowed.
Primary Name	The name of the primary relationship group member .
Secondary Name	The name of the secondary relationship group member .

EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

USER PERMISSIONS

To remove a relationship group member:

- Delete on relationship group members

EDITIONS

Available in: Salesforce Classic

Available in: Salesforce for Wealth Management

Name	Description
Total Members	The total number of members in the relationship group.

To add custom fields to relationship groups, from the object management settings for relationship groups, go to the fields area, then click **New** in the Custom Fields & Relationships section.

SEE ALSO:


[Wealth Management Relationship Groups](#)

[Using Relationship Groups](#)

Drive Sales with Partners

Partners are the companies with which you collaborate to close your sales deals. For each opportunity or account you create, the Partners related list allows you to store information about your partners and the roles they play in the opportunity or account. A partner must be an existing account within Salesforce.

If your organization has been enabled for partners, you can create partner accounts. Partner accounts are business accounts that a channel manager uses to manage partner organizations, partner users, and activities. **They are completely separate from account partnerships that are displayed in the Partners related list on an account.** For more information about creating and managing partner portals, see [Create and Manage Partner Portals](#).

 **Tip:** If your organization uses person accounts, you can use partner roles to relate person accounts to each other. For example, if you have individual person account records for several members of a household or family, then you can use partner roles such as “Spouse” or “Sibling” to associate those records.

[Sharing Information with Partners](#)

Partners are companies or individuals that directly drive sales or help you close sales deals.

[Viewing and Adding Partners](#)

The opportunity and account detail pages include a Partners related list for viewing and adding partner relationships.

[Partner Fields](#)

A partner has the following fields, listed in alphabetical order.

[Deleting Partners](#)

Removing a partner from an opportunity or account removes the partner's relationship with the opportunity or account, but does not delete the account.

[Create a Partner Portal](#)

Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

EDITIONS

Available in: **Salesforce Classic**

Available in: **All Editions** for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions for organizations activated after Summer '09

Sharing Information with Partners

Partners are companies or individuals that directly drive sales or help you close sales deals.


You can track partner sales in your Salesforce org in different ways.

- [Add partners](#) to account and opportunity records.
- Enable your org for partners, create partner accounts, create partner users, and collaborate with them on your channel sales data in a partner community (recommended) or partner portal.
- Use Salesforce to Salesforce if your partner has a Salesforce org of their own.

Viewing and Adding Partners

The opportunity and account detail pages include a Partners related list for viewing and adding partner relationships.

- To view account information for a specific partner, click the partner's name in the Partners related list.

If you do not have access to view and edit a partner account, the account name appears in the related list but you have no access to other information about that account.
- Click **Del** next to a partner to the partner relationship.
 -  **Note:** If you change the account for an opportunity that has partners, all partners are deleted from the Partners related list.
- To add a partner to an opportunity or account:
 1. Click **New** in the Partners related list.
 2. For opportunities only, select the `Primary` option to indicate the primary partner for the opportunity, if applicable.

An opportunity can have only one primary partner. Setting a new primary partner automatically removes the "Primary" status from any existing primary partner.

Marking a partner as "Primary" allows you to report on the partner in all of the opportunity reports.
 3. In the `Partner` column, enter the name of an existing account by typing into the box or clicking the lookup icon to perform an account search. Alternatively, click **New** from the lookup dialog to create a new account.
 4. In the `Role` column, choose the role that the partner account plays in the current account or opportunity.

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USER PERMISSIONS

To add partners to an account:

- Edit on accounts
AND
Read on opportunities

To add partners to an opportunity:

- Read on accounts
AND
Edit on opportunities

-  **Note:** Selecting a partner on an account or opportunity automatically creates a reverse partner relationship so that both accounts list the other as a partner. The role you select is applied to the partner account; in the current account, the reverse role is applied. Your administrator sets the available roles and the corresponding reverse roles when editing the `Partner Role` picklist value. Your administrator has the ability to customize the columns that display in the related list by editing the page layout.

Partner Fields

A partner has the following fields, listed in alphabetical order.

Field	Description
Partner Name	Name of partner. You can enter an existing account, or use the lookup icon to search for (or optionally, create) a new account.
Primary	Option that specifies the primary partner for the opportunity.
Role	Role of partner for a specific opportunity or account. The role is correlated to the reverse role, applied to the reverse partner relationship. Select from a picklist of available roles, which are set by an administrator.

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Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

Deleting Partners

Removing a partner from an opportunity or account removes the partner's relationship with the opportunity or account, but does not delete the account.

 **Note:** If you change the account for an opportunity that has partners, all partners are deleted from the Partners related list.

To remove a partner relationship from an opportunity or account, click **Del** next to the partner's name.

Removing a partner affects an opportunity or account in the following ways.

Deleting a Partner From	Does This
An account	Removes the partner from the account and from <i>all</i> opportunities for that account with which the partner was associated.
An opportunity	<p>If the partner is associated with only one opportunity for an account, the partner is removed from both the opportunity <i>and</i> the account.</p> <p>If the partner is associated with multiple opportunities for an account, the partner is removed from that opportunity <i>only</i>. The partner remains associated with other opportunities <i>and</i> with the account.</p>

Create a Partner Portal

Starting in Summer '13, the partner-portal is no longer available for organizations that aren't currently using it. Existing organizations continue to have full access. If you don't have a partner-portal, but want to easily share records and information with your partners, try Communities.

Existing organizations using partner-portals may continue to use their partner-portals or transition to Communities. Contact your Salesforce Account Executive for more information.

For detailed information about creating a partner portal, see the [Create and Manage Partner Portals](#) guide. Generic information about user management, sharing, and CRM data remains available from the Salesforce help.

Resources for the Sales Professional

In addition to online help, Salesforce creates guides and tip sheets to help you learn about our features and successfully administer Salesforce.

[For End Users](#)

[For Admins](#)

[Data.com Clean](#)

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions for organizations activated before Summer '09

Available in: **Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions for organizations activated after Summer '09

USER PERMISSIONS

To delete partners from an account:

- Edit on accounts

To delete partners from an opportunity:

- Edit on accounts

AND

Edit on opportunities

EDITIONS

Available in: Salesforce Classic

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

	For End Users	For Admins
Implementing Data.com Clean	✓	
Account Management		
Getting Microsoft® Outlook® and Salesforce in Sync	✓	
Get Ready to Sync Contacts and Events with Exchange Sync (Beta)	✓	
Tips & Hints for Sales Reps	✓	
Tips for Using Content Deliveries	✓	
Tips for Using HTML Email Templates	✓	✓
Using Lightning Platform Connect for Office	✓	
Salesforce Bulk Mail Merge Process	✓	
Guidelines for Uploading Mail Merge Templates	✓	
Sample Mail Merge Templates (Zip file)	✓	
Getting Started with Lightning Platform Connect Offline	✓	
Tips & Hints for Working with Territories	✓	
Pipeline Management		
Using Customizable Forecasts —For users of Customizable Forecasting. For more information, search for “Customizable Forecasting Overview” in the Salesforce Help.	✓	
Tips & Hints for Products & Schedules	✓	
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Salesforce Mobile Classic User Guide for iPhone	✓	
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