
Salesforce Style Guide for Documentation and User Interface Text

Salesforce, Summer '18



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ABOUT THIS GUIDE

The *Salesforce Style Guide for Documentation and User Interface Text* provides terminology and usage guidelines for user interface text and customer-facing documentation materials.

This guide has the following sections:

- [Styles A-Z](#)—Alphabetical reference of basic guidelines for grammar and usage for documentation and user interface text.
- [Glossary](#)—Definitions and usage of Salesforce terms and other key user interface terms.



Note:

- **Other Style Questions?** For other general style issues, we follow the conventions in *The Chicago Manual of Style* and the [Microsoft Manual of Style for Technical Publications](#).
- **Spelling Questions?** For spelling questions, refer to [dictionary.reference.com](https://www.dictionary.reference.com), which is based on the *Random House Unabridged Dictionary*.

Benefits

Standard terminology and usage guidelines provide a foundation for a consistent style, more professional user interface and educational materials, and an easy-to-learn user interface.

- **Consistent** - Usage guidelines allow content providers to produce materials that follow a uniform style.
- **Professional** - Consistent style and usage guidelines help produce more professional-looking documents and user interface text.
- **Easy-to-Learn** - Users can learn the system faster and more efficiently if all customer-facing user interface text and documents use the same terminology.

Audience

This guide is for users who build applications, write user manuals, product training programs, and any instructional or reference materials, including:

- Technical Writers
- Curriculum Developers
- Trainers
- Editors and Proofreaders
- Product Managers
- Developers
- User Experience Professionals

STYLES A-Z

This section provides an alphabetic reference of basic guidelines for grammar and usage for documentation and user interface text. See the [Glossary](#) and specific entries in this guide for usage of Salesforce-specific terms.

A

A, An

- Use *a* before words that start with a consonant or a “yew” sound:
 - A university
 - A hacker
- Use *an* before words that start with a vowel or an unsounded consonant:
 - An hour
 - An electrical engineer
- If an acronym is generally read as alphabetic letters, choose the article according to the first letter:
 - An API
 - A URL
- Add *a*, *an*, *the*, and other articles for ease of reading, both in text and lists that consist of complete phrases.

Abbreviations

In general, abbreviated terms are repeated often or appear in tables or other tight spaces.

Don't confuse your reader with too many abbreviations or too much [jargon](#). When in doubt, spell out the term.

General Rules

When to spell out

The first time you use an acronym or abbreviation that isn't obvious, spell out the word or phrase and follow it with the shortened form in parentheses. For example: A local area network (LAN). Use the acronym or abbreviation in all subsequent references. However, in long manuals or manuals that include sections that are read separately, repeat the full name and abbreviation the first time a term is used in each new topic.

No apostrophes for plurals

For example, the plural of FAQ is FAQs, not FAQ's.

No periods

Don't use periods with most acronyms or abbreviations for technical terms, standard nontechnical abbreviations, or abbreviations for units of measure:

- ANSI (acronym)
- MB (technical abbreviation)

- PhD (nontechnical abbreviation)
- ft (unit of measure)

Capitalization

- When spelling out an acronym, only capitalize the individual words if they're proper nouns. Use all capital letters for the acronym itself.
- Use all lowercase for file extensions. For examples, see [File Names and Extensions](#).
- Don't alter the capitalization of abbreviations in titles. For examples, see [Capitalization](#).
- Use uppercase to document time. For examples, see [AM, PM](#).
- If an acronym is read as alphabetic letters, choose the article according to the first letter. For example: an API, a URL.

Common Acronyms and Abbreviations

Certain acronyms and abbreviations are so common that you never have to spell them out. For example: IBM, RAM, PC, US.

Measurements and Units

- Don't use abbreviations like *K* for thousand or *M* or *MM* for million.
- If the abbreviations are common to the audience, it's acceptable to abbreviate measurements, as in KB and GHz, .
- Omit a space between a number and a single-letter abbreviation or unit symbol: 90%, 401(k)
- For time values in a twelve-hour system, use AM/PM preceded by a space. For example, 10:30 PM. Don't use a.m., p.m., A.M., P.M., am, or pm.

Above

Don't use in UI text to describe the location of an element on an application page.

Don't use in documentation to describe the location of an item in a section. If necessary, use *preceding* or *previous*.

Add-in

Software that adds functionality to a larger program. Always hyphenate and don't use as a synonym for [plug-in](#), which is a component that helps browsers support the file format of an object embedded in an HTML page. For example: Connect for Outlook is an add-in for Microsoft Outlook.

Admin, Administrator

Use *Salesforce admin*, but use *Salesforce administrator* for UI text and end-user documentation related to logging in. If you're using the phrase *Salesforce admin* more than a few times in a topic, it's OK to shorten to *admin*.

Affect, Effect

- Affect (verb): to influence.
For example: Calendar sharing settings affect the visibility of items on a calendar.

- Effect (verb): to bring about.
For example: Effect change. Don't use effect as a verb in technical documentation.
- Effect (noun): result, outcome (avoid).
For example: Changes take effect immediately.

All Right, Alright

Two words. *Alright* is incorrect.

A Lot, Many

- **A lot** - to a great degree or extend
- **Many** - A quantifier that can be used with count nouns and is often preceded by 'as' or 'too' or 'so' or 'that'; amounting to a large but indefinite number

In technical writing, we almost always describe quantities.



Example:

- I feel a lot better.
- The feature has many settings.

Allow, Let

Avoid. Try to restructure the sentence so the reader is the subject.

Avoid

Salesforce allows you to customize page layouts.

Better

You can customize page layouts.

Alphabetizing

When alphabetizing terms, start with spaces and hyphens, followed by numbers, followed by letters. Always treat a hyphen as a space.
For example:

- W2L
- Web Tab
- Web-to-Lead
- Web2Lead

Alternately, Alternatively

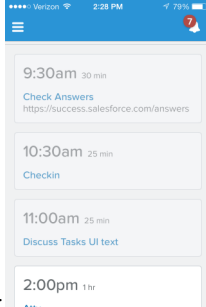
- Alternately: to interchange repeatedly and regularly.
- Alternatively: to choose as another possible path.

AM, PM

For time values in a twelve-hour system, use AM/PM preceded by a space. For example, 10:30 PM. Don't use a.m., p.m., A.M., P.M., am, or pm.



Note: The Today app is the only exception. In Today, use am/pm with no space. Refer to the screenshot for an



example.

This guideline was updated for the Winter '15 release and is a change from earlier practice.

Among

Use instead of *between* when referring to more than two things.

Ampersand (&)

Use an ampersand (&) only when screen real estate is an issue or when it's part of a company name, logo, proper noun, or title. Otherwise, spell out *and*.

And/Or

Don't use. Instead, rewrite the sentence to clarify the meaning. Note that *or* can mean *either or both*.



Example: You can save the quote using the current name or a new name.

Apostrophes

In code samples, use straight apostrophes ('). Elsewhere, use curved apostrophes—the same character as a single closing quotation mark. In release versions and other words or numbers that start with an apostrophe, use an apostrophe, not a single opening quotation mark.

In Plurals

- Don't use apostrophes to form plurals of proper nouns, acronyms, and numerals. For example, the plural of FAQ is FAQs, not FAQ's.
- Don't pluralize single letters, symbols, or mathematical signs by adding an apostrophe and an s.
 - **Incorrect:** Salesforce replaces unrecognizable characters with @'s.
 - **Correct:** Salesforce replaces unrecognizable characters with the at (@) sign.
- To form the plural of a numeral, add s but no apostrophe: Type three 2s.
- In abbreviations for measurements, don't add an s to indicate plurality. For example: 10 oz or 30 mm

In Possessives

- To form the possessive case of singular nouns, including proper nouns ending in an s or z sound, use an apostrophe followed by an s.
- To form the possessive of plural nouns, add an apostrophe only.
- Don't use an apostrophe in these possessive pronouns: his, hers, its, ours, yours, theirs, and whose.

Application

Use *app* unless you're referring to:

- The Salesforce application. Use just Salesforce, if the context is clear.
- A part of a license, permission, or product name, such as in "Customize Application" permission or License Management Application

Articles

Add *a*, *an*, *the*, and other articles for ease of reading, both in text and lists that consist of complete phrases.

Assure, Ensure, Insure

- *Ensure* means to make certain; don't use *assure* to express this meaning, because *assure* can also mean something else.
- *Assure* means to set someone's mind at rest.
- *Insure* means to indemnify against loss.

B

Below

Don't use in UI text to describe the location of an element on an application page.

Don't use in documentation to describe the location of an item in a section. If necessary, use [later](#) or [following](#).

Brackets ([])

- Use brackets to set off information already within parentheses.
Use brackets with commands or code syntax to enclose optional characters and arguments. For example: `fileAttachments[0]`
`= fileAttachment;` When using this convention, be sure to explain it to the reader.
- When parentheses or brackets enclose an independent sentence, place the period or comma inside. Otherwise, place the period or comma outside.

Buttons

UI Text

- When naming buttons, name the action that the button will trigger, especially if it is potentially destructive. For example, in a warning message dialog box, **Delete All** and **Cancel** buttons are clearer than **OK** and **Cancel** buttons.

- Use title capitalization for button names, such as **Clone** or **Run Report**. Don't use ending punctuation in button labels.
- Don't use any special formatting when referring to buttons.

Documentation

- Use bold text when referring to buttons: Click **Save**.
- Use the name of the button exactly as it appears on screen.
- Don't list the following UI element types unless needed for clarity or navigation: button, checkbox, drop-down button, field, icon, menu, link, radio button, or window. For example, write *Click **Save***, not *Click the **Save** button*.

C

Can, Could, May, Might, Must, Should

Avoid the modal verbs could, may, might, and should in technical documentation. Modal verbs are ambiguous and leave the reader wondering what to do.

- *Can* means the ability to do something. Avoid *could*.
- *May* means permission to do something. Avoid *may*. We rarely indicate permission to do something in the documentation. Use *can* for the ability to do something.
- *Might* means it's possible to do something. Avoid *might* and use an imperative instead. For example, instead of saying "You might consider XYZ" use "Consider XYZ".
- *Must* means it's necessary to do something. Avoid *should*. Use *must* for necessity or rephrase as "Salesforce recommends..." to tell a customer to do something.

Canceled, Canceling, and Cancellation

Use these preferred spellings. Never use *cancelling*, *cancelled*, or *cancellation* (using two "els" is correct for cancellation).

Capitalization

Don't capitalize words in generic usage: Unless a word is a proper noun, use lowercase. For example, "Refer to the style guide for capitalization standards." Don't use all caps for emphasis. If a sentence begins with a code element, consider rewriting so that the element is not the first word.

Title Capitalization

Use title capitalization in titles and headings, including column headings in tables.

- Capitalize:
 - Nouns, pronouns, adjectives, verbs, adverbs, and subordinate conjunctions
 - The first and last words of titles, no matter what the words are
 - The first word after the colon in titles that include subtitles. For example: Flexible Pages: The Big Picture
 - The second element of a hyphenated compound in a title when it's a feature name, proper noun, or adjective: Real-Time Quotes, Third-Party Software
 - Key names, like Alt, Ctrl, Del

- Lowercase:
 - Articles (a, an, the), coordinating conjunctions, and prepositions
 - The *to* in an infinitive. For example: I Want to Play Piano.
 - The second element of a hyphenated compound; for example, Real-Time Quotes, Third-Party Software
- Exceptions
 - Some prepositions are part of a verb. Capitalize those prepositions in titles. (For example, in this button label, capitalize both words: Log In).
 - Retain the capitalization of abbreviations; for example, 1-kHz Oscillator, Start Sync at 12:00 AM
 - Retain the case of objects, calls, methods, SOAP headers, and any code element, such as the Account object or `create()`

Sentence Capitalization

Capitalize the first word of a phrase and any proper nouns in the phrase. Use sentence capitalization for each column entry in a table.

Acronyms, Editions, File Extensions, and Links

- When spelling out an acronym, only capitalize the individual words if they're proper nouns. Use all capital letters for the acronym itself.
- Use a colon to separate two clauses when the second explains the first. Capitalize the word following the colon only when it's a complete sentence or formal quotation. For example: *Don't forget this point: The report is due by 9:00.*
- Always capitalize both words in an edition name, as in Enterprise Edition and Group Edition. Don't capitalize *edition* when it appears by itself as a common noun: Accounts are available in all editions.
- Use all lowercase for file extensions. For example, Word adds `.docx` to a file name if you neglect to specify the file format when saving. Refer to the [Microsoft Manual of Style for Technical Publications](#).
- Capitalize link text based on context. For example, if link text includes an element that is capitalized in the UI, capitalize it in the link text too.

Referring to UI Text in Documentation

If you refer to a UI label in documentation, match the capitalization in the user interface.

- When referring to tabs, don't capitalize tab. For example, *Accounts tab*.
- Don't capitalize *report* unless it's part of the report name.

Captions

Use captions only when they are needed for clarity. Captions aren't necessary, if clear introductions precede graphics or tables.

- Avoid using captions for tables.
- Avoid using captions for graphics. Describe an image on a new line with clear introductory text.
- Don't use captions for inline graphics or simple icons.
- Use [title style](#) capitalization.

Caution

A type of [note](#). Informs users that failure to perform or avoid a specific action could result in a loss of data. For example: *Activating a refreshed sandbox replaces the existing sandbox with the refreshed version. This permanently deletes the existing version and all data in it.*

Cellular

Use *cellular* to describe the network or connection provided by a mobile carrier.

Checkboxes

- *Checkbox* is one word.
- Use with the verbs *select* and *deselect*, as in *Select the checkbox to enable the option.*
- Don't list the following UI element types unless needed for clarity or navigation: button, checkbox, drop-down button, field, icon, menu, link, radio button, or window. For example, write *Click **Save***, not *Click the **Save** button*.
- In documentation, the text label for a checkbox displays in a monospace font. For example: To send an email to the user, select `Generate new password and notify user immediately`.
- Because a checkbox is a field, follow the guidelines for [Field Names](#) on page 16.
- For checkbox settings on setup pages (which tend to be lengthy), use sentence capitalization.

Cliches

See [Jargon and Cliches](#).

Click

All references to mouse clicks assume that the user has configured the left mouse button as the primary mouse button and the right one as the secondary.

- *Click* means click the left mouse button.
- *Right-click* means click the right mouse button.
- Don't use *click on*: Click **Merge** to finish.
- Don't use *click* when describing gestures users perform in a mobile app with a touchscreen interface. See [Mobile Interfaces and Documentation](#).

Code Samples

When introducing large amounts of code, avoid naming the type of code if possible. For example, don't introduce a code sample written in Java as *this Java* or *the following Java*. When you can't avoid using a term to introduce a code sample, use the following terms, depending on what the sample is:

- Apex script
- Apex class
- Apex trigger
- Visualforce markup

You can also specify the language in a heading, such as Java Sample or C# Sample. Use this in a reference guide when you are presenting more than one version of a program, class, or method.

Using *XML* or *HTML* is acceptable in the context of *The following HTML contains Visualforce markup*.

Use three spaces when indenting code samples when possible. Two spaces may be necessary to conserve space or four spaces to be consistent with Sun, Java, and IDE conventions. Spaces must be consistent within a sample and across a topic.

Compound Words

Most spelling problems involve deciding whether a word or phrase is one word, two words, or one hyphenated word. In many cases the dictionary is the final source for such problems. However, there are many technical phrases that have no definitive answer.

- There are three kinds of compounds: open compounds, hyphenated compounds, and solid (or closed) compounds:
 - Open compounds are words that haven't been joined together: *settlement house* or *lowest common denominator*
 - Hyphenated compounds are words that have been joined by a hyphen: *mass-produced*, *greater-than*
 - Finally, solid or closed compounds are words that have been joined together to form one: *typesetting*, *notebook*
- In English, words usually appear as open compounds first. Over time they evolve into hyphenated compounds, and finally, into closed compounds.
- A compound used as an adjective before a noun should usually be hyphenated to avoid misleading the reader. The phrase a *thin client application*, for example, is ambiguous. Does it refer to a thin application or an application for thin clients? A hyphenated compound adjective, *thin-client*, can clarify, indicating that these two words together modify the noun, *application*. The phrase *thin client* need not be hyphenated when used as a noun. There are other exceptions to this rule, for example, an adverb ending in *ly* is never hyphenated, because ambiguity is impossible: *largely irrelevant rules*.

Contractions

Contractions can be used in documentation and UI text.

- Don't form a contraction from a noun and a verb, as in: Salesforce's going to announce a new product line in the next release.
- Don't form a contraction from a noun and a verb, as in *it'll* or *would've*.

Copyright

Copyright details for the Salesforce Help and PDF files differ slightly.

Salesforce Help

Each Web page produced by Salesforce must include the Salesforce copyright notice at the bottom.



Example: © Copyright 2000–[current year] salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.

PDF Files

Printed documentation and PDF files must display the Salesforce copyright notice on either the title page, on the back of the title page, or in a similar location on the front matter.



Example: © Copyright 2000–[current year] salesforce.com, inc. Salesforce is a registered trademark of salesforce.com, inc., as are other names and marks. Other marks appearing herein may be trademarks of their respective owners.

Customer Support

When referring to customer support for Salesforce, use the company name and capitalize *Customer Support*. For example: Salesforce Customer Support.

Cursor

A *cursor* points to a particular record in a set of records in an API or database context. Less often, it refers to a location on the command line in a developer context.

When referring to the mouse, use *pointer*. See also [Hover](#).

D

Dashes

There are two kinds of dashes: the em dash (—) and the en dash (–). Use no spaces around dashes, except before an attribution for a quotation.

See [Em and En Dashes](#).

Data Types

See [Object and Object Names](#).

Database

Don't capitalize when used as part of a name, unless in a heading or considered part of the proper name.

Prefer *object* to *database table* in UI text and documentation. In most cases, avoid developer-focused terminology.

Datasheet

One word. A datasheet is a single page list of features used to sell a feature, cloud, or other service set.

Dates

- Don't use *st*, *d*, and *th* after numerals in dates to indicate ordinals: April 15, not April 15th.
- Use commas with full dates: On December 14, 2009, the group attended the meeting.
- Use an [en dash](#) with dates: 2004–2010.

Deprecated

Don't use *deprecated* to describe a feature that is available but no longer supported. Use [Not Supported](#).

Desupported

Don't use *desupported* to describe a removed feature. Use *no longer available* instead.

Device

See [Mobile Device](#).

Dialog Boxes

Use *dialog box* to describe a window that contains buttons and other options users can use to perform an action. Don't use *dialog*, *dialog window*, or *dialog popup*.

Use [title-style capitalization](#) for dialog box names: The Save As dialog box lets you decide where to save a record.

Compare to [Overlay](#) and [Popup Windows](#).

Directional Words

Don't use directional words in

- UI text to describe the location of an element on an application page
- Documentation to describe the location of an item in a section

See [Below](#) and [Above](#).

Disabled

- Unavailable—Use for a menu item, drop-down list option, or other selection that is currently unusable: Some options may be unavailable depending on your license type.
- Disable—Use to describe the act of making something unavailable: Select `Disable` to disable task alerts.
- Disabled—Use for a feature that is not enabled: Email-to-Case is disabled on sandbox.

Display, View

Use *display* to describe what a Web browser or the app does. Use *view* to describe what a user does. For example:

- Choose which related lists will display on your detail pages.
- You can view related items in related lists.

Drag-and-Drop

Use as an adjective, not a verb or noun. For example: Drag-and-drop editing, a drag-and-drop feature.

Use *drag* by itself as a verb. The action of dragging includes dropping the item in place. For example: Drag the item to another day of the week.

See also [Mouse Terminology](#).

Drop-Down Buttons

A button that expands to show more than one option.

In general, use the format *Click X and Select Y*: Click **Create New Approval Process** and select **Use Standard Setup Wizard**.

Don't list the following UI element types unless needed for clarity or navigation: button, checkbox, drop-down button, field, icon, menu, link, radio button, or window. For example, write *Click **Save***, not *Click the **Save** button*.

Drop-Down Lists

- If the drop-down list is a [picklist](#) field—that is, a field in a Salesforce object—follow the guidelines for [field names](#).
- If the drop-down list isn't a field in an object but simply a user interface widget, don't use any special font when referring to it. For example: To edit or delete any list view you created, click **Edit** next to the View drop-down list.
- Don't use quotation marks or any special formatting for drop-down list names.
- If you're instructing the user to select something or enter a value, tag the value as `<userinput>`. Otherwise, for values such as field defaults or acceptable values, use `<codeph>`. Don't use quotation marks for these values.

E

Earlier

Use instead of *lower* or [below](#) to describe product version numbers, as in *Internet Explorer 6.0 and earlier*.

Editions

- Don't use *the* when referring to an edition: Enterprise Edition is for large organizations.
- Include edition names in bold text in edition tables. For example: **Enterprise** Edition.
- Include Edition and User Permission tables in task topics.
- Order editions in edition tables as follows: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, Developer.
- Always capitalize both words in an edition name, as in Enterprise Edition and Group Edition. Don't capitalize *edition* when it appears by itself as a common noun: Accounts are available in all editions.

e.g.

Don't use in documentation. Instead, use [for example](#).

Elements

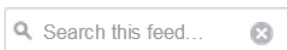
Don't capitalize when used as part of a name, unless in a heading or considered part of the proper name:

- database
- field
- file
- process
- program

- record
- report
- screen
- segment
- subtab
- tab

Ellipses (...)

- Use an ellipsis in ghost text to indicate that users can take action. Unless the ghost text ends with a question mark, end with an ellipsis.



- For loading animations, use a one-word, visible label that expresses the operation in progress, in the user's language. End with an ellipsis. For example: Saving...
- In a quoted passage, use an ellipsis to indicate any omission of text.

Em and En Dashes

The en dash is half the length of an em dash and a little longer than a hyphen (-).

Em Dash

Don't add a space on either side of the em dash. Use an em dash to

- Introduce an element added to give emphasis or explanation by expanding a phrase in the main clause of a sentence: These users have the same access to your data as you do—they have access to all data you own or that has been shared with you.
- Indicate a bigger break in thought than that represented by a comma.
- Define or enumerate complementary elements that are added to or inserted in a sentence: If you use the template for any other email alert action—in either workflow rules or approval processes—the merge fields return a null value.
- Separate pronoun referents from the subject of a final, summarizing clause: Latin, Cajun French, and UNIX—these are the languages she most admires.

En Dash

Use the en dash to indicate a minus symbol or ranges for numbers, dates, and time. Don't add a space on either side of the en dash. For example:

- 1981–87
- pages 38–45
- –24

Use a [hyphen](#) instead of an en dash in compound words like drop-down.

Email

Use *email*, not *e-mail*, *E-mail*, or *E-mails*. Use *emails* as the plural. Acceptable for use as a noun or verb.

End Punctuation

Refer to user interface elements using the element's exact label (including any end punctuation, such as an ellipsis). For example: Click **Add...** to browse for files on your local computer.

Etc.

Don't use in documentation or UI text. Rephrase to provide more specific information.

Examples

When adding an inline example, introduce it with *for example*. Don't use *e.g.*, *i.e.*, or *example*:

Correct

- For some organizations whose instances migrated (for example, from na7.salesforce.com to na10.salesforce.com), fixed an issue that prevented users from logging into Salesforce for Outlook successfully.
- For example, if a customer reports a problem that you can't solve during the chat, create a new case for the customer.

F

Fewer, Less

Less refers to quantity while *fewer* refers to number. For example:

- We recommend fewer than five filters.
- Smaller organizations receive less than 1 GB of storage.

Be aware of your meaning. The sentence *I have less problems than they* means my problems aren't as big, whereas *fewer problems* would mean that mine aren't as numerous.

Field

- Use [title-style capitalization](#) for field names. Don't capitalize *field* when it is part of a name, unless it's in a heading or considered part of the proper name.
- When referring to fields in relation to objects, use *on* instead of *in*.
- If you're instructing the user to select something or enter a value, tag the value as `<userinput>`. Otherwise, for values such as field defaults or acceptable values, use `<codeph>`. Don't use quotation marks for these values.



Example: When you create a custom field on a standard object, add the custom field to your package explicitly.

Field Names

For topics that list all of the fields in a detail page, use the following standardized text: “An *object name* has the following fields, listed in alphabetical order.” If it includes fields that can be hidden in page layouts or field-level security, include the following standardized text: “Depending on your page layout and field-level security settings, some fields may not be visible or editable.”

Labels

Use the element’s exact label when you refer to user interface elements, but remove any end punctuation, such as an ellipsis. Retain any punctuation that’s not at the end of the label.



Example: Click **Add...** to browse for files on your local computer.

Capitalization

Use [title-style capitalization](#) for field names. Don't capitalize *field* when it is part of a name, unless it's in a heading or considered part of the proper name.



Example: Import your data into the `Lead Source` field.

Formatting

- In documentation, field names display in a monospace font.
- In user interface text, don't use special formatting when referring to field names.
- When listing fields with descriptions, use a table. Don't use a bullet list or definition list.

Custom Fields

When referring to a custom field that you recommend users create, use the same style conventions as when referring to a standard Salesforce field.

Prepositions

When referring to fields in relation to objects, use *on* instead of *in*.



Example: When you create a custom field on a standard object, add the custom field to your package explicitly.

File

Don't capitalize when used as part of a name, unless in a heading or considered part of the proper name.

File Names and Extensions

Use the following style guidelines for file names and file extensions.

- For file, directory, and drive names, use the exact spelling and capitalization used in the program or file itself.
- Use all lowercase for file extensions. For example, Word adds `.docx` to a file name if you neglect to specify the file format when saving. Refer to the [Microsoft Manual of Style for Technical Publications](#).

- If you can't avoid using the file extension to describe the file, precede the extension with a period; for example, "a .zip file."
 - If the extension displays within a sentence, use lowercase; for example, "A .txt file that is renamed to .rtf is not searched."
 - If the extension displays within a heading, use [title case](#); for example, "Renaming .Txt Files."

For more information, see [Microsoft Manual of Style for Technical Publications](#).

- *File name* is always two words.

File Types

For file, directory, and drive names, use the exact spelling and capitalization used in the program or file itself.

Use all lowercase for file extensions. For example, Word adds `.docx` to a file name if you neglect to specify the file format when saving.

Refer to the [Microsoft Manual of Style for Technical Publications](#).

Filter Criteria Examples

In documentation, filter criteria examples display in a monospaced font, as in: Enter the following filter criteria: *Current User: Office Location Equals Headquarters.*

In UI text, use a monospaced font to refer to filter examples: *Current User: Office Location Equals Headquarters.*

First Person

Don't use *I*.

We is acceptable: We recommend that the file size be under 50 KB.

See also [Second Person](#), [Third Person](#).

Folder Names

Don't use quotation marks or any special formatting for folder names. Use the folder name exactly as it appears in the user interface.

Following

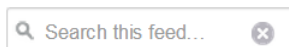
Don't use in UI text to describe the location of an element on an application page.

Avoid using in documentation to describe the location of an element, for example, "The following table" or "The following diagram." Instead, refer to the element directly, for example, "This table" or "The diagram." If necessary, use *later* or *following* instead of *below* to indicate upcoming information in documentation.

G

Ghost Text

User interface text in a field that provides guidance for input. Ghost text is replaced by user input when the user types.

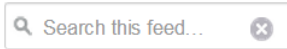


Capitalization

Use [sentence caps](#) for ghost text, unless the text includes a reference to a UI element or other proper noun.

Ellipses

Use an ellipsis in ghost text to indicate that users can take action. Unless the ghost text ends with a question mark, end with an ellipsis.



See Also

- [Capitalization](#)
- [Ellipses \(...\)](#)

H

Hard Code, Hard-Coded, Hard Coding

Two words as a verb or noun; hyphenated as an adjective.

Hard coding refers to the software development practice of embedding output or configuration data directly into the source code of a program. For example:

- The developer hard coded the error messages for the program.
- Hard-coded strings are a bad idea.

He/She

Don't use.

Hover

Use *hover* instead of *mouse over* to describe moving the mouse pointer over an icon, field, or button. Write *hover over* instead of *hover your mouse pointer over*

Hover Text

In UI text, avoid putting all instructions at the top of the page. Divide dense instructions and place them next to the corresponding user interface elements or in field-level help hover text.

Hyphens

- Use hyphens to create [compound words](#).
- Be consistent with which words you hyphenate.
- The following prefixes normally don't require a hyphen: ante, anti, bi, bio, co, counter, extra, infra, inter, intra, macro, mid, mini, multi, non, over, post (after), pre, pro, pseudo, re, semi, sub, super, supra, trans, ultra, un, under.

- Exception: when a prefix stands alone, it carries a hyphen (over- and underused).
- Other exceptions: the prefix carries a hyphen if the second element is a capitalized word or numeral (un-American, pre-1914) or the compound is a homonym (re-create means to create again, recreate means to take recreation).
- When the prefix ends with a vowel and the root begins with a vowel, such as pre-existing, hyphenate.
- When a measurement is used as an adjective, use a hyphen to connect the number to the measurement, as in *10-point type*. Otherwise, don't use a hyphen.
- Hyphenate a fraction written as words: *Three-fifths*, *Four and one half*.
- Hyphenate a two-element number under 100: *Sixty-three*, *twenty-one*.
- Don't add a hyphen before *text* in Rich Text Area or Long Text Area.
- When alphabetizing terms, start with spaces and hyphens, followed by numbers, followed by letters. Always treat a hyphen as a space. For example:
 - W2L
 - Web Tab
 - Web-to-Lead
 - Web2Lead
- Use an [en dash](#) (–) instead of a hyphen to indicate ranges, such as 1991–2010.

I

i.e., That Is

Don't use i.e. Try to rewrite your sentence or use *that is*. For example: *Remember to map custom lead fields to other custom fields of the same data type, such as mapping numeric lead fields to other numeric fields.*

Enclose an expression, such as *that is* or *namely*, and the element it introduces in parentheses only if a comma doesn't signal a big enough break in continuity:

Imperatives

- In help documentation, use imperatives whenever possible. In UI text and both user and developer documentation, *you* or the imperative is almost always appropriate in procedures, since the person reading the documentation is usually the same person trying to perform the task.
- Always use imperatives in task topic titles.

Install, Installation

Use *install* only as a verb, never as a noun.



Example:

Correct

Install the software on your computer.

Correct

Finish the installation before you proceed.

Incorrect

Finish the install before you proceed.

Internet

Do not capitalize internet when it is used as an adjective, but capitalize Internet as a noun (that is, if you refer to the Internet).

Example

- internet banking
- internet radio
- the Internet

Introductions

Don't add an introductory phrase (also known as a *stem*) to a task or table that appears soon after a topic's title. For example, a set of steps that immediately follows the title *Editing a File* does not need the introductory phrase "To edit a file:". If you include only essential introductory content in a task, you'll never need a stem.

iOS

One word. Capitalize only the *O* and *S*.

iOS is the name of the operating system that runs on Apple's line of mobile devices: iPad and iPhone. When specifying a version of iOS, append the version number but don't include the word *version*: iOS 5.0.

iPad and iPhone

iPad: One word. Capitalize only the *P*.

iPhone: One word. Capitalize only the *P*.

Avoid pluralizing the names of Apple's mobile products:

Wrong:

iPads and iPhones.

Right:

iPad and iPhone devices.

Wrong:

The Chatter mobile app can run on iPads with iOS 5.0 or higher.

Right:

The Chatter mobile app can run on your iPad if it has iOS 5.0 or higher.

Italics

- Use italics for emphasis, but don't overdo it.
- Avoid using italics in on-screen text, as italic text is hard to read.

- In documentation, use italics for specific references to the titles of manuals, books, magazines, disks, videotapes, films, audiotapes, catalogs, bulletins, and promotional literature.

J

Jargon and Cliches

Avoid jargon and cliches, which are words and phrases that have become trite and ineffective through overuse. Here are some examples:

- Cutting edge
- Ease of use
- General-purpose
- Grow your business
- Hands-on
- Innovative
- Intuitively
- Leverage (as a verb)
- Paradigm
- Powerful feature
- State-of-the-art
- Robust
- User-friendly
- Total solution

Try to find words that convey your idea more effectively.

- Translate technical jargon into simple words whenever you can. Even when the reader is highly skilled, plain English may still do the best job of communicating. When you cannot use simple words, define or explain them.
- If technical terms are appropriate and necessary for your audience and purpose, make sure they're defined clearly and used consistently.

JavaScript

One word. Capitalize the J and S.

Job Titles

Capitalize the first letter of each major word of a formal title only if it refers to a proper name. For example: Kevin Lawrence, VP of IT Development, attended the meeting.

In running text, use lowercase when you name a formal title without a person's name, when you set off the person's name with commas, or you're describing general duties or responsibilities. For example: The project lead will be assigned next week.

K

Keyboard and Key Names

- Don't format key names in bold.
- Use title capitalization for key names, as in *Alt* or *Right Arrow*.
- Use the verb *Press* instead of *Click* or *Hit*, as in *Press Ctrl*.
- Use a plus sign, as in *Ctrl+P*, to indicate key combinations.
- Don't include a space before or after the plus sign.
- Use the term *shortcut* instead of *command* to refer to a keyboard shortcut.

L

Later

Use *later* instead of *above*, as in *Internet Explorer 7.0 and later*.

If necessary, use *later* or *following* instead of *below* to indicate upcoming information (*later in this guide*).

Latin Abbreviations

Don't use. Rephrase your sentence or use an English equivalent.

Use This	Not This
and others	et. al.
and so on	etc.
for example	e.g.
namely	iz.
that is	i.e.
in other words	

Less

See [Fewer, Less](#).

Links

- In UI text, don't use any special formatting when referring to link text.
- Capitalize link text based on context. For example, if link text includes an element that is capitalized in the UI, capitalize it in the link text too.

- Don't list the following UI element types unless needed for clarity or navigation: button, checkbox, drop-down list, field, icon, menu, link, radio button, or window. For example, write *Click **Save***, not *Click the **Save** button*

List Views

Don't use any special formatting for list view labels.

Lists

Lists organize categories of information or highlight important elements. Run-in lists present a series of enumerated items in running text; displayed lists present bulleted or ordered items on separate lines for greater visual effect and readability. Bulleted lists are best used to highlight items that may appear in any order; ordered lists indicate priority ranking or sequencing.

- Introduce a displayed list with the beginning of a sentence followed by a colon. If the introduction is a complete sentence, end it with a period, of course.

Example

The available objects are:

- Accounts
- Opportunities
- Quotes

If errors are preventing you from adding one or more Data.com records to Salesforce, we'll provide a .csv error log file. How we provide the error log depends on what you were trying to do.

- If you were trying to add fewer than 200 records, you'll see a message with a link to the error log on the Files tab.
- If you were trying to add 200 records or more, you'll receive an email with a link to the error log on the Files tab.
- If you were trying to add any number of records and you do not have Chatter enabled, you'll receive an email with the error log attached.

- Keep items in a series, list, or table parallel. Don't mix fragments and full sentences.
- When introducing a list, don't refer to the number of items in that list. Doing so could cause errors if list items are added or deleted.
- Use an initial cap for the initial word of each line item, whether a fragment or a full sentence.
- Omit the period after items in a bulleted or other type of list only if the items are fragments rather than complete sentences. However, a period is necessary at the end of a sentence whenever more than one sentence exists for that bullet. In this case, make all bullets complete sentences that end in periods so that each bullet is parallel.
- Focus on users' tasks; write only what is necessary for users to complete them.
- Keep tasks short.

Localization

The process of adapting the product to a particular language, culture, and desired local look and feel.

Ensure your content and user interface text is easily localizable and is grammatically correct.

Avoid object names in text whenever possible

But never sacrifice usability!

If you use object names, avoid complex grammar

Try to make the object name the subject of the sentence, which helps translators modify sentences while keeping phrases with renamed objects grammatically correct. For example:

- **Avoid:** Companies you do business with are called *accounts*.
- **Better:** *Accounts* are the companies you do business with.

Be specific

If possible, use the specific name of the record. For example:

- **Avoid:** This page lists the sharing for this opportunity.
- **Better:** Here is the sharing for **My Big Opp**.

Use *record* or *object* as a generic term if you can rather than the standard name of the object. For example:

- **Avoid:** The sharing setting for this opportunity is private.
- **Better:** This record's sharing setting is private.

Use whole text strings

In the user interface text label files, avoid composing strings from multiple substrings. Use complete sentences or phrases to avoid ambiguity for the translator.

Avoid user input elements within sentences

Avoid using input elements, the values they contain, or their unit label to create a sentence or phrase. Such a design isn't localizable because sentence structure varies with language.

- **Avoid:** Allow the _____ domain to send emails using Apex Email Services.
- **Better:** Allow this domain to send emails using Apex Email Services: _____

Location Words

Don't use below, following, above, or other such words to refer to the placement of user interface elements on a page.

Login, Log In

Login is a noun and *log in* is a verb. For example:

- Log in to Google Apps.
- Enter your username and password on the login page.

Don't use *sign in* or *sign on*. Hyphenate *sign-on* when referring to the single sign-on feature.

M

Mathematical Terms

Don't pluralize single letters, symbols, or mathematical signs by adding an apostrophe and an *s*.

- **Incorrect:** Salesforce replaces unrecognizable characters with @'s.
- **Correct:** Salesforce replaces unrecognizable characters with the at (@) sign.

When referring to a symbol, spell out the name of the symbol and then enter the symbol in parentheses after it.

- When using an equal (=) sign, add one space on each side.

- Wrap greater-than (>) and less-than (<) signs in parentheses rather than quotation marks.

Measurements

Measurements include distance, temperature, volume, size, weight, points, and picas, but generally not units of time.

- Use numerals for all measurements. This applies even if the number is under 10, as in *5 inches*.
- Repeat the unit of measure for two or more quantities. Between 32 KB and 100 KB.
- It's acceptable to abbreviate measurements, as in KB and GHz, if the abbreviations are common to the audience.
- In abbreviations for measurements, don't add an s to indicate plurality. For example: 10 oz or 30 mm
- When a measurement is used as an adjective, use a hyphen to connect the number to the measurement, as in *10-point type*. Otherwise, don't use a hyphen.
- Don't use periods with abbreviations for units of measure. If the abbreviation forms a word, such as *in* as an abbreviation for inches, spell out the word in text to avoid confusing the reader. Confine use of the abbreviation to tabular matter and other condensed copy.

@Mention

An @mention is the @ symbol followed by the name of a person or group, for example, **@Maria Sanchez** or **@DocTeam**. @Mentions are used in Chatter posts and comments to tag people and groups. When you @mention a user or group, your post appears in their feed, and the @mention links to their profile.

Capitalization

Capitalize **@mention** as you would other words. Use uppercase if it's the first word in a sentence or part of a title. Otherwise, use lowercase.

Example:

- @Mention users when sharing a file with groups.
- In the **Comments** field, @mention users and groups.

Context

You can use **@Mention** as a verb or a noun, as well as in plural form.

Example:

- @Mentioned people receive email notifications of your post.
- In your comment, @mention any users you want to notify.
- The @mention links to the person's profile.

Menu Options

- In documentation, use bold font and a symbol, such as a bracket (>), to display menu option selections or sequences of user interface clicks. For example, **File > Print** indicates that a user selects the **Print** option from the **File** menu.
- Don't list the following UI element types unless needed for clarity or navigation: button, checkbox, drop-down button, field, icon, menu, link, radio button, or window. For example, write *Click **Save***, not *Click the **Save** button*.

- In UI text, provide a direct link to a described page instead of a sequence of menu options. If that's not possible, use the same style convention as documentation.
- Use [title-style capitalization](#).

Message

In message headers, use [title-style capitalization](#) and ending punctuation.

In the message details, use [sentence-style capitalization](#) and ending punctuation.

Mobile Device

Use *mobile device* when referring generally to handheld computing devices—and not specifically to a type of Android, Apple, or BlackBerry device—because the term can include both smartphones and tablets. (Example: The Chatter mobile app lets you collaborate in Chatter from your mobile device.)

After first mention in a topic, just use *device*.

Mobile Interfaces and Documentation

- [Types of Mobile Interfaces and Operating Systems](#)
- [Touchscreen Gestures \(Android, iOS, and Windows\)](#)
- [Other Terminology for Individual Mobile Operating Systems](#)
- [Mobile-Related Style Guide Entries](#)

Types of Mobile Interfaces and Operating Systems

The user interface for a mobile device is different from a computer user interface, so don't use mouse terminology when writing mobile user assistance (see [Mouse Terminology](#)). Users interact with Salesforce mobile apps on different devices using touchscreens.

Touchscreen


An electronic visual display that detects the presence and location of contact with its surface, so that users can manipulate a device's interface by touching the surface with a finger or stylus. Many popular mobile touchscreen devices are equipped with multi-touch technology, which means the touchscreen can recognize the presence of two or more points of contact.

The mobile apps developed by Salesforce currently run on iOS, Android, and Windows operating systems.

Operating System	Interface
Android	All Salesforce apps for Android are designed for touchscreen devices.
iOS	All iOS devices have a touchscreen interface.
Windows	All Salesforce apps for Windows are designed for touchscreen devices.

Touchscreen Gestures (Android, iOS, and Windows)

Use the following terms when you refer to touchscreen device functionality.

Gesture	Description and Examples
Tap	<p>A gesture for pressing or selecting an element on a touchscreen device (analogous to a single click in a desktop application). To tap, users lightly strike the screen with one finger. Examples:</p> <ul style="list-style-type: none"> • To edit the task, tap . • Tap an item in the list to view its details in the detail pane.
Double-tap	<p>A gesture typically used to zoom in or out of text or an image. A double-tap consists of two quick taps (analogous to a double-click in a desktop application). Always hyphenate double-tap. Example:</p> <ul style="list-style-type: none"> • Select the text, then double-tap the selection to open the shortcut menu.
Touch and hold	<p>A gesture used to display an information bubble, magnify content under the finger, or perform specific interactions in applications. To touch and hold, users touch the screen, leaving their finger motionless until the information is displayed or the action occurs. <i>Don't hyphenate.</i> Example:</p> <ul style="list-style-type: none"> • To delete the app, touch and hold the Dashboards icon, then tap the red icon.
Drag	<p>A user gesture typically used to scroll, pan, move the view, or move an object. To drag, users place a finger on the screen and move it in the desired direction without lifting it from the screen. Example:</p> <ul style="list-style-type: none"> • To add an item to your Favorites, touch and hold the icon next to a person, group, or record until the icon changes color, then drag it to the Favorites section.
Flick	<p>A user gesture used to scroll or pan quickly. To flick, users place a finger on the screen and quickly fling it in the desired direction.</p> <p>Flick implies a less controlled motion than swipe and is best used to describe fast-paced scanning. Example:</p> <ul style="list-style-type: none"> • Flick to scroll quickly through a long list.
Swipe	<p>A user gesture typically used to interact with UI elements like pages and panels, reveal context-sensitive options and menus, and scroll at medium speed. To swipe, users place a finger on the screen and move it in the desired direction, lifting the finger from the screen toward the end of the movement. Example:</p> <ul style="list-style-type: none"> • To close the comments panel, swipe it away.
Pinch	<p>A two-finger user gesture used to zoom out. To pinch, users place the thumb and a finger (or two fingers) a little distance apart on the screen and move them together without lifting them from the screen. Example:</p>

Gesture	Description and Examples
	<ul style="list-style-type: none"> When viewing an image, you can pinch to zoom in or out. <p>See also Spread.</p>
Spread	<p>A two-finger user gesture used to zoom in. To spread, users place the thumb and a finger (or two fingers) close together on the screen and spread them apart without lifting them from the screen.</p> <p>Touch doesn't currently support spreading.</p> <p>See also Pinch.</p>

Other Terminology for Individual Mobile Operating Systems

Although Android, iOS, and Windows devices have similar features, the terminology usually differs.

For example, the notification manager in iOS is called *Notification Center*, but in Android its called *notifications list*. When possible, use hardware and software terminology consistent with the operating system the mobile app runs on.

Refer to the manufacturer's human interface guidelines and device user guides for the most current terminology.

Android documentation

developer.android.com/develop/index.html

Android design guidelines

developer.android.com/design/index.html

Apple documentation

support.apple.com/manuals/

iOS human interface guidelines

developer.apple.com/library/ios/#documentation/UserExperience/Conceptual/MobileHIG/Introduction/Introduction.html

Mobile-Related Style Guide Entries

These entries in the style guide include more details on mobile-related style:

- Buttons
- Cellular
- iOS
- iPad and iPhone
- Message
- Mobile Device
- Operating System and OS
- Page
- Press
- Touchscreen
- Trademarks, Registered Trademarks
- Wi-Fi

Mouse Terminology

- *Click* means click the left mouse button.
- *Right-click* means click the right mouse button.
- Don't use *click on*: Click **Merge** to finish.
- When referring to the mouse, use *pointer*.
- Use *drag* by itself as a verb. The action of dragging includes dropping the item in place. For example: Drag the item to another day of the week.
- Use *hover* instead of *mouse over* to describe moving the mouse pointer over an icon, field, or button. Write *hover over* instead of *hover your mouse pointer over*.
- Don't use mouse terminology when describing actions users perform in a mobile app. See [Mobile Interfaces and Documentation](#) on page 26.

Multitenant

One word.

Refers to the architectural principle where a single instance of the software runs on a vendor's servers. All users log in to that same instance, instead of maintaining separate software instances for individual users. Multitenant applications are designed so that users share the same physical instance and version of the application.

N

Negatives

Whenever possible, phrase sentences positively rather than negatively.

Negative

The mini view doesn't display if the record in the detail view doesn't have any records associated with it.

Positive

The mini view only displays if the record in the detail view has records associated with it.

Nonbreaking Spaces

Avoid if possible by rephrasing your content. Nonbreaking spaces cause a variety of problems:

- **Bad line breaks** — Words separated with nonbreaking spaces are treated as single words when the text is wrapped, resulting in unintended line breaks.
- **Programming errors** — Don't use nonbreaking spaces in sample code. Most compilers treat nonbreaking spaces as invalid characters.
- **Debugging difficulties** — Nonbreaking spaces look the same as regular spaces in most code and text, making them hard to spot.

Not Supported

Use *not supported* to describe a feature that is available but doesn't have any associated help, and is used at the user's own risk.

Notes

- Use notes sparingly so that they remain attention-getters.
- Topics cluttered with notes indicate a need to reorganize information.
- Use only one note per topic if possible. Otherwise, space notes out appropriately.
- Tips for avoiding multiple notes of any type per topic:
 - Combine notes into one with separate paragraphs.
 - Create a new section entitled *Tips on X* and include the information as bullets in a list. For an example, see “Enable the Customer Portal for Contacts and Person Accounts” in the Salesforce Help.

Null

When using *null*, mention whether you're referring to the concept of empty or the literal value null.

Numbers

- Spell out numbers:
 - At the beginning of a sentence: Twenty-five people were part of the development team.
 - If the number is fewer than 10: Of the seven systems, the administrator backed up six daily. This rule applies unless the number precedes a unit of measure.
 - When depicting *approximate* numerals in hundreds or thousands: The managed forest contained about six thousand trees.
- Use numerals:
 - For numbers 10 or greater.
 - For *approximate* numbers above 999,999, use the numeral followed by x “million” or the appropriate word instead of all the zeros: The solar system is estimated to be about 4.5 billion years old.
 - For *specific* round numbers, such as 34,000 and 200,000, use the full numeral, including the zeros. Don't use “thousand”: Custom views display only the most recent 200,000 rows from the filtered data set.
 - For units of measure, including angles, areas, lengths, money, percentages, time (including years, months, weeks, and days), and volume. This applies even if the number is under 10, as in *5 inches*.
 - In a group of two or more numbers when at least one of the numbers is 10 or more: The program reports 17 errors, 9 major and 8 minor.
 - To identify an object by number: bits 0 and 1.
 - For decimals: 3.4, 16.7.
 - For fractions in a unit of measure or in a mixed number: (1/2-inch measure, 4 1/2 times as much).
 - If a number precedes an abbreviation or symbol: 14%, 30+ mpg.
- Don't use abbreviations like *K* for thousand; or *M* or *MM* for million.
- If two numbers are adjacent, spell out one: *four 8-character* form entries; *thirty-two 8-bit* bytes.
- To form the plural of a numeral, add *s* but no apostrophe: Type three 2s.
- When a measurement is used as an adjective, use a hyphen to connect the number to the measurement, as in *10-point type*. Otherwise, don't use a hyphen.
- Hyphenate a fraction written as words: *Three-fifths*, *Four and one half*.
- Hyphenate a two-element number under 100: *Sixty-three*, *twenty-one*.

- Don't use *st*, *d*, and *th* after numerals in dates to indicate ordinals: April 15, not April 15th.
- Don't use both a numeral and a word for the same number in a sentence, as in *six (6)*. One or the other is enough: The document is in six files.
- Always spell out the word *number* in text. Where space is tight, as in tables, it's okay to use the abbreviation *no.* instead.
- For numbers with four or more digits, use commas between groups of three digits, for example, 1,000 emails per user.
- In UI text, some features, such as dashboards and feeds, do include abbreviations of large numbers (in the thousands or bigger).

O

Object and Object Names

Don't change the capitalization of objects, methods, calls, or other language constructs, such as the Account object or `create()`. Consider rewriting a sentence so that a lowercase element is not the first word. However, headings in reference documentation often contain elements, and the elements must retain their case. Use sentence case in tables, if the table heading is a complete sentence or partial introduction to a sentence, as in some FAQ tables.

Objects, such as account and opportunity, or data types, such as Lookup and Text Area, receive no special formatting. They follow different capitalization guidelines depending on their context:

- **Code:** When referring to a code context such as in the API or Apex, use the capitalization found in the code itself. The names of objects and data types are capitalized in Apex documents, but are lowercase in API documents to reflect the actual values in the Apex code or the API WSDL (Web Services Description Language), respectively. For example: (API) *Every custom field has a boolean data type.* (Apex) *Ensure that the Boolean condition remains `true`.*

In most cases, it's not important to the general user whether you're referring to the object or record (instance). Use your best judgment and clarify when necessary.

Object Manager

The Object Manager is a streamlined tool that lets admins access object management settings for both standard and custom objects. Object management settings include customizations like fields, page layouts, and compact layouts. The Object Manager is available only in Lightning Experience. When referring to the Object Manager, use:

- The article "the"
- Title-style capitalization

Operating System and OS

Spell out *operating system* except when you refer to Mac OS X and iOS, because those are the names of the operating systems that run on Apple devices. Google, Apple, and Research in Motion (RIM) have branding guidelines and preferred language for describing releases of their operating systems:

Android

Use the word *release*—not *version* or *OS*—followed by the release number. The word *release* is lowercase. Example: Android release 3.0.

Apple

Use the trademarked name of the Apple operating system followed by the version number. Example: iOS 5.0.

BlackBerry

Don't include *version* or *OS* before a version number. Example: BlackBerry 7.

Optional Steps

When presenting steps that aren't required for the user to complete the procedure, use one of the following conventions based on context, conciseness, and relevance to the task.

Conditional *If* Phrase

Use a conditional *if* phrase to specify the conditions that make the step relevant. For example:

- If you're editing picklist values, select the name of the picklist field.
- If you need to filter on the name for a person account, use the `First Name` or `Last Name` fields instead.
- If needed, you can force the expiration of passwords for all users.

Note for Optional Steps

Use a note for information that isn't critical for most users. The note can appear after a step or at the end of the procedure, depending on relevance and the number of notes already in the topic. It can include more than one optional step, but consider using a separate Tip section for multiple entries.

Org, Organization

Use *Salesforce org*. If you're using the phrase more than a few times in a topic, OK to shorten to *org* where needed. Don't use *organization*.

Overlay

Use *overlay* to describe a custom layer that partially or entirely obscures underlying content on a page. For example: "Hover over the subject of a task to see the details of the task in an overlay."

Use [title-style capitalization](#) for overlay titles.

Compare to [Dialog Boxes](#) and [Popup Windows](#).

Overview Topics

An overview is a topic focused entirely on conceptual information. Use the format: <X> Overview. For example: Cases Overview. Don't use Managing <X>, Working with <X>, What is <X>?, or About <X>. Overview topics don't need user permission tables.

P

Page

Use an [en dash](#) with page numbers, as in *pages 38–45*.

Use [title-style capitalization](#) for UI pages, related lists, and screen names. In documentation, use the page name exactly as it appears on the screen.

Use *page* instead of *screen* to refer to the user interface. Exception: For mobile interfaces, use OS-specific terminology if it applies. For example, in iOS, the main page is called *home screen*.

Paragraphs

Be concise

- Don't add text if it's not needed.
- Use as few words as possible.
- Focus on users' tasks; write only what is necessary for users to complete them.
- Avoid unnecessary and redundant information.
- Keep tasks short.

Design text for easy scanning

- Users often scan, rather than read, text, so design the information for scanning.
- Place the most important points first and then add supplemental information if necessary.
- If you have multiple pieces of information to convey, use bulleted lists for easier scanning.
- Users read actionable text before explanatory text, so place actions first and then add explanations if necessary.
- Assume that once users have decided what to do, they immediately stop reading and do it.
- Use *See Also* links at the end of topics to refer users to related information. Avoid inline links whenever possible.

Avoid large blocks of text

- Keep only one topic per paragraph.
- Avoid long, complex sentences. Write so readers only have to read the sentence once.
- Keep your average sentence length less than 17 words.
- Make smooth transitions, using words and phrases such as also, in addition, moreover, consequently, however, although, for example, next, first, finally, and in contrast.
- In running text, generally avoid a string of one-sentence paragraphs.

Parallel Construction

- Use the same grammatical form for words or phrases in lists, titles, headings, or any other group of items that are related in grammatical structure or function.
- For [titles](#), headlines, and headings, be consistent with equivalent headings throughout; that is, use nouns, noun and gerund phrases, or questions.
- Keep items in a series, list, or table parallel. Don't mix fragments and full sentences.
- Keep elements within a sentence parallel.

Parentheses

In standard sentences, avoid enclosing text in parentheses. It breaks up the sentence and can be hard to follow. Instead, try to rephrase the sentence or use commas for closely related material and dashes for less related material.

- Enclose an expression, such as *that is* or *namely*, and the element it introduces in parentheses only if a comma doesn't signal a big enough break in continuity:
 - The task has been closed, that is, the `status` field has a “Closed” value.
 - 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.
- Don't use parentheses within parentheses. Instead, rephrase; if necessary, change the second set to brackets.

- Watch for misplaced parentheses, or an opening or closing parenthesis that lacks a partner.
- When referring to a symbol, spell out the name of the symbol and then enter the symbol in parentheses after it. For example:
 - When using an equal (=) sign, add one space on each side.
 - Wrap greater-than (>) and less-than (<) signs in parentheses rather than quotation marks.
- Use brackets to set off information already within parentheses.
- Place semicolons and colons outside quotation marks and parentheses.
- Place question marks or exclamation marks inside quotation marks, parentheses, or brackets only when they're part of the quoted or parenthetical matter.
- When parentheses or brackets enclose an independent sentence, place the period or comma inside. Otherwise, place the period or comma outside.

Passive Voice

Changing the passive voice to active usually makes a sentence clearer and less wordy. Passive voice can be appropriate in some cases. See [Voice](#).

Past Tense

Use present tense whenever possible.

PDF

Always capitalize. Add a lower-case *s* to make plural: PDFs.

Periods

Follow these guidelines for periods.

Acronyms and Abbreviations

- Don't use periods with most acronyms or abbreviations for technical terms, standard nontechnical abbreviations, or abbreviations for units of measure:
 - ANSI (acronym)
 - MB (technical abbreviation)
 - PhD (nontechnical abbreviation)
 - ft (unit of measure)
- If the abbreviation forms a word, such as *in* as an abbreviation for inches, spell out the word in text to avoid confusing the reader. Confine use of the abbreviation to tabular matter and other condensed copy.
- For time values in a twelve-hour system, use AM/PM preceded by a space. For example, 10:30 PM. Don't use a.m., p.m., A.M., P.M., am, or pm.

With Other Punctuation

- When the quoted material is at the end of the sentence or in a series, including the period or comma in quotation marks can confuse the user. In this case, reword the sentence. If this isn't possible, place the period or comma outside the quotation marks.
- When parentheses or brackets enclose an independent sentence, place the period or comma inside. Otherwise, place the period or comma outside.
- Omit the period after items in a bulleted or other type of list only if the items are fragments rather than complete sentences. However, a period is necessary at the end of a sentence whenever more than one sentence exists for that bullet. In this case, make all bullets complete sentences that end in periods so that each bullet is parallel.

Phone

On first mention in a topic, use *smartphone* instead. On subsequent mentions, OK to use *phone*.

Picklists

Picklist

Selection list of options available for specific fields in a Salesforce object, for example, the `Industry` field for accounts. Users can choose a single value from a list of options rather than make an entry directly in the field.

Multi-Select Picklist

Selection list of options available for specific fields in a Salesforce object. Multi-select picklists allow users to choose one or more values. Users can choose a value by double clicking on it, or choose additional values from a scrolling list by holding down the CTRL key while clicking a value and using the arrow icon to move them to the selected box

Master Picklist

A complete list of picklist values available for a record type or business process

Please

Avoid *please* except when prompting the user to do something inconvenient or when the system is to blame for the situation. For example: *The export process can take some time. Please wait until the process completes*

Plug-in

A component that helps browsers support the file format of an object embedded in an HTML page. Always hyphenate and don't use as a synonym for *add-in*, which is software that adds functionality to a larger program.

For example: Run the JavaScript plug-in.

Plurals

- Don't use apostrophes to form plurals of proper nouns, acronyms, and numerals. For example, the plural of FAQ is FAQs, not FAQ's.
- Don't pluralize single letters, symbols, or mathematical signs by adding an apostrophe and an s.
 - **Incorrect:** Salesforce replaces unrecognizable characters with @'s.
 - **Correct:** Salesforce replaces unrecognizable characters with the at (@) sign.
- To form the plural of a numeral, add s but no apostrophe: Type three 2s.
- In abbreviations for measurements, don't add an s to indicate plurality. For example: 10 oz or 30 mm

Pop Out, Pop-Out

- pop out (verb): Use *pop out* to describe opening a separate browser window.
For example: To get the most from your chat experience, pop out your chat to a separate browser window.
- pop-out (adjective): Use *pop-out* as an adjective to describe the type of browser window. Always hyphenate.
For example: Continue your chat in the pop-out window.

Compare to [Popup Windows](#).

Popup Windows

Use *popup window* to describe a new, separate browser window that opens during an action on a page. Use [title-style capitalization](#) for popup window names. *Popup* is always one word; never hyphenate. For example: Click a custom button to display a record in a popup window.

Compare to [Dialog Boxes](#), [Overlay](#), and [Pop Out, Pop-Out](#).

Press

Use *press* as a verb to describe the act of striking keys on a keyboard, or of pressing a button on a mobile device. Examples:

- Press CTRL. (keyboard)
- Press the menu key. (BlackBerry)
- Press the Home button. (iOS)

Programs

Don't capitalize when used as part of a name, unless in a heading or considered part of the proper name.

Q

Quotation Marks

In code samples, to prevent the code from breaking when run, use straight quotation marks. For example:

```
mail.setReplyTo('support@acme.com')
```

. Elsewhere, use curved quotation marks (also called smart quotes).

R

Radio Buttons

A user interface control that offers several mutually exclusive options. Users can select only one of the options.

For radio button fields on a record, follow the guidelines for [Field Names](#). For radio button settings on Setup pages (which tend to be lengthy), use initial caps.

Record Names

Don't capitalize *record* when used as part of a name, unless in a heading or considered part of the proper name.

Report Names

Use [title-style capitalization](#). Don't capitalize *report* unless it's part of the report name.

Rich Text Area

Don't add a hyphen before *text* in Rich Text Area or Long Text Area.

S

(S)

Don't add (s) to the end of nouns unless it significantly reduces sentence complexity. Instead, use the plural, *one or more*, or *[item] or [items]*. For example:

- Select the products you want to add.
- Email sync server(s)

Salesforce

Use Salesforce, when you refer to the company name or the product name. In copyright or trademark text, use [salesforce.com](#).



Example: You can view and work with your Salesforce records directly in Microsoft® Outlook® using Salesforce for Outlook.

salesforce.com

Use salesforce.com only in copyright and trademark text. Use [Salesforce](#) when you refer to the product and the company name.

Capitalize salesforce.com only at the beginning of a sentence.



Example: © Copyright 2000–[current year] salesforce.com, inc. All rights reserved. Various trademarks held by their respective owners.

Salesforce Help

When you refer to the online help, use *the Salesforce Help*. Make sure to match the case. We based this standard on the *Microsoft® Manual of Style for Technical Publications*.

Example: Learn more about the Salesforce Side Panel in the Salesforce Help.

Do not use any variations, including these:

- *help*
- *online help*
- *Salesforce help*

Screen Names

Use [title-style capitalization](#) for UI pages, related lists, and screen names. In documentation, use the page name exactly as it appears on the screen.

Use *page* instead of *screen* to refer to the user interface.

Don't capitalize *screen* when it is part of a name, unless it is used in a heading or considered part of the proper name.

Screenshot, Screen Shot

Use *screenshot* and not *screen shot*.

Second Person, Third Person

- For user documentation and UI text, use the second person, *you*, which makes the writing more informal and personal.
- In user documentation, use the imperative voice whenever possible.
- In UI text and both user and developer documentation, *you* or the imperative is almost always appropriate in procedures, since the person reading the documentation is usually the same person trying to perform the task. For example:
 - Select the `Tag` checkbox to enable tagging.
 - Download Eclipse from the Salesforce Developers website.
- Omit *You can* when possible as it unnecessarily increases word count.
- Use the third person when the information isn't directed at a specific user, though this sometimes means using the [passive voice](#). For example: If this header isn't used or the value of its element is null, the opportunities are transferred to the forecast manager in the specified territory.
- Be aware of the various, possible contexts for the information. Some text is extremely sensitive to context, and procedures or explanations of how a feature or component works must be written with different user contexts in mind. This is because the person reading the documentation is most likely not the one issuing the command or method under discussion. Developers may read information that they need to know to write a client program that actually executes the command, so phrases like *you* or *your organization* aren't always right.
- See also [First Person](#).

Semicolons

Avoid if possible by rephrasing your content into shorter, simpler sentences. If needed, a semicolon can be used to:

- Separate coordinate clauses that contain commas
- Separate a lengthy or complex series
- Precede *then* when used transitionally between clauses of a compound sentence. Avoid these other overly formal conjunctive adjectives: *therefore*, *likewise*, *consequently*, and *accordingly*.
- Separate clauses of a compound sentence that are very long or are themselves subdivided by commas.
- Separate items in a series that are long and complex.

Place semicolons and colons outside quotation marks and parentheses.

Setup, Set Up

Setup is a noun or an adjective. *Set up* is a verb phrase. *Example:* After you *set up* your Self-Service portal, your *setup* is complete.

Setup (noun) can also mean the Setup page in Salesforce. *Example:* Setup is where you set up your Self-Service portal.

When referring to the Setup page:

- Use “Setup” or “the Setup page.”
- Exclude setup categories such as Administration Setup and App Setup from navigation paths.

Sign up, Sign-Up

Sign up is a verb. *Sign-up* is an adjective or noun. Don't use *signup*. For example:

- When you sign up, choose your template.
- During sign-up, choose your template.
- The sign-up process is easy.

Slashes (/)

- Avoid using slashes (/). In most instances, a slash means *or*, so use *or* instead.
- It's acceptable to use slashes in the names of system components, software packages, and so on when appropriate. Also, be especially aware that, in many cases, slashes may be parts of commands or instructions that are essential to perform the task.

See also [And/Or](#).

Smartphone

One word, lowercase *p*.

A handheld computing device equipped with telephony. Use instead of *phone* on first mention in a topic.

Sorry

Use *sorry* only in error messages that result in serious problems for the user (for example, data loss, the user can't continue to use Salesforce, or the user must get help from Customer Support to continue). Avoid apologizing if the issue occurred during normal Salesforce functions.



Example:

- **Avoid:** Sorry, but you must supply a search string of at least two characters.
- **Better:** Sorry, but you must exit and log in again.

Spacing

- Insert a space between a number and any multiple-letter abbreviation or unit symbol it modifies: 120 MB
- Omit a space between a number and a single-letter abbreviation or unit symbol: 90%, 401(k)
- When a measurement is used as an adjective, use a hyphen to connect the number to the measurement, as in *10-point type*. Otherwise, don't use a hyphen.

- Avoid using [Nonbreaking Spaces](#).

Subtab

A tab within a tab as used in customizable forecasting and recurring events. Don't capitalize in general usage. Refer to the guidelines for [Tab](#).

Support Agent

Use *support agent* to refer to a customer support user. Don't use *rep*, *support rep*, *support representative*, *customer support representative*, or *customer support agent*.

Symbols

- When referring to a symbol, spell out the name of the symbol and then enter the symbol in parentheses after it. For example:
 - When using an equal (=) sign, add one space on each side.
 - Wrap greater-than (>) and less-than (<) signs in parentheses rather than quotation marks.
- Omit a space between a number and a single-letter abbreviation or unit symbol: 90%, 401(k)
- Don't pluralize single letters, symbols, or mathematical signs by adding an apostrophe and an s.
- Spell out terms such as *pi* and *theta* instead of using the symbol.

Sync

Sync refers to transferring and merging your data within Salesforce or between Salesforce and a desktop or mobile application. For example, you can sync data between Salesforce objects, like quotes and opportunities, or with external applications, like Microsoft Outlook, Connect Offline, or Salesforce Mobile.

Use *sync* instead of *synchronize* or *synchronization* in general use. You can also use *resync*.

The following terms are related to whether transactions in a group are executed one at a time (synchronous) or at the same or overlapping times (asynchronous). Spell them out:

- asynchronous
- asynchronously
- synchronous

System Administrator

Don't use *system administrator*. Use *Salesforce admin*, but use *Salesforce administrator* for UI text and end-user documentation related to logging in. If you're using the phrase *Salesforce admin* more than a few times in a topic, it's OK to shorten to *admin*.

T

Tab

An interface component that lets you navigate around an app. A tab serves as the starting point for viewing, editing, and entering information for a particular object. When you click a tab at the top of the page, the corresponding tab home page for that object appears. A tab can be associated with an object, a Web page, or a Visualforce page.

- Capitalize the names of all tabs in the application. Refer to them using the exact spelling in the user interface. For example: *Accounts tab*, not *Account tab*. Don't capitalize *tab* in general usage.
- When describing an action on a tab, use *on the tab_name tab*, not *in the tab_name tab*.
- In the UI, add “ - Selected” to the hover text for the selected tab; for example, Accounts - Selected.

Tables

- Avoid using captions for tables.
- Don't add an introductory phrase (also known as a *stem*) to a task or table that appears soon after a topic's title. For example, a set of steps that immediately follows the title *Editing a File* does not need the introductory phrase “To edit a file:”. If you include only essential introductory content in a task, you'll never need a stem.
- Don't introduce tables using “The following table.” Instead, say “The table” or “This table.”
- Capitalize each column heading in a table, the first word of each column entry, and proper nouns. However, don't change the capitalization of objects, methods, calls, or other language constructs, such as the Account object or `create()`. Use sentence case if the heading is a complete sentence or partial introduction to a sentence, as in some FAQ tables.

Time

For time values in a twelve-hour system, use AM/PM preceded by a space. For example, 10:30 PM. Don't use a.m., p.m., A.M., P.M., am, or pm.

Titles and Headings

Title and heading styles depend on whether you are writing a concept, task, or reference topic. For title capitalization styles, see [Capitalization](#).

Overview Titles

An overview is a topic focused entirely on conceptual information. Use the format: <X> Overview. For example: Cases Overview. Don't use Managing <X>, Working with <X>, What is <X>?, or About <X>.

Task Titles and Stems

- Use an imperative verb instead of a gerund for task titles. For example, use “Add Users” instead of “Adding Users” and “Create a Custom Field”, not “Creating Custom Fields”.
- Use a title that describes the customer's goal, not the UI task, whenever possible. For example, the title “Create a Custom Object” for a task about creating custom objects is better than something more generic. Don't use broad phrases like “Create the Infrastructure to Store Your Data”.

- Don't add an introductory phrase (also known as a *stem*) to a task or table that appears soon after a topic's title. For example, a set of steps that immediately follows the title *Editing a File* does not need the introductory phrase "To edit a file:". If you include only essential introductory content in a task, you'll never need a stem.

Touchscreen

One word.

A touchscreen is an electronic visual display that detects the presence and location of contact with its surface, so that users can manipulate a device's interface by touching the surface with a finger or stylus. Many popular mobile touchscreen devices are equipped with multi-touch technology, which means the touchscreen can recognize the presence of two or more points of contact.

Trademarks, Registered Trademarks

For trademarked and registered trademarked items, include the appropriate symbol with the first or most prominent use of the item. Subsequent uses within the same page or chapter don't need the symbol.

Use a trademarked name only as an adjective, not as a noun or a verb (for example, write *your BlackBerry smartphone*, not *your BlackBerry*), and do not alter a trademark (for example, do not use *BlackBerries*). For Microsoft trademarks, see the [Microsoft Trademarks Web page](#).

U

Unavailable

- Unavailable—Use for a menu item, drop-down list option, or other selection that is currently unusable: Some options may be unavailable depending on your license type.
- Disable—Use to describe the act of making something unavailable: Select `Disable` to disable task alerts.
- Disabled—Use for a feature that is not enabled: Email-to-Case is disabled on sandbox.

Don't use Grayed Out, Dimmed, or Uneditable. Editable can be used to describe a record or element that can be modified.

URL

Acronym for Uniform Resource Locator (previously Universal Resource Locator). The global address of a website, document, or other resource on the Internet. For example, `http://www.salesforce.com`.

Acceptable as an acronym by itself. Use *a URL*, not *an URL*.

Referring to External Websites

- For links to external websites, use the website name as the link text, such as *You can download the latest Acrobat Reader from [Adobe](#)* whenever possible. Otherwise, use the full URL for the link text excluding the `http://` prefix. For example, *You can download the latest Acrobat Reader from www.adobe.com/products/acrobat/readstep2.html*. For URLs that begin with `https://` or `ftp://`, include the prefix.
- Link to only reputable, static sites. Do not link to Wikipedia.
- If you must refer to a possibly unstable site, provide context for your readers so they can perform their own internet searches to find more information.
- Don't use external links to the unauthenticated Help, because that URL is subject to change.

V

Version Numbers

For API and product version numbers:

- Use *earlier* instead of *lower* or *below*, as in *Internet Explorer 6.0 and earlier*.
- Use *later* instead of *above*, as in *Internet Explorer 7.0 and later*.
- Include a tenths value for Salesforce API version numbers. For example, this object is available in API version 43.0 and later.

Voice

Use active voice whenever possible. Be careful not to change the meaning of a sentence when rewording from passive to active voice.

Passive voice can be appropriate in some cases. For example,

- When active voice creates an awkward construction
- The subject is unknown or not the focus of the sentence
- You want to avoid blaming the user
- To convey an impersonal tone for a technical audience

Here are some strategies and examples for changing passive voice to active voice.

Strategy	Examples	
Identify the real subject and switch from passive to active voice.	Passive Voice	Active Voice
	The data is entered by the user.	The user enters the data.
	When you create an action, its layout is populated with a default set of fields.	When you create an action, Salesforce populates its layout with a default set of fields.
Replace the passive voice with the imperative.	If you want to place a frame script on a tween layer, it must be created on another layer and dragged to the tween layer as well.	To place frame scripts on a tween layer, create them on another layer and drag them to the tween layer.
Is a technology the subject of the sentence? Sometimes the active voice is awkward, and the passive voice is better.	The variable is passed in the URL. Convert a field's type from one that's supported for actions to one that isn't supported.	

W

Web

- Capitalize all words when using the expanded form: *World Wide Web*.
- Don't capitalize *web* when using it by itself, such as in *web browser*, *web portal*, or *web page*.
- Write *website* or *webmaster* as one word.

Webmaster

One word. Only capitalize in titles or at the beginning of a sentence.

Website

One word. Only capitalize in titles or at the beginning of a sentence.

Which, That

Use *that* to identify a particular item and *which* to add more detail about something.

- Use *that* for restrictive or defining clauses: The system administrator accesses the screen *that* creates reports.
- Use *which* for nonrestrictive clauses: This screen, *which* is a new enhancement, reduces duplication of data entry.

Who, That

Both *that* and *who* can be used to refer to a person, but *who* is considered more polite: The user *who* logs in first can access the new feature.

Wi-Fi

Hyphenate. Capitalize the *W* and the *F*.

Wi-Fi™ is a registered trademark of the Wi-Fi Alliance and the brand name for products based on IEEE 801.11 standards. Use *Wi-Fi* when referring to the wireless connection on a mobile device or to wireless networks.

Windows

Use [title-style capitalization](#) for window names.

Don't list the following UI element types unless needed for clarity or navigation: button, checkbox, drop-down button, field, icon, menu, link, radio button, or window. For example, write *Click **Save***, not *Click the **Save** button*.

WYSIWYG

Acceptable as an acronym by itself. Stands for What You See Is What You Get.

GLOSSARY

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#)

This glossary defines terms that appear throughout the Salesforce user interface and documentation.

A

Account

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

Account Assignment Rule

A rule that automatically assigns accounts to territories, based on criteria you define.

Account Team

An account team is a team of users that work together on an account. For example, an account team may include an executive sponsor, dedicated support agent, or project manager.

Activity

An event, a task, a call you've logged, or an email you've sent. You can relate an activity to other records, such as an account, a lead, an opportunity, or a case. In an org with Shared Activities enabled, you can relate an activity to multiple contacts. Tasks can also be generated by workflow rules and approval processes configured by a Salesforce admin.

Activity History

The Activity History related list of a record displays all completed tasks, logged phone calls, saved interaction logs, expired events, outbound email, mass email, email added from Microsoft® Outlook®, and merged documents for the record and its associated records.

Administrator (System Administrator)

One or more individuals in your organization who can configure and customize the application. Users assigned to the System Administrator profile have administrator privileges.

Advanced Function

A formula function designed for use in custom buttons, links, and s-controls. For example, the `INCLUDE` advanced function returns the content from an s-control snippet.

Advanced Search

A search function within Salesforce that offers search features and functionality. To access it, click **Advanced Search...** in the sidebar.

Add-on

An add-on is a type of quote for a current customer who wants to add a license or product through the end of the current contract.

Age

In opportunity reports, the Age of an open opportunity is the number of days since the opportunity was created. For closed opportunities, Age is the number of days between the creation date and the closed date.

In case reports, the Age of an open case is the elapsed time from creation to the present. The Age of a closed case is the elapsed time from creation to the closing time of the case. You can choose to view the Age of a case in days, hours, or minutes.

Agent

A Salesforce CRM Call Center user who handles inbound or outbound calls. An agent is usually identified by a four-digit number that serves as the agent's ID within the associated computer telephony integration (CTI) system.

Agent Console

See Salesforce Console and Console Tab.

AJAX Toolkit

A JavaScript wrapper around the API that allows you to execute any API call and access any object you have permission to view from within JavaScript code. For more information, see the [AJAX Toolkit Developer's Guide](#).

Amount Without Adjustments

Applies to Collaborative Forecasts. 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 Adjustment

Applies to Collaborative Forecasts. 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.

Amount Without Owner Adjustment

Applies to Collaborative Forecasts. The forecast amount as seen by the forecast owner without the owner's adjustment. This is the sum of the subordinate's opportunities, including adjustments made by their manager or by the subordinate themselves, plus the rollup of the owner's own opportunities. *It doesn't include adjustments made by the forecast owner.*

Ant Migration Tool

A toolkit that allows you to write an Apache Ant build script for migrating Lightning Platform components between a local file system and a Salesforce organization.

Apex Connector Framework

The Apex Connector Framework is a set of classes and methods in the DataSource namespace for creating a custom adapter for Salesforce Connect. Create a custom adapter to connect to data that's stored outside your Salesforce org when the other available Salesforce Connect adapters aren't suitable for your needs.

Reporting Snapshot

A reporting snapshot lets you report on historical data. Authorized users can save tabular or summary report results to fields on a custom object, then map those fields to corresponding fields on a target object. They can then schedule when to run the report to load the custom object's fields with the report's data.

Reporting Snapshot Running User

The user whose security settings determine the source report's level of access to data. This bypasses all security settings, giving all users who can view the results of the source report in the target object access to data they might not be able to see otherwise.

Reporting Snapshot Source Report

The custom report scheduled to run and load data as records into a custom object.

Reporting Snapshot Target Object

The custom object that receives the results of the source report as records.

Annuity

See Quantity Schedule and Revenue Schedule.

Anonymous Block, Apex

Apex code that does not get stored in Salesforce, but that can be compiled and executed by using the `ExecuteAnonymousResult()` API call, or the equivalent in the AJAX Toolkit.

Answers

Answers is a feature of the Community application that enables users to ask questions and have community members post replies. Community members can then vote on the helpfulness of each reply, and the person who asked the question can mark one reply as the best answer.

Anti-Join

An anti-join is a subquery on another object in a `NOT IN` clause in a SOQL query. You can use anti-joins to create advanced queries. See also Semi-Join.

Apex

Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Lightning platform server in conjunction with calls to the Lightning Platform API. Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web service requests and from triggers on objects.

Apex Controller

See Controller, Visualforce.

Apex-Managed Sharing

Enables developers to programmatically manipulate sharing to support their application's behavior. Apex-managed sharing is only available for custom objects.

Apex Page

See Visualforce page.

API Version

See Version.

App

Short for "application." A collection of components such as tabs, reports, dashboards, and Visualforce pages that address a specific business need. Salesforce provides standard apps such as Sales and Service. You can customize the standard apps to match the way you work. In addition, you can package an app and upload it to the AppExchange along with related components such as custom fields, custom tabs, and custom objects. Then, you can make the app available to other Salesforce users from the AppExchange.

App Launcher

The App Launcher presents tiles that link to your connected apps and standard apps, all from one location in Salesforce. All Lightning Experience users have access to the App Launcher. Salesforce Classic users must have the "Use Identity Features" permission and the App Launcher option in their profile set to **Visible**. In Salesforce Classic, the App Launcher appears as an app in the App menu.

App Menu

See App Menu.

AppExchange

The AppExchange is a sharing interface from Salesforce that allows you to browse and share apps and services for the Lightning Platform.

AppExchange Listing

An AppExchange listing is a description of your app or service on the AppExchange. It is your primary marketing tool for promoting your app or service to the AppExchange community.

AppExchange Publishing Organization

The AppExchange Publishing Organization (APO) is the master organization that you as a partner use to publish listings on the AppExchange. Child organizations where you develop applications can be linked to your APO, thus tying your listings together under a single provider entity to deliver a consistent message to customers.

AppExchange Security Review

The AppExchange Security Review ensures that an app is safe for customers to install. Before an app can be listed publicly on the AppExchange it must pass the AppExchange Security Review. Providers are obligated to resubmit an app for security review whenever the app is updated.

AppExchange Upgrades

Upgrading an app is the process of installing a newer version.

Application Lifecycle Management (ALM)

The process of managing an application's lifecycle, from planning, to development, to integration, to support.

Application Programming Interface (API)

The interface that a computer system, library, or application provides to allow other computer programs to request services from it and exchange data.

Approval Action

See Automated Actions.

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.

Approval Process Diagram

A visual, flowchart representation of an approval process. From a detail page of an approval process, you can open the diagram by launching the Process Visualizer.

Approval Request

An approval request is an email, Salesforce app notification, Lightning Experience notification, or Chatter post notifying the recipient that a record was submitted for approval and that his or her approval is requested.

Approval Steps

Approval steps define the chain of approval for a particular approval process. Each step determines which records can advance to that step, who to assign approval requests to, and whether to let each approver's delegate respond to the requests. The first step specifies what to do if a record doesn't advance to that step. Later steps specify what happens if an approver rejects the request.

Approvals in Chatter

If your organization has both Approvals and Chatter enabled, administrators can turn on Approvals in Chatter. Users then receive approval requests as posts in their Chatter feeds.

Archived Article

Archived articles were published but later removed from public visibility. Article managers can view and manage archived articles on the Article Management tab by clicking the **Articles** tab in the View area and choosing **Archived Articles**. Archived articles are not visible in the Articles tab (in any channel) or the public knowledge base. Articles can be archived manually or automatically via an expiration date.

Article

Articles capture information about your company's products and services that you want to make available in your knowledge base.

Article Manager

Salesforce uses the term *article manager* to represent a specific type of user. Article managers can access the Article Management tab to create, edit, assign, publish, archive, and delete articles. Article managers are sometimes referred to as knowledge managers. Article managers require the "Manage Articles" user permission. The Article Management tab is not visible to users without "Manage Articles."

Article Type

All articles in Salesforce Knowledge are assigned to an *article type*. An article's type determines the type of content it contains, its appearance, and which users can access it. For example, a simple FAQ article type can have two custom fields, *Question* and *Answer*, where article managers enter data when creating or updating FAQ articles. A more complex article type can have dozens of fields organized into several sections. Using layouts and templates, administrators can structure the article type in the most effective way for its particular content. User access to article types is controlled by permissions. For each article type, an administrator can grant "Create," "Read," "Edit," or "Delete" permissions to users. For example, the article manager can allow internal users to read, create, and edit FAQ article types, but let partner users only read FAQs.

Article-Type Layout

An *article-type layout* enables administrators to create sections that organize the fields on an article, as well as choose which fields users can view and edit. One layout is available per article type. Administrators modify the layout from the article-type detail page.

Article-Type Template

An *article-type template* specifies how the sections in the article-type layout are rendered. An article type can have a different template for each of its four channels. For example, if the Customer Portal channel on the FAQ article-type is assigned to the Tab template, the sections in the FAQ's layout appear as tabs when customers view an FAQ article. For the Table of Contents template, the sections defined in the layout appear on a single page (with hyperlinks) when the article is viewed. Salesforce provides two standard article-type templates, Tab and Table of Contents. Custom templates can be created with Visualforce.

Asset

A specific model or type of product that a customer owns. Depending on how your organization uses assets, they can represent your products that the customer has purchased and installed or your competitor's products that the customer uses.

Assigned Approver

The assigned approver is the user responsible for responding to an approval request.

Assignment

An assignment is a draft article that has been assigned to another user for editing. Assignments can contain brief instructions and a due date.

Asynchronous Calls

A call that doesn't return results immediately because the operation can take a long time. Calls in the Metadata API and Bulk API are asynchronous.

Autolaunched Flow

An *autolaunched flow* can be launched without user interaction, such as from a process or the Apex `Interview.start` method. Autolaunched flows run in bulk and without user interaction. They can't contain steps, screens, choices, or dynamic choices in the active or latest flow version.

Automatic Number Identification (ANI)

The number from which a caller is dialing in Salesforce CRM Call Center.

Auto Number

A custom field type that automatically adds a unique sequential number to each record. These fields are read only.

Auto-Response Rule

A set of conditions for sending automatic email responses to case or lead submissions based on the attributes of the submitted record. Applicable cases include those submitted through a Self-Service portal, a Customer Portal, a Web-to-Case form, an Email-to-Case message, or an On-Demand Email-to-Case message. Applicable leads include those captured through a Web-to-Lead form.

B

Batch Apex

The ability to perform long, complex operations on many records at a scheduled time using Apex.

Batch, Bulk API

A batch is a CSV, XML, or JSON representation of a set of records in the Bulk API. You can process a set of records by creating a job that contains one or more batches. The server processes each batch independently, not necessarily in the order it is received. See Job, Bulk API.

Best Answer

When a member of an answers community asks a question and other community members post a reply, the asker can mark one of the replies as the best answer. The best answer then appears directly under the question (above the other replies). Identifying the best answer helps other community members with the same question quickly find the most relevant, useful information.

Best Case Amount

Revenue projection in a forecast that identifies total “possible” revenue for a specific month or quarter. For managers, equals the total amount of revenue they and their entire team can possibly generate.

Beta, Managed Package

In the context of managed packages, a beta managed package is an early version of a managed package distributed to a sampling of your intended audience to test it.

Blank lookup

A lookup that is performed when the lookup field dialog does not have a search term.

Boolean Operators

You can use Boolean operators in report filters to specify the logical relationship between two values. For example, the AND operator between two values yields search results that include both values. Likewise, the OR operator between two values yields search results that include either value.

Briefcase

The set of data that you can manage offline using Connect Offline.

Bucketing

A tool in the report builder that lets users categorize report records by field, without having to create a formula or a custom field.

Bulk API

The REST-based Bulk API is optimized for processing large sets of data. It allows you to query, insert, update, upsert, or delete a large number of records asynchronously by submitting a number of batches which are processed in the background by Salesforce. See also SOAP API.

Business Account

A company or organization that you want to track.

C

Call

Any inbound, outbound, consult, or internal voice connection via telephone.

Call Center

A group within a company or a third-party organization that handles telephone sales or service. See Salesforce CRM Call Center.

Callout, Apex

An Apex callout enables you to tightly integrate your Apex with an external service by making a call to an external Web service or sending a HTTP request from Apex code and then receiving the response.

Campaign

A marketing initiative, such as an advertisement, direct mail, or conference, that you conduct in order to generate prospects and build brand awareness.

Campaign Hierarchy

A set of up to five campaigns organized into a hierarchy. A parent campaign can have several child campaigns, but a child campaign can have only one parent.

Campaign Member

Any lead or contact associated with a campaign.

Campaign ROI (Return On Investment)

The campaign ROI is the return on your marketing investment. Use the Campaign ROI Analysis Report to analyze the ROI. The ROI is calculated as the net gain ($\text{Total Value Won Opps} - \text{Actual Cost}$) divided by the Actual Cost . The ROI result is expressed as a percentage.

Cascading Style Sheet (CSS)

Files that contain all of the information relevant to color, font, borders, and images that are displayed in a user interface.

Case

Detailed description of a customer's feedback, problem, or question. Used to track and solve your customers' issues.

Case, Checkout

A case is a detailed description of your feedback, problem, or question. It is used to track and solve your Checkout issues.

Case Feed

Case Feed gives support agents a more streamlined way of creating, managing, and viewing cases. It includes actions and a Chatter feed. The actions let agents create case notes, log calls, change the status of cases, and communicate with customers. The feed displays important case events in chronological order, so it's easy to see the progress of each case.

Category, Ideas

Categories are administrator-defined values that help organize ideas into logical sub-groups within a zone. The View Category drop-down list on the Ideas tab allows users to filter ideas by category, and the `Categories` picklist on the Post Ideas page lets users add categories to their ideas. For example, if your ideas zone has the focus "Improvements to our clothing line," then you might set up categories such as "Shirts," "Jackets," and "Slacks." Each organization has one common set of categories that can be added or removed from each zone. An administrator defines separate categories for their ideas and answers zones.

Category, Solutions

A label you can apply to a solution to group similar solutions together. Solution categories help customer support representatives find solutions faster when solving cases. If you use the Self-Service portal or public solutions, your customers can browse solutions by category to find what they need. See also Parent Category.

Category, Knowledge and Answers

See Data Category for Answers and Data Category for Articles.

Category Group for Answers

In an answers zone, a *category group* provides one or more categories that help organize questions for easy browsing. If the category group contains a hierarchy, only the first-level categories display on the Answers tab. For example, if you're a computer manufacturer you might create a Products category group for your Products zone that has four categories: Performance Laptops, Portable Laptops, Gaming Desktops, and Enterprise Desktops. Zone members can choose one of the categories to assign to a question. Administrators create the category group and categories and then associate the category group with their answers zone. An administrator defines separate categories for their ideas and answers zones.

Category Group for Articles

In Salesforce Knowledge, a *category group* organizes data categories into a logical hierarchy. For example, to classify articles by sales regions and business units, create two category groups, Sales Regions and Business Units. The Sales Regions category group could consist of a geographical hierarchy, such as All Sales Regions as the top level, North America, Europe, and Asia at the second level, and so on up to five levels. When creating articles, authors assign the relevant categories to the article. End users searching for articles can search and filter by category.

Channel

A channel refers to the medium by which an article is available. Salesforce Knowledge offers four channels where you can make articles available.

- Internal App: Salesforce users can access articles in the Articles tab depending on their role visibility.

- **Customer:** Customers can access articles if the Articles tab is available in a community or Customer Portal. Customer users inherit the role visibility of the manager on the account. In a community, the article is only available to users with Customer Community or Customer Community Plus licenses.
- **Partner:** Partners can access articles if the Articles tab is available in a community or partner portal. Partner users inherit the role visibility of the manager on the account. In a community, the article is only available to users with Partner Community licenses.
- **Public Knowledge Base:** Articles can be made available to anonymous users by creating a public knowledge base using the *Sample Public Knowledge Base for Salesforce Knowledge* app from the AppExchange. Creating a public knowledge base requires Sites and Visualforce.

Channel Manager

Channel managers are the internal users that manage your partners.

Chat Window

A Web-based interface where your customers or website visitors engage in text chats with customer support agents. Customers access the Chat window by clicking a Chat button or link on your organization's website.

Chatlet

A chatlet is a mini application that runs within the Live Agent console. There are chatlets that integrate with Salesforce and Salesforce Knowledge, as well as chatlets that provide information on incoming chat requests, visitor geographical location, and browsing history.

Chatter Answers

Chatter Answers is a self-service support community where users can post questions and receive answers and comments from other users or your support agents.

Chatter Bookmarks

Chatter bookmarks let you keep track of individual posts that interest you. When someone comments on a post you bookmarked, you receive an email notification.

Chatter Favorite

Chatter favorites are shortcuts on your Chatter tab to the latest posts and comments for topics, list views, and Chatter feed searches.

Chatter Feed

A list of recent activities in Salesforce. Chatter feeds display:

- On the Chatter or Home tab, where you can see your posts, posts from people you follow, and updates to records you follow, and posts to groups you're a member of
- On profiles, where you can see posts made by the person whose profile you're viewing
- On records, where you can see updates to the record you're viewing
- On Chatter groups, where you can see posts to the group you're viewing

Chatter Group

Chatter groups let you share information with specific people. For example, if you're working on a project and want to share information only with your team members, you can create a Chatter group for your team. Chatter groups include a list of members, a Chatter feed, and a photo. You can create the following types of Chatter groups:

- **Public:** Only group members can post, but anyone can see the posts and join the public group.
- **Private:** Only group members can post and see the posts. The group's owner or managers must add members.

Chatter Mobile

A free mobile application that lets you collaborate in Chatter from your mobile device. Use Chatter Mobile to post and comment in Chatter, and receive updates about the people, records, and files you follow and your groups.

Checkout

Checkout is the online store where you can purchase seats and other related products for Salesforce and Data.com.

Child Relationship

A relationship that has been defined on an sObject that references another sObject as the “one” side of a one-to-many relationship. For example, contacts, opportunities, and tasks have child relationships with accounts.

See also sObject.

Class, Apex

A template or blueprint from which Apex objects are created. Classes consist of other classes, user-defined methods, variables, exception types, and static initialization code. In most cases, Apex classes are modeled on their counterparts in Java.

Client App

An app that runs outside the Salesforce user interface and uses only the Lightning Platform API or Bulk API. It typically runs on a desktop or mobile device. These apps treat the platform as a data source, using the development model of whatever tool and platform for which they are designed.

Clone

Clone is the name of a button or link that allows you to create a new item by copying the information from an existing item, for example, a contact or opportunity.

Cloud Computing

A model for software development and distribution based on the Internet. The technology infrastructure for a service, including data, is hosted on the Internet. This allows consumers to develop and use services with browsers or other thin clients instead of investing in hardware, software, or maintenance.

Cloud Flow Designer

Cloud-based application that lets administrators create a flow for use in Salesforce.

Code Coverage

A way to identify which lines of code are exercised by a set of unit tests, and which are not. This helps you identify sections of code that are completely untested and therefore at greatest risk of containing a bug or introducing a regression in the future.

Collapsible Section

Sections on detail pages that users can hide or show.

Combination Chart

A combination chart plots multiple sets of data on a single chart. Each set of data is based on a different field, so values are easy to compare. You can also combine certain chart types to present data in different ways on a single chart.

Comment

Comments are plain text responses to posted ideas that enable discussions about the ideas. On the Ideas tab, the Comments subtab lists the comments that have most recently been submitted. On the detail page of an idea, comments are sorted in chronological order from oldest to newest.

Comment, Chatter

A reply to a post in a Chatter feed.

Commit Amount

Amount entered in a forecast that an individual salesperson is reasonably confident of closing in a particular month or quarter. For managers, this should equal the amount that they and their team can confidently close.

Community

Communities are customizable public or private spaces for employees, end-customers, and partners to collaborate on best practices and business processes.

Community Application

The Community application includes the ideas and answers features. The Community app is available in the app menu.

Community Expert

A community expert is a member of the community who speaks credibly and authoritatively on behalf of your organization. When community experts post comments or ideas, a unique icon (🌟👤) displays next to their name. The Salesforce administrator can designate as many community experts as necessary.

Competitor

Related list that displays competitor names, strengths, and weaknesses entered for a specific opportunity.

Component, Metadata

A component is an instance of a metadata type in the Metadata API. For example, CustomObject is a metadata type for custom objects, and the MyCustomObject__c component is an instance of a custom object. A component is described in an XML file and it can be deployed or retrieved using the Metadata API, or tools built on top of it, such as the Force.com IDE or the Ant Migration Tool.

Component, Visualforce

Something that can be added to a Visualforce page with a set of tags, for example, <apex:detail>. Visualforce includes a number of standard components, or you can create your own custom components.

Component Reference, Visualforce

A description of the standard and custom Visualforce components that are available in your organization. You can access the component library from the development footer of any Visualforce page or the [Visualforce Developer's Guide](#).

Composite App

An app that combines native platform functionality with one or more external Web services, such as Yahoo! Maps. Composite apps allow for more flexibility and integration with other services, but may require running and managing external code. See also Client App and Native App.

Computer-Telephony Integration (CTI)

The linkage between a telephone system and a computer that facilitates incoming- and outgoing-call handling and control.

Connect for Office

Product that integrates Salesforce with Microsoft® Word and Excel.

Connect for Outlook

Connect for Outlook is retired. The product was our legacy sync add-in for Microsoft® Outlook® 2007 and earlier.

Connect Offline

Product that allows salespeople to use Salesforce to update their data remotely, anywhere, anytime—totally unplugged.

Connected App

A connected app integrates an application with Salesforce using APIs. Connected apps use standard SAML and OAuth protocols to authenticate, provide single sign-on, and provide tokens for use with Salesforce APIs. In addition to standard OAuth capabilities, connected apps allow Salesforce admins to set various security policies and have explicit control over who can use the corresponding apps.

Connected User

When using the cross-org adapter for Salesforce Connect, the connected user is the user in the provider org whose credentials are used by the subscriber org to log in to the provider org. The connected user's access to data in the provider org affects which data can be accessed from within the subscriber org.

Connection (for Salesforce to Salesforce)

A business partner that you invite to share data using Salesforce to Salesforce.

Console Layout

Objects chosen by an administrator to display in the list view frame of the Agent console. For example, if an administrator adds cases to a console layout, then users whose profiles are assigned to that console layout can see list views of cases in the console's list view frame.

Console Tab

A tab containing the Agent console, which combines related records into one screen with different frames so that users can view and edit information all in one place.

Consult Call

A call that results from a Salesforce CRM Call Center user initiating a conference or transfer.

Contact

Contacts are the individuals associated with your accounts.

Contact Manager Edition

A Salesforce edition designed for small businesses that provides access to key contact management features.

Contact Role

The role that a contact plays in a specific account, contract, or opportunity, such as “Decision Maker” or “Evaluator.” You can mark one contact as the “primary” contact for the account, contract, or opportunity. A contact can have different roles in various accounts, contract, or opportunities.

Content Delivery

A file that has been converted into an optimized online format for distributions to leads, contacts, and colleagues.

Content Pack

A collection of related documents or files that are stored as a group in Salesforce CRM Content.

Contract

A *contract* is an agreement defining the terms of business between parties.

Contract, Checkout

A contract is a written agreement defining the terms of doing business between Salesforce and your organization.

Contract Line Item

Contract line items are specific products covered by a service contract. They only display to users on the Contract Line Items related list on service contracts, not contracts.

Controller, Visualforce

An Apex class that provides a Visualforce page with the data and business logic it needs to run. Visualforce pages can use the standard controllers that come by default with every standard or custom object, or they can use custom controllers.

Controller Extension

A controller extension is an Apex class that extends the functionality of a standard or custom controller.

Controlling Field

Any standard or custom picklist or checkbox field whose values control the available values in one or more corresponding dependent fields.

Convert

Button or link that allows you to change a qualified lead into an account, contact, and, optionally, an opportunity. Information from the lead fields is transferred into the appropriate account, contact, and opportunity fields.

Cookie

Client-specific data used by some Web applications to store user and session-specific information. Salesforce issues a session “cookie” only to record encrypted authentication information for the duration of a specific session.

Credit Memo

A credit memo is a pricing adjustment that credits your account.

CSV (Comma Separated Values)

A file format that enables the sharing and transportation of structured data. The import wizards, Data Loader and the Bulk API support CSV. Each line in a CSV file represents a record. A comma separates each field value in the record.

CTI Adapter

A lightweight software program that controls the appearance and behavior of a Salesforce softphone. The adapter acts as an intermediary between a third-party computer telephony integration (CTI) system, Salesforce, and a Salesforce CRM Call Center user. It must be installed on any machine that needs access to Salesforce CRM Call Center functionality.

CTI Connector

A component of a computer telephony integration (CTI) adapter that maintains an in-memory representation of a Salesforce CRM Call Center user's softphone, including the phone numbers, records, and status associated with a call. The CTI connector is the component of a CTI adapter that can be customized by an organization.

CTI System

The hardware and software that implements computer-telephony integration (CTI) for a particular call center.

Custom App

See App.

Custom Console Component

A Visualforce page added to a Salesforce console by an administrator to customize, integrate, or extend the capabilities of the console.

Custom Controller

A custom controller is an Apex class that implements all of the logic for a page without leveraging a standard controller. Use custom controllers when you want your Visualforce page to run entirely in system mode, which does not enforce the permissions and field-level security of the current user.

Custom Field

A field that can be added in addition to the standard fields to customize Salesforce for your organization's needs.

Custom Help

Custom text administrators create to provide users with on-screen information specific to a standard field, custom field, or custom object.

Custom Labels

Custom labels are custom text values that can be accessed from Apex classes, Visualforce pages, or Lightning components.

Custom Links

Custom links are URLs defined by administrators to integrate your Salesforce data with external websites and back-office systems. Formerly known as Web links.

Custom Object

Custom records that allow you to store information unique to your organization.

Custom Report Type

See Report Type.

Custom Settings

Custom settings are similar to custom objects and enable application developers to create custom sets of data, as well as create and associate custom data for an organization, profile, or specific user. All custom settings data is exposed in the application cache, which enables efficient access without the cost of repeated queries to the database. This data can then be used by formula fields, validation rules, flows, Apex, and the SOAP API.

See also Hierarchy Custom Settings and List Custom Settings.

Custom S-Control

Note: S-controls have been superseded by Visualforce pages. After March 2010 organizations that have never created s-controls, as well as new organizations, won't be allowed to create them. Existing s-controls will remain unaffected, and can still be edited.

Custom Web content for use in custom links. Custom s-controls can contain any type of content that you can display in a browser, for example a Java applet, an Active-X control, an Excel file, or a custom HTML Web form.

Custom View

A display feature that lets you see a specific set of records for a particular object.

Customer Relationship Management (CRM)

A business strategy for developing and improving relations between companies and their customers.

Customers, Chatter

Users outside of your company's email domains. They have very limited Chatter access and can only see groups they're invited to and interact with members of those groups.

Customizable Forecasting

A revised forecasting module that allows organizations to customize forecasts for their organization's business process.

D

Dashboard

A *dashboard* shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. The components provide a snapshot of key metrics and performance indicators for your organization. Each dashboard can have up to 20 components.

Dashboard Builder

Dashboard builder is a drag-and-drop interface for creating and modifying dashboards.

Dashboard Filters

Filters on a dashboard allow you to choose different views of data.

Data Category for Answers

On the Answers tab, *data categories* allow users to classify questions in an answers zone. For example, if you have a zone for hardware products, your data categories may include laptops, desktops, and printers. Zone members can quickly browse within a specific category to find answers to their questions. Administrators can use data categories to control access to questions.

Data Category for Articles

In Salesforce Knowledge, *data categories* are a set of criteria organized hierarchically into category groups. Articles in the knowledge base can be classified according to multiple categories that make it easy for users to find the articles they need. For example, to classify articles by sales regions and business units, create two category groups, Sales Regions and Business Units. The Sales Regions category group could consist of a geographical hierarchy, such as All Sales Regions as the top level, North America, Europe, and Asia at the second level, and so on up to five levels. Authors assign categories to articles. Administrators can use data categories to control access to articles.

Data Encryption

The process of applying a cryptographic function to data that results in ciphertext. The platform encryption process uses symmetric key encryption and a 256-bit Advanced Encryption Standard (AES) algorithm using CBC mode, PKCS5 padding, and a randomized, 128-bit initialization vector (IV) to encrypt field-level data and files stored on the Salesforce platform. Both data encryption and decryption occur on the application servers.

Data Encryption Keys

Shield Platform Encryption uses data encryption keys to encrypt and decrypt data. Data encryption keys are derived on a key derivation server using keying material split between a per-release master secret and an organization-specific tenant secret stored encrypted in the database as a part of your organization. The 256-bit derived keys exist in memory until evicted from the cache.

Data Loader

A Lightning Platform tool used to import and export data from your Salesforce organization.

Data Manipulation Language (DML)

An Apex method or operation that inserts, updates, or deletes records.

Data State

The structure of data in an object at a particular point in time.

Database

An organized collection of information. The underlying architecture of the Lightning Platform includes a database where your data is stored.

Database Table

A list of information, presented with rows and columns, about the person, thing, or concept you want to track. See also Object.

Database.com

Database.com is an enterprise cloud database from Salesforce.

Date Literal

A keyword in a SOQL or SOSL query that represents a relative range of time such as `last month` or `next year`.

Dated Exchange Rates

Dated exchange rates allow you to map a currency 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 ($1 = 1.42$).

Decimal Places

Parameter for number, currency, and percent custom fields that indicates the total number of digits you can enter to the right of a decimal point, for example, 4.98 for an entry of 2. Note that the system rounds the decimal numbers you enter, if necessary. For example, if you enter 4.986 in a field with `Decimal Places` of 2, the number rounds to 4.99. Salesforce uses the round half-up rounding algorithm. Half-way values are always rounded up. For example, 1.45 is rounded to 1.5. -1.45 is rounded to -1.5 .

Delegated Administration

A security model in which a group of non-administrator users perform administrative tasks.

Delegated Authentication

A security process where an external authority is used to authenticate Lightning Platform users.

Delegated Approver

A delegated approver is a user appointed by an assigned approver as an alternate for approval requests.

Demote

If you dislike an idea, you can click **demote** to subtract 10 points from its overall score and decrease the idea's overall popularity ranking. You cannot demote the same idea more than once, and after you demote an idea you cannot promote it. An idea can have negative overall points if more users demote the idea than promote it.

Dependency

A relationship where one object's existence depends on that of another. There are a number of different kinds of dependencies including mandatory fields, dependent objects (parent-child), file inclusion (referenced images, for example), and ordering dependencies (when one object must be deployed before another object).

Dependent Field

Any custom picklist or multi-select picklist field that displays available values based on the value selected in its corresponding controlling field.

Deploy

To move functionality from an inactive state to active. For example, when developing new features in the Salesforce user interface, you must select the "Deployed" option to make the functionality visible to other users.

The process by which an application or other functionality is moved from development to production.

To move metadata components from a local file system to a Salesforce organization.

For installed apps, deployment makes any custom objects in the app available to users in your organization. Before a custom object is deployed, it is only available to administrators and any users with the “Customize Application” permission.

Deprecated Component

Developers can refine the functionality in a managed package over time as the requirements evolve, such as redesign some of the components in the managed package. Developers can't delete some components in a Managed - Released package, but they can deprecate a component in a later package version so that new subscribers don't receive the component, while the component continues to function for existing subscribers and API integrations.

Detail

A page that displays information about a single object record. The detail page of a record allows you to view the information, whereas the edit page allows you to modify it.

A term used in reports to distinguish between summary information and inclusion of all column data for all information in a report. You can toggle the **Show Details/Hide Details** button to view and hide report detail information.

Detail View

The Agent console's center frame, which is the detail page view of any record selected from any of the console's other frames. The detail view displays the same page layouts defined for the object's detail pages. When a record is displayed in the detail view, it is highlighted in the list view.

Developer Edition

A free, fully-functional Salesforce organization designed for developers to extend, integrate, and develop with the Lightning Platform. Developer Edition accounts are available on developer.salesforce.com.

Salesforce Developers

The Salesforce Developers website at developer.salesforce.com provides a full range of resources for platform developers, including sample code, toolkits, an online developer community, and the ability to obtain limited Lightning Platform environments.

Developer Sandbox

Developer sandboxes copy customization (metadata), but don't copy production data, into a separate environment for coding and testing.

Developer Pro Sandbox

Developer Pro sandboxes copy customization (metadata), but don't copy production data, into a separate environment for coding and testing. Developer Pro has more storage than a Developer sandbox. It includes a number of Developer sandboxes, depending on the edition of your production organization.

Development as a Service (DaaS)

An application development model where all development is on the Web. This means that source code, compilation, and development environments are not on local machines, but are Web-based services.

Development Environment

A Salesforce organization where you can make configuration changes that will not affect users on the production organization. There are two kinds of development environments, sandboxes and Developer Edition organizations.

Dial-Tone Multi-Frequency (DTMF)

The system that informs a switch of the number that is being pressed by a caller in Salesforce CRM Call Center.

Dialed Number Identification Service (DNIS)

The number a caller dialed in Salesforce CRM Call Center.

Direct Inward Dial (DID)

A phone number that allows a Salesforce CRM Call Center user to be reached directly from outside the call center. DIDs can be used in place of extensions, which require a caller to first dial the main private branch exchange number and then enter an extension.

Directory Number (DN)

Any internal number that is configured on a public branch exchange. You can define additional directory numbers through the Salesforce CRM Call Center setup within Salesforce.

Document Library

A place to store documents without attaching them to accounts, contacts, opportunities, or other records.

Draft Article

Draft articles are in-progress articles that have not been published, which means they are not visible on the Articles tab (in any channel) or in a public knowledge base. Article managers can access draft articles on the Article Management tab by clicking the **Articles** tab in the View area and choosing **Draft Articles**. You can filter draft articles by those assigned to you or those assigned to anyone (all draft articles for your organization). Draft articles can be assigned to any user involved in the editorial work.

Draft Translation

Draft translations are in-progress translations of articles into multiple languages. They have not been published, which means they are not visible on the Articles tab (in any channel) or in a public knowledge base. Article managers can access draft translations on the Articles Management tab by clicking the **Translations** tab in the View area and choosing **Draft Translations**. You can filter draft translations by those assigned to you, those assigned to a translation queue, or those assigned to anyone (all draft translations in your organization). Translations can be assigned to any user who can publish Salesforce Knowledge articles.

Dynamic Dashboard

A *dynamic dashboard* runs using the security settings of the user viewing the dashboard. Each user sees the dashboard according to his or her own access level. This approach helps administrators share one common set of dashboard components to users with different levels of access.

Dynamic Visualforce Binding

A way of writing generic Visualforce pages that display information about records without necessarily knowing which fields to show. In other words, fields on the page are determined at runtime, rather than compile time.

E

Email Alert

Email alerts are actions that send emails, using a specified email template, to specified recipients.

Email Approval Response

Email approval response lets users respond to approval requests by replying to an email notification.

Email Notification

An email that's sent when activities happen in Chatter. You can configure the activities that trigger email notifications.

Email Template

A form email that communicates a standard message, such as a welcome letter to new employees or an acknowledgement that a customer service request has been received. Email templates can be personalized with merge fields, and can be written in text, HTML, or custom format.

Encrypted Data at Rest

Data that is encrypted when stored on disk. Salesforce supports encryption for fields stored in the database, documents stored in Files, Content Libraries, and Attachments, and archived data.

Encryption Key

Encryption keys are used by an encryption algorithm to convert plaintext values into ciphertext and back. Platform Encryption uses the AES algorithm and 256-bit symmetric keys with a random IV (Initialization Vector) to encrypt and decrypt data stored at rest on the Salesforce platform.

Encryption Key Management

Refers to all aspects of key management, such as key creation, processes, and storage. Tenant secret management is performed by administrators or users who have the “Manage Encryption Keys” permission, enabled from Setup by clicking **Security Controls** > **Platform Encryption**.

Enterprise Application

An application that is designed to support functionality for an organization as a whole, rather than solving a specific problem.

Enterprise Edition

A Salesforce edition designed for larger, more complex businesses.

Enterprise WSDL

A strongly-typed WSDL for customers who want to build an integration with their Salesforce organization only, or for partners who are using tools like Tibco or webMethods to build integrations that require strong typecasting. The downside of the Enterprise WSDL is that it only works with the schema of a single Salesforce organization because it is bound to all of the unique objects and fields that exist in that organization's data model.

Entitlement

Entitlements help you determine if your customers are eligible for customer support so you can create cases for them. A customer can be eligible for support based on a particular asset, account, or service contract.

Entitlement Contact

Entitlement contacts are contacts specified to receive customer support—for example, a named caller. They're listed on an entitlement's Contacts related list or the contact's Entitlements related list. Entitlement contacts don't have page layouts, search layouts, buttons, links, or record types.

Entitlement Process

Entitlement processes are timelines that include all of the steps (milestones) that your support team must complete to resolve cases. Each process includes the logic necessary to determine how to enforce the correct service level for your customers.

Entitlement Template

Entitlement templates are predefined terms of customer support that you can quickly add to products. For example, you can create entitlement templates for Web or phone support so that users can easily add entitlements to products offered to customers.

Entity Relationship Diagram (ERD)

A data modeling tool that helps you organize your data into entities (or objects, as they are called in the Lightning Platform) and define the relationships between them. ERD diagrams for key Salesforce objects are published in the [SOAP API Developer's Guide](#).

Enumeration Field

An enumeration is the WSDL equivalent of a picklist field. The valid values of the field are restricted to a strict set of possible values, all having the same data type.

Event

An event is an activity that has a scheduled time. For example, a meeting, or a scheduled phone call.

Event Series

A series of events that recur with a regular pattern. For example, a weekly meeting with a customer defined as an event series.

Event Sink, CTI

An object in a computer telephony integration (CTI) connector that receives CTI system events and routes them to other methods for processing.

External Data Source

An external data source specifies how to access an external system. Salesforce Connect uses external data sources to access data that's stored outside your Salesforce organization. Files Connect uses external data sources to access third-party content systems. External data sources have associated external objects, which your users and the Lightning Platform use to interact with the external data and content.

External Lookup Relationship

An external lookup relationship links a child standard, custom, or external object to a parent external object. When you create an external lookup relationship field, the standard External ID field on the parent external object is matched against the values of the child's external lookup relationship field. External object field values come from an external data source.

External Object

External objects behave similarly to custom objects, except that they map to data that's stored outside your Salesforce org. Each external object maps to a data table in a defined external data source, and each external object field maps to a table column. Users and the Lightning Platform use external objects to interact with the external data.

External User

External users are users with Community, Customer Portal, or partner portal licenses.

F

Facet

A child of another Visualforce component that allows you to override an area of the rendered parent with the contents of the facet.

Feature License

A feature license entitles a user to access an additional feature that is not included with his or her user license, such as Marketing or Work.com. Users can be assigned any number of feature licenses.

Feed Attachment, Chatter

A feed attachment is a file or link that is attached to a post in a Chatter feed.

Feed Filter, Chatter

Feed filters display a subset of posts in your Chatter feed on the Chatter tab.

Feed Tracking, Chatter

Administrator settings that determine which records can be followed and which fields can be tracked in Chatter feeds. Enabling an object for feed tracking allows people to follow records of that object type. Enabling fields for feed tracking allows users to see updates on the Chatter feed when those fields are changed on records they follow.

Field

A part of an object that holds a specific piece of information, such as a text or currency value.

Field-Level Help

Custom help text that you can provide for any standard or custom field. It displays when users hover a mouse over the help icon adjacent to that field.

Field-Level Security

Settings that determine whether fields are hidden, visible, read only, or editable for users. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.

Field Dependency

A filter that allows you to change the contents of a picklist based on the value of another field.

Field Sets

A field set is a grouping of fields. For example, you could have a field set that contains fields describing a user's first name, middle name, last name, and business title. Field sets can be referenced on Visualforce pages dynamically. If the page is added to a managed package, administrators can add, remove, or reorder fields in a field set to modify the fields presented on the Visualforce page without modifying any code.

Field Update

A field update is an action that automatically updates a field with a new value.

File Collaborator


Users with the “collaborator” permission can view, download, share, change permission, edit the file, and upload new versions of files in Chatter.

File Owner


You are the owner of a file when you upload the file in Chatter, attach the file to a Chatter feed, or upload the file in Salesforce CRM Content.

As the owner of the file you can view, edit, download, share, upload a new version, and delete the file, as well as make the file private and change the permission on the file.

File, Private

A private file in Chatter is indicated by the private icon () and is only available to the file owner and isn't shared with anyone. A private file is created when you upload a file on the Files tab or contribute a file to a Salesforce CRM Content personal library. You own files you upload or contribute.

File, Privately Shared

A privately shared file in Chatter is indicated by the privately shared icon () and is only available to the file owner and the specific people or groups it has been shared with.

File Viewer

Users with the “viewer” permission can view, download, and share files in Chatter.

File, Your Company

The your company icon () indicates a file that is shared with all Chatter users in your company. All Chatter users in your company can find and view this file.

Files Tab

A tab that lists a user's Chatter and Salesforce CRM Content files.

Filter Condition/Criteria

Condition on particular fields that qualifies items to be included in a list view or report, such as “State equals California.”

Final Approval Actions

Final approval actions occur when all required approvals have been given for a record.

Final Rejection Actions

A final rejection action occurs when an approver rejects the request and it goes to the final rejection state.

Fiscal Year

A period that an organization uses for financial planning purposes, such as forecasting, whose length is usually similar to the length of a calendar year. Fiscal years usually contain smaller fiscal periods, such as quarters or trimesters.

Flag

An icon that users can click on a question or reply to report it as spam, hateful, or inappropriate.

Flex Toolkit for Lightning Platform

An Adobe® Flex library that allows you to access Salesforce data from within a Flex 2 application.

Flow

A *flow* is an application that can execute logic, interact with the Salesforce database, call Apex classes, and collect data from users. You can build flows by using the Cloud Flow Designer.

Flow Interview

A *flow interview* is a running instance of a flow.

Flow Trigger

A *flow trigger* is a workflow action that launches a flow. With flow triggers, you can automate complex business processes—create flows to perform logic, and have events trigger the flows via workflow rules—without writing code. For example, your flow looks

up and assigns the relevant entitlement for a case. Create a flow trigger to launch the flow whenever a case is created, so that all new cases are automatically set with a default entitlement.

Folder

A *folder* is a place where you can store reports, dashboards, documents, or email templates. Folders can be public, hidden, or shared, and can be set to read-only or read/write. You control who has access to its contents based on roles, permissions, public groups, and license types. You can make a folder available to your entire organization, or make it private so that only the owner has access.

Follow

A subscription to a user or record that lets you see related updates in your Chatter feed. Follow a user to see the users's posts. Follow a record to see posts, comments, and field changes.

Follow, Chatter Answers

A subscription to a question that lets you receive emails when someone answers or comments on a specific question.

Lightning Platform

The Salesforce platform for building applications in the cloud. Lightning Platform combines a powerful user interface, operating system, and database to allow you to customize and deploy applications in the cloud for your entire enterprise.

Lightning Platform App Menu

A menu that enables users to switch between customizable applications (or "apps") with a single click. The Lightning Platform app menu displays at the top of every page in the user interface.

Lightning Platform Builder

The App Setup area of the Salesforce setup menu.

Lightning Platform Enterprise App

A custom app with up to eight (8) custom objects and eight (8) custom tabs, read-write access to accounts and contacts, and access to Sharing, Bulk API, or Streaming API.

Force.com IDE

An Eclipse plug-in that allows developers to manage, author, debug and deploy Lightning Platform applications in the Eclipse development environment.

Lightning Platform Light App

A custom app with up to eight (8) custom objects and eight (8) custom tabs, read-only access to accounts and contacts, and no access to Sharing, Bulk API, or Streaming API.

Forecast Amount

Applies to Collaborative Forecasts. 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

Determines the category to which an opportunity is attributed in a forecast. The default category setting for an opportunity is tied to its stage, as set in the `Stage` picklist. To update the `Forecast Category` for a particular opportunity, you must edit that opportunity's forecast.

Forecast User

A user who can see and work with forecasts below them in either the forecast hierarchy or territory hierarchy.

Forecast Quantity

Applies to Collaborative Forecasts. The quantity forecast from the forecast manager's perspective and the sum of the owner's and subordinates' opportunities, including all forecast adjustments.

Forecasts

Projections of sales based on the organization's fiscal year.

Foreign Key

A field whose value is the same as the primary key of another table. You can think of a foreign key as a copy of a primary key from another table. A relationship is made between two tables by matching the values of the foreign key in one table with the values of the primary key in another.

Formula Field

A type of custom field. Formula fields automatically calculate their values based on the values of merge fields, expressions, or other values.

Full Sandbox

Full sandboxes copy your entire production organization and all its data, including standard and custom object records, documents, and attachments. Use the sandbox to code and test changes, and to train your team about the changes. You can refresh a Full sandbox every 29 days.

Function

Built-in formulas that you can customize with input parameters. For example, the DATE function creates a date field type from a given year, month, and day.

G

Generate Orders

The Generate Orders package is a set of flow templates that you install and customize to help your sales teams automatically create orders with order products from opportunities or quotes. These templates also let sales reps generate contracts and relate orders to those contracts.

Get Request

A get request is made when a user initially requests a Visualforce page, either by entering a URL or clicking a link or button.

Getter Methods

Methods that enable developers to display database and other computed values in page markup.

Methods that return values. See also Setter Methods.

Global Search

Search more records and fields in Salesforce from the header search box. Global search keeps track of which objects you use and how often you use them, and arranges the search results accordingly. Search results for the objects you use most frequently appear at the top of the list.

Global Variable

A special merge field that you can use to reference data in your organization.

A method access modifier for any method that needs to be referenced outside of the application, either in the SOAP API or by other Apex code.

Gmail

A free Web-based email service from Google that operates on all standard browsers and can be used with your company's domain. Also known as Google Mail.

Google Apps

Google Apps™ is a suite of on-demand communication and collaboration services hosted by Google and designed for business users. Salesforce integrates key Google Apps services and provides several AppExchange apps that enhance and customize Google-related functionality.

Google Docs

Google Docs™ allows you to create on-demand documents, spreadsheets, and presentations, edit them in your browser, and work together in real time with other collaborators.

Google Talk

Google Talk™ is Google's instant-messaging tool. When the Google Talk Sidebar Component is activated in Salesforce, Google Talk displays in the sidebar where it can be toggled on, off, or expanded into its own window. You can also log a chat record as an activity on a Salesforce lead or contact record.

Governor Limits

Apex execution limits that prevent developers who write inefficient code from monopolizing the resources of other Salesforce users.

Gregorian Year

A calendar based on a 12-month structure used throughout much of the world.

Group

A group is a set of users. Groups can contain individual users, other groups, or the users in a role. Groups can be used to help define sharing access to data or to specify which data to synchronize in Salesforce for Outlook configurations or Lightning Sync configurations.

Users can define their own personal groups. Administrators can create public groups for use by everyone in the organization.

Group Edition

A product designed for small businesses and workgroups with a limited number of users.

Group Task

A task that was assigned to multiple users when it was created. Note that group tasks are independent records that are not linked; they can be edited, transferred, or deleted individually.

Guest User

Guest users can access public Site.com and Salesforce sites, and public pages in Communities, via the Guest User license associated with each site or community. Guest users' access to objects and data is controlled by public access settings on the Guest User profile.

H

Half-life

The half-life setting determines how quickly old ideas drop in ranking on the Popular Ideas subtab, to make room for ideas with more recent votes. A shorter half-life moves older ideas down the page faster than a longer half-life. This setting affects all zones in your organization.

Hardware Security Module (HSM)

Used to provide cryptography processing as well as key management for authentication. Shield Platform Encryption uses HSMs to generate and store secret material and run the function that derives data encryption keys used by the encryption service to encrypt and decrypt data.

Hierarchy Custom Settings

A type of custom setting that uses a built-in hierarchical logic that lets you "personalize" settings for specific profiles or users. The hierarchy logic checks the organization, profile, and user settings for the current user and returns the most specific, or "lowest," value. In the hierarchy, settings for an organization are overridden by profile settings, which, in turn, are overridden by user settings.

Highlights Panel

A customizable table of up to four columns and two rows that appears at the top of every primary tab in a Salesforce console. It lets you view key information about records at a glance.

High-Volume Portal Users

Limited-access users intended for organizations with many thousands to millions of portal users. Unlike other users, high-volume portal users don't have roles, which eliminates performance issues associated with role hierarchy calculations. High-volume portal users include both the High Volume Customer Portal User and Authenticated Website User license types.

Home Organization

The organization used for retrieving components to a local file system. If using the Force.com IDE, the home organization is the organization used to create a project. If using the Ant Migration Tool, the home organization is the server you specify in `build.properties` when you retrieve components.

Home Tab

Starting page from which users can choose sidebar shortcuts and options, view current tasks and activities, or select another tab.

Hover Detail

Hover detail displays an interactive overlay containing record details. Details appear when users hover over a link to that record in the Recent Items list on the sidebar, or in a lookup field on a record detail page. Users can quickly view information about a record before clicking to view or edit the record. The record's mini page layout determines which fields are included in the hover details. Users can't customize which fields appear.

HTML S-Control



Note: S-controls have been superseded by Visualforce pages. After March 2010 organizations that have never created s-controls, as well as new organizations, won't be allowed to create them. Existing s-controls will remain unaffected, and can still be edited.

An s-control that contains the actual HTML that should be rendered on a page. When saved this way, the HTML is ultimately hosted on a platform server, but is executed in an end-user's browser.

HTTP Debugger

An application that can be used to identify and inspect SOAP requests that are sent from the AJAX Toolkit. They behave as proxy servers running on your local machine and allow you to inspect and author individual requests.

I

ID

See Salesforce Record ID.

Idea

Ideas are suggestions posted by the members of an ideas community and are organized by zones. For example, if the focus of a particular zone is "Ideas for car features," an appropriate idea for that zone might have the title "Insulated cup holders that keep your beverage hot or cold." Or, if the focus of a particular zone is "Ideas for our company's employee benefits," an appropriate idea for that zone might have the title "On-site day care."

IdeaExchange

A forum where Salesforce customers can suggest new product concepts, promote favorite enhancements, interact with product managers and other customers, and preview what Salesforce is planning to deliver in future releases. Visit IdeaExchange at ideas.salesforce.com.

Idea Themes

Idea Themes lets you invite community members to post ideas about specific topics so that members can solve problems or propose innovations for your company. For example, to engage with your community and create excitement around the launch of a new product, you can ask community members to work together to create the product's name. Community members collaborate and add ideas to the idea theme, while you monitor their activities as they vote and comment on each other's ideas until they find a winner.

Immediate Action

A workflow action that executes instantly when the conditions of a workflow rule are met.

Import Wizard

A tool for importing data into your Salesforce organization, accessible from Setup.

Inbound Call

A call that originates from another party in Salesforce CRM Call Center.

Indirect Lookup Relationship

An indirect lookup relationship links a child external object to a parent standard or custom object. When you create an indirect lookup relationship field on an external object, you specify the parent object field and the child object field to match and associate records in the relationship. Specifically, you select a custom unique, external ID field on the parent object to match against the child's indirect lookup relationship field, whose values come from an external data source.

Influence, Chatter

An indicator of a person's influence in Chatter. The number of posts and comments the person makes, and the number of comments and likes the person receives determine the level of influence.

- Top Influencers lead collaboration efforts by regularly sharing essential content.
- Active Influencers encourage others to get involved and share knowledge.
- Observers are quiet participants or just getting started in Chatter.


Initial Submission Actions

An initial submission action occurs when a user first submits a record for approval. By default, the record is locked.

Initialization Vector (IV)

A random sequence used with a key to encrypt data.

Inline S-Control

 **Note:** S-controls have been superseded by Visualforce pages. After March 2010 organizations that have never created s-controls, as well as new organizations, won't be allowed to create them. Existing s-controls will remain unaffected, and can still be edited.

An s-control that displays within a record detail page or dashboard, rather than on its own page.

Installed Product

An installed product is a product purchased through Checkout and installed in your organization.

Instance

The cluster of software and hardware represented as a single logical server that hosts an organization's data and runs their applications. The Lightning Platform runs on multiple instances, but data for any single organization is always stored on a single instance.

Integrated Development Environment (IDE)

A software application that provides comprehensive facilities for software developers including a source code editor, testing and debugging tools, and integration with source code control systems.

Integration Testing

An intermediate phase of software testing in which individual projects are combined and tested as a group. Integration testing follows unit testing and precedes system testing.

Integration User

A Salesforce user defined solely for client apps or integrations. Also referred to as the logged-in user in a SOAP API context.

Interaction Log

An area in a Salesforce console where you can jot notes about the main record you're working on without clicking a button, viewing a new tab, or scrolling to the Notes & Attachments related list. Interaction logs are archived on the Activity History related list for easy review and retrieval. Administrators can customize interaction logs to include task fields.

Interactive Voice Response (IVR)

The hardware and software that prompts a Salesforce CRM Call Center caller to enter specific digits, such as a menu selection, or an account number. IVR is also known as a Voice Response Unit (VRU).

Internal Call

A call between users in the same call center in Salesforce CRM Call Center.

Interview

See [Flow Interview](#).

Invoice

An invoice is a printable statement in Checkout that lists all products and charges for an order.

ISO Code

The International Organization for Standardization country code, which represents each country by two letters.

J

Job, Bulk API

A job in the Bulk API specifies which object is being processed (for example, Account, Opportunity) and what type of action is being used (insert, upsert, update, or delete). You process a set of records by creating a job that contains one or more batches. See Batch, Bulk API.

JSON (JavaScript Object Notation)

JSON is a lightweight format for transferring data.

Junction Object

A custom object with two master-detail relationships. Using a custom junction object, you can model a “many-to-many” relationship between two objects. For example, you create a custom object called “Bug” that relates to the standard case object such that a bug could be related to multiple cases and a case could also be related to multiple bugs.

K

Key Derivation Function (KDF)

Uses a pseudorandom number generator and input such as a password to derive keys. Shield Platform Encryption uses PBKDF2 (Password-based Key Derivation Function 2) with HMAC-SHA-256.

Key Pair

See Salesforce Certificate and Key Pair.

Key Tenant Secret Rotation

The process of generating a new tenant secret and archiving the previously active one. Active tenant secrets are used for both encryption and decryption. Archived ones are used only for decryption until all data has been re-encrypted using the new, active tenant secret.

Knowledge Agent

Salesforce uses the term *knowledge agent* to represent a specific type of user. Knowledge agents are article consumers in the internal Salesforce Knowledge app. These users can access the Articles tab to search for and view articles, but they cannot create, edit, or manage articles.

Knowledge Sidebar

A sidebar in a Salesforce console that displays titles of Salesforce Knowledge articles that may solve the case you're working on. It automatically searches and returns articles from your knowledge base that match any of the words you type in the `Subject` of a case. The sidebar only displays for Salesforce Knowledge users after administrators set it up.

L

Layout

See Page Layout.

Lead

A *lead* is a sales prospect who has expressed interest in your product or company.

Length

Parameter for custom text fields that specifies the maximum number of characters (up to 255) that a user can enter in the field.

Parameter for number, currency, and percent fields that specifies the number of digits you can enter to the left of the decimal point, for example, 123.98 for an entry of 3.

Letterhead

Determines the basic attributes of an HTML email template. Users can create a letterhead that includes attributes like background color, logo, font size, and font color.

Library

A file repository in Salesforce CRM Content.

Library Permission

A group of privileges that determines user access within a Salesforce CRM Content library.

License Management Application (LMA)

A free AppExchange app that allows you to track sales leads and accounts for every user who downloads your managed package (app) from the AppExchange.

License Management Organization (LMO)

The Salesforce organization that you use to track all the Salesforce users who install your package. A license management organization must have the License Management Application (LMA) installed. It automatically receives notification every time your package is installed or uninstalled so that you can easily notify users of upgrades. You can specify any Enterprise, Unlimited, Performance, or Developer Edition organization as your license management organization. For more information, go to <http://www.salesforce.com/docs/en/lma/index.htm>.

Lightning for Gmail

An app that integrates Gmail and Salesforce that's available in the Chrome Web Store. With the app, view or create relevant Salesforce records without leaving your Google email application.

Lightning for Outlook

An app that integrates Microsoft® email and Salesforce that's available in the Microsoft Office Store. With the app, view or create relevant Salesforce records without leaving your Microsoft email application.

Lightning Knowledge

Lightning Knowledge lets you create and manage your very own Knowledge base in Lightning Experience.

Lightning Sync

The sync component for Lightning for Outlook. Syncs contacts and events between Microsoft® Exchange servers and Salesforce.

Like

To show support for a post or comment in a Chatter feed. When you like a post or comment, you receive email notifications for subsequent comments.

Like, Chatter Answers

To show support or indicate quality or usefulness for a question, answer, or knowledge article.

List Custom Settings

A type of custom setting that provides a reusable set of static data that can be accessed across your organization. If you use a particular set of data frequently within your application, putting that data in a list custom setting streamlines access to it. Data in list settings does not vary with profile or user, but is available organization-wide. Examples of list data include two-letter state abbreviations, international dialing prefixes, and catalog numbers for products. Because the data is cached, access is low-cost and efficient: you don't have to use SOQL queries that count against your governor limits.

List Price

The price of a product in a custom price book.

List View

A list display of items (for example, accounts or contacts) based on specific criteria. Salesforce provides some predefined views.

In the Agent console, the list view is the top frame that displays a list view of records based on specific criteria. The list views you can select to display in the console are the same list views defined on the tabs of other objects. You cannot create a list view within the console.

Live Agent

Live Agent lets service organizations connect with customers or website visitors in real time through a Web-based, text-only live chat.

Live Agent Console

The Live Agent console is a dedicated console used by customer service agents to manage Live Agent chats. Agents can answer chat requests, conduct live chats, and interact with Salesforce records and Salesforce Knowledge articles.

Local Name

The value stored for the field in the user's or account's language. The local name for a field is associated with the standard name for that field.

Local Project

A `.zip` file containing a project manifest (`package.xml` file) and one or more metadata components.

Locale

The country or geographic region in which the user is located. The setting affects the format of date and number fields, for example, dates in the English (United States) locale display as 06/30/2000 and as 30/06/2000 in the English (United Kingdom) locale.

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, a user's individual `Locale` setting overrides the organization's `Default Locale` setting. In Personal and Group Editions, the organization-level locale field is called `Locale`, not `Default Locale`.

Logged-in User

In a SOAP API context, the username used to log into Salesforce. Client applications run with the permissions and sharing of the logged-in user. Also referred to as an integration user.

Long Text Area

Data type of custom field that allows entry of up to 32,000 characters on separate lines.

Lookup Dialog

Popup dialog available for some fields that allows you to search for a new item, such as a contact, account, or user.

Lookup Field

A type of field that contains a linkable value to another record. You can display lookup fields on page layouts where the object has a lookup or master-detail relationship with another object. For example, cases have a lookup relationship with assets that allows users to select an asset using a lookup dialog from the case edit page and click the name of the asset from the case detail page.

Lookup Filter

An administrator setting on a lookup or master-detail relationship field that specifies the criteria records must meet to be valid values for the field. Invalid records do not appear in the lookup results. If a user manually types the name of an invalid record and clicks **Save**, Salesforce blocks the save and displays an error message.

Lookup Icon

A magnifying glass icon that displays next to certain fields and launches the lookup dialog window.

Lookup Relationship

A relationship between two records so you can associate records with each other. For example, cases have a lookup relationship with assets that lets you associate a particular asset with a case. On one side of the relationship, a lookup field allows users to click a lookup icon and select another record from a popup window. On the associated record, you can then display a related list to show all of the records that have been linked to it. If a lookup field references a record that has been deleted, by default Salesforce clears the lookup field. Alternatively, you can prevent records from being deleted if they're in a lookup relationship.

M

Mail Merge

A mail merge is the process of generating form letters and other Microsoft® Word documents that are personalized for the recipient, who is often a contact or lead. The content of each document is predefined in a mail merge template. Mail merge templates include variables called merge fields where data from your Salesforce records—for example a contact's name and address—displays in the generated document.

Major Release

A significant release of a package. During these releases, the major and minor numbers of a package version increase to any chosen value.

Managed Package

A collection of application components that is posted as a unit on the AppExchange and associated with a namespace and possibly a License Management Organization. To support upgrades, a package must be managed. An organization can create a single managed package that can be downloaded and installed by many different organizations. Managed packages differ from unmanaged packages by having some locked components, allowing the managed package to be upgraded later. Unmanaged packages do not include locked components and cannot be upgraded. In addition, managed packages obfuscate certain components (like Apex) on subscribing organizations to protect the intellectual property of the developer.

Managed Package Extension

Any package, component, or set of components that adds to the functionality of a managed package. You cannot install an extension before installing its managed package.

Manifest File

The project manifest file (`package.xml`) lists the XML components to retrieve or deploy when working with the Metadata API, or clients built on top of the Metadata API, such as the Force.com IDE or the Ant Migration Tool.

Manual Sharing

Record-level access rules that allow record owners to give read and edit permissions to other users who might not have access to the record any other way.

Many-to-Many Relationship

A relationship where each side of the relationship can have many children on the other side. Many-to-many relationships are implemented through the use of junction objects.

Marketing User

One or more individuals in your organization who can manage campaigns. Administrators can designate someone as a Marketing User by selecting the `Marketing User` checkbox in the user's personal information.

Only marketing users can create, edit, and delete campaigns or configure advanced campaign setup.

With additional user permissions, marketing users can use the Data Import Wizard to add campaign members and update their statuses.

Master-Detail Relationship

A relationship between two different types of records that associates the records with each other. For example, accounts have a master-detail relationship with opportunities. This type of relationship affects record deletion, security, and makes the lookup relationship field required on the page layout.

Master Flow

A master flow is a flow that contains a subflow element. The term “master” is used to distinguish it from the flow that is referenced and called by the subflow element.

Master HSM

The master HSM consists of a USB device used to generate secure, random secrets each Salesforce release. The master HSM is “air-gapped” from Salesforce’s production network and stored securely in a bank safety deposit box.

Master Picklist

A complete list of picklist values available for a record type or business process.

Matrix Report

Matrix reports are similar to summary reports but allow you to group and summarize data by both rows and columns. They can be used as the source report for dashboard components. Use this type for comparing related totals, especially if you have large amounts of data to summarize and you need to compare values in several different fields, or you want to look at data by date *and* by product, person, or geography.

Meeting Request

See Requested Meeting.

Master Secret

Used in conjunction with the tenant secret and key derivation function to generate a derived data encryption key. The master secret is updated each release by Salesforce and encrypted using the per-release master wrapping key, which is in turn encrypted with the Key Derivation Servers' public key so it can be stored encrypted on the file system. Only HSMs can decrypt it. *No Salesforce employees have access to these keys in cleartext.*

Master Wrapping Key

A symmetric key is generated and used as a master wrapping key, also known as a key wrapping key, encrypting all the per-release keys and secrets bundle.

Member Status

The status of a lead or contact in relation to a campaign. For example, a lead or contact could have a member status of “Planned,” “Sent,” or “Responded” at different stages of an email campaign.

@Mention

An @mention (or at mention) is the @ symbol followed by a person’s or group’s name, for example, **@Bob Smith** or **@DocTeam**. You can @mention people in Chatter posts and comments. When you @mention someone, the @mention links to their profile, the post or comment displays in their feed, and they are emailed a notification.

Merge Field

A merge field is a field you can put in an email template, mail merge template, custom link, or formula to incorporate values from a record. For example, `Dear {!Contact.FirstName},` uses a contact merge field to obtain the value of a contact record's `First Name` field to address an email recipient by his or her first name.

Message, Chatter

A Chatter message is a private communication with other Chatter users. Use messages to send your manager a question privately, or to communicate with a few select people when a discussion isn't relevant to everyone you work with. Messages don't appear in your feed, your profile, or any other part of Chatter that's publicly visible.

Metadata

Information about the structure, appearance, and functionality of an organization and any of its parts. Lightning Platform uses XML to describe metadata.

Metadata Component

An instance of a metadata type. For example, the Account standard object is a metadata component, which is an instance of the CustomObject type.

Metadata-Driven Development

An app development model that allows apps to be defined as declarative “blueprints,” with no code required. Apps built on the platform—their data models, objects, forms, workflows, and more—are defined by metadata.

Metadata Type

A type of object in a Salesforce organization, for example CustomObject or CustomTab.

Metadata WSDL

A WSDL for users who want to use the Lightning Platform Metadata API calls.

Migration

The process of moving metadata from one organization to another, usually between two development environments. See also Deploy.

Milestone

Milestones are required steps in your support process. They're metrics that represent service levels to provide to each of your customers. Examples of milestones include First Response and Resolution Times on cases.

Milestone Actions

Milestone actions are time-dependent workflow actions that occur at every step (milestone) in an entitlement process. Examples of milestone actions include sending email alerts to specified users an hour before a first response is near violation or automatically updating certain fields on a case one minute after a first response successfully completes.

Mini Page Layout

A subset of the items in a record's existing page layout that administrators choose to display in the Agent console's Mini View and in Hover Details. Mini page layouts inherit record type and profile associations, related lists, fields, and field access settings from the page layout.

Mini View

The Agent console's right frame which displays the records associated with the record displayed in the detail view. The fields displayed in the mini view are defined in the mini page layouts by an administrator. The mini view does not display if the record in the detail view does not have any records associated with it.

Mobile Configuration

A set of parameters that determines the data Salesforce transmits to users' mobile devices, and which users receive that data on their mobile devices. Organizations can create multiple mobile configurations to simultaneously suit the needs of different types of mobile users.

Multitenancy

An application model where all users and apps share a single, common infrastructure and code base.

Multi-Person Event

A planned event to which multiple users are invited, also referred to as a meeting. You can create multi-person events by inviting other users to any calendar event you create.

Multi-Select Picklist

See Picklist (Multi-Select).

MVC (Model-View-Controller)

A design paradigm that deconstructs applications into components that represent data (the model), ways of displaying that data in a user interface (the view), and ways of manipulating that data with business logic (the controller).

My Settings

When the improved Setup user interface is enabled in an organization and the user has Salesforce Classic, personal settings are available from the My Settings menu under the user's name.

N

Named Credential

A named credential specifies the URL of a callout endpoint and its required authentication parameters in one definition. A named credential can be specified as an endpoint to simplify the setup of authenticated callouts.

Namespace

In a packaging context, a one- to 15-character alphanumeric identifier that distinguishes your package and its contents from packages of other developers on AppExchange, similar to a domain name. Salesforce automatically prepends your namespace prefix, followed by two underscores ("__"), to all unique component names in your Salesforce organization.

Namespace Prefix

In a packaging context, a namespace prefix is a one to 15-character alphanumeric identifier that distinguishes your package and its contents from packages of other developers on AppExchange. Namespace prefixes are case-insensitive. For example, ABC and abc are not recognized as unique. Your namespace prefix must be globally unique across all Salesforce organizations. It keeps your managed package under your control exclusively.

Native App

An app that is built exclusively with setup (metadata) configuration on Lightning Platform. Native apps do not require any external services or infrastructure.

Navigation Tab

A tab with a drop-down button in a Salesforce console that lets you select and view object home pages.

New Business Quote

A new business quote is a type of quote for a new customer who has a trial version of Salesforce and would like to purchase Salesforce seats and other related products.

Nickname

A nickname is the name used to identify this user in a community. Up to 40 alphanumeric characters are allowed. Standard users can edit this field.

Notes

Miscellaneous information pertaining to a specific record.

O

Object

An object allows you to store information in your Salesforce organization. The object is the overall definition of the type of information you are storing. For example, the case object allow you to store information regarding customer inquiries. For each object, your organization will have multiple records that store the information about specific instances of that type of data. For example, you might have a case record to store the information about Joe Smith's training inquiry and another case record to store the information about Mary Johnson's configuration issue.

Object-Level Help

Custom help text that you can provide for any custom object. It displays on custom object record home (overview), detail, and edit pages, as well as list views and related lists.

Object-Level Security

Settings that allow an administrator to hide whole objects from users so that they don't know that type of data exists. Object-level security is specified with object permissions.

OData Producer

An OData producer is a remote data service that uses the Open Data Protocol (OData) to expose data that's stored on an external server. With the Salesforce Connect feature, you define external data sources to connect Salesforce to OData producers, and you define external objects to map to the external data.

Omni-Channel

Omni-Channel is a comprehensive customer service solution that lets your call center route any type of incoming work item—including cases, chats, or leads—to the most qualified, available agents in your organization.

On-Demand Document

Documents that are hosted by an application service provider and accessed via the Internet. Google's Google Docs service provides on-demand documents.

onClick JavaScript

JavaScript code that executes when a button or link is clicked.

One-to-Many Relationship

A relationship in which a single object is related to many other objects. For example, an account may have one or more related contacts.

Open CTI

An application programming interface that lets developers build CTI (computer-telephony integration) systems that integrate with Salesforce without the use of CTI adapters or client applications.

Operator

An operator is an item used to narrow or broaden a search. In most Salesforce searches, AND, OR, AND NOT, parentheses (), and quotation marks " " can be used as operators.

Opportunities

Opportunities track your sales and pending deals.

Opportunity Team

An opportunity team is a set of users that normally work together on sales opportunities. A typical opportunity team might include the account manager, the sales representative, and a pre-sales consultant. You can specify the opportunity team for each opportunity that you own.

Order

An order is a transaction indicating that you have agreed to purchase specific products and services from Salesforce. For example, an order could be for a seat, training course, or professional services.

Organic Search Leads

Organic search lead is a specific lead source indicating that the lead was generated when a user, who arrived at your website by way of an unpaid (organic) listing on a major search engine, filled out the Web-to-Lead form containing the Salesforce tracking code. The lead source details contain the search engine and the search phrase for each organic lead.

Organization

A deployment of Salesforce with a defined set of licensed users. An organization is the virtual space provided to an individual customer of Salesforce. Your organization includes all of your data and applications, and is separate from all other organizations.

Org

An org is an abbreviation of organization as it pertains to a deployment of Salesforce with a defined set of licensed users. An org is the virtual space provided to an individual customer of Salesforce. Your org includes all of your data and applications, and is separate from all other orgs.

Organization-Wide Defaults

Settings that allow you to specify the baseline level of data access that a user has in your organization. For example, you can set organization-wide defaults so that any user can see any record of a particular object that is enabled via their object permissions, but they need extra permissions to edit one.

Organization-Wide Address

An organization-wide address allows you to associate a single email address as an alias for all users within a user profile.

Outbound Call

Any call that originates from a user to a number outside of a call center in Salesforce CRM Call Center.

Outbound Message

An outbound message sends information to a designated endpoint, like an external service. Outbound messages are configured from Setup. You must configure the external endpoint and create a listener for the messages using the SOAP API.

Overlay

An overlay displays additional information when you hover your mouse over certain user interface elements. Depending on the overlay, it will close when you move your mouse away, click outside of the overlay, or click a close button.

Owner

Individual user to which a record (for example, a contact or case) is assigned.

Owner Only Amount

Applies to Collaborative Forecasts. The sum of a person's revenue opportunities, without adjustments.

Owner Only Quantity

Applies to Collaborative Forecasts. The sum of a person's quantity opportunities, without adjustments.

P

PaaS

See Platform as a Service.

Package

A group of Lightning Platform components and applications that are made available to other organizations through the AppExchange. You use packages to bundle an app along with any related components so that you can upload them to AppExchange together.

Package Dependency

This is created when one component references another component, permission, or preference that is required for the component to be valid. Components can include but are not limited to:

- Standard or custom fields
- Standard or custom objects
- Visualforce pages
- Apex code

Permissions and preferences can include but are not limited to:

- Divisions
- Multicurrency

- Record types

Package Installation

Installation incorporates the contents of a package into your Salesforce organization. A package on the AppExchange can include an app, a component, or a combination of the two. After you install a package, you may need to deploy components in the package to make it generally available to the users in your organization.

Package Publication

Publishing your package makes it publicly available on the AppExchange.

Package Version

A package version is a number that identifies the set of components uploaded in a package. The version number has the format *majorNumber.minorNumber.patchNumber* (for example, 2.1.3). The major and minor numbers increase to a chosen value during every major release. The *patchNumber* is generated and updated only for a patch release.

Unmanaged packages are not upgradeable, so each package version is simply a set of components for distribution. A package version has more significance for managed packages. Packages can exhibit different behavior for different versions. Publishers can use package versions to evolve the components in their managed packages gracefully by releasing subsequent package versions without breaking existing customer integrations using the package. See also Patch and Patch Development Organization.

Page Layout

Page layout is the organization of fields, custom links, and related lists on a record detail or edit page. Use page layouts primarily for organizing pages for your users. In Professional, Enterprise, Unlimited, Performance, and Developer Editions, use field-level security to restrict users' access to specific fields.

Parent Account

An organization or company that an account is affiliated. By specifying a parent for an account, you can get a global view of all parent/subsidiary relationships using the **View Hierarchy** link.

Parent Category

The category directly above the category to which a solution belongs.

Partial Copy Sandbox

A Partial Copy sandbox is a Developer sandbox plus the data that you define in a sandbox template.

Partial Page

An AJAX behavior where only a specific portion of a page is updated following some user action, rather than a reload of the entire page.

Partner

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. Selecting a partner role automatically creates a reverse partner relationship with the associated account so that both accounts list the other account as a partner.

Partner Accounts

Partner accounts are Salesforce accounts that a channel manager uses to manage partner organizations, partner users, and activities when using a partner community or a partner portal.

Partner Portal

Partner portal allows partner users to log in to Salesforce through a Web portal rather than through Salesforce.

Partner Role

Selection for an account on the Partners related list of an individual account or opportunity that specifies the role that the account has in related sales deals.

Partner User

Partner users are Salesforce users with limited capabilities. They are external to your organization but sell your products or services through indirect sales channels. They are associated with a particular partner account, have limited access to your organization's data, and log in via a partner portal.

Partner WSDL

A loosely-typed WSDL for customers, partners, and ISVs who want to build an integration or an AppExchange app that can work across multiple Salesforce organizations. With this WSDL, the developer is responsible for marshaling data in the correct object representation, which typically involves editing the XML. However, the developer is also freed from being dependent on any particular data model or Salesforce organization. Contrast this with the Enterprise WSDL, which is strongly typed.

Patch

A patch enables a developer to change the functionality of existing components in a managed package, while ensuring subscribing organizations that there are no visible behavior changes to the package. For example, you can add new variables or change the body of an Apex class, but you may not add, deprecate, or remove any of its methods. Patches are tracked by a *patchNumber* appended to every package version. See also Patch Development Organization and Package Version.

Patch Development Organization

The organization where patch versions are developed, maintained, and uploaded. Patch development organizations are created automatically for a developer organization when they request to create a patch. See also Patch and Package Version.

Patch Release

A minor upgrade to a managed package. During these releases, the patch number of a package version increments.

Payment

A payment is an amount of money that was paid toward your account. Checkout shows all payments made for orders placed by users within your organization.

People

Users in your Salesforce organization. A list of people is available on the People tab in Chatter.

Percent (%) Quota

For forecasting versions where quotas are available, this is the calculated value in forecasts that indicates what percentage of the quota a salesperson is confident of closing. This amount is the *Commit Amount* divided by the *Quota*.

Performance Edition

Performance Edition is designed for customers that need to drive amazing growth, achieve new levels of customer satisfaction, and maximize sales and service success in the social and mobile world. For customers in Japan, Singapore, and South Korea, we offer Performance Edition Limited, which includes all Performance Edition functionality except Data.com.

Permission

A permission is a setting that allows a user to perform certain functions in Salesforce. Permissions can be enabled in permission sets and profiles. Examples of permissions include the "Edit" permission on a custom object and the "Modify All Data" permission.

Permission Set

A collection of permissions and settings that gives users access to specific tools and functions.

Permission Set License

Permission set licenses incrementally entitle users to access features that are not included in their user licenses. Users can be assigned any number of permission set licenses.

Person Account

A person account is an individual consumer with whom you do business, such as a financial services client, an online shopper, or a vacation traveler. Person accounts are applicable to organizations that operate on a business-to-consumer model as opposed to a business-to-business model.

Personal Edition

Product designed for individual sales representatives and single users.

Personal Information

User information including personal contact information, quotas, personal group information, and default opportunity team.

Personal Settings

Settings and customization options to help users personalize their Salesforce experience. All Salesforce users can edit their own personal settings. Depending on an organization's user interface settings, users can access their personal settings from the Personal Setup area of the Setup menu, or from the menu under their avatar or name.

Phrase Search

A type of full-text search that matches only items that contain a specified phrase, such as "customer relationship management."

Picklist

Selection list of options available for specific fields in a Salesforce object, for example, the `Industry` field for accounts. Users can choose a single value from a list of options rather than make an entry directly in the field. See also Master Picklist.

Picklist (Multi-Select)

Selection list of options available for specific fields in a Salesforce object. Multi-select picklists allow users to choose one or more values. Users can choose a value by double clicking on it, or choose additional values from a scrolling list by holding down the CTRL key while clicking a value and using the arrow icon to move them to the selected box.

Picklist Values

Selections displayed in drop-down lists for particular fields. Some values come predefined, and other values can be changed or defined by an administrator.

Pinned Lists

Lists that display at the top or on the left side of a Service Cloud console; they're always visible and let you see the list you're working from and a record's details at the same time. Pinned lists must be turned on by an administrator.

Pipeline

Calculated amount of open opportunities that have a close date within the quarter. Displays on forecast detail and edit pages. For managers, this amount includes open opportunities for them and their entire team.

Platform as a Service (PaaS)

An environment where developers use programming tools offered by a service provider to create applications and deploy them in a cloud. The application is hosted as a service and provided to customers via the Internet. The PaaS vendor provides an API for creating and extending specialized applications. The PaaS vendor also takes responsibility for the daily maintenance, operation, and support of the deployed application and each customer's data. The service alleviates the need for programmers to install, configure, and maintain the applications on their own hardware, software, and related IT resources. Services can be delivered using the PaaS environment to any market segment.

Platform Edition

A Salesforce edition based on Enterprise, Unlimited, or Performance Edition that does not include any of the standard Salesforce apps, such as Sales or Service & Support.

Point

A point is a unit of measurement that represents the popularity of an idea. Each vote for an idea is worth ten points (promote adds 10 points and demote removes 10 points). An idea's total number of points displays to the left of the idea.

Popular Ideas

On the Popular Ideas subtab, ideas are sorted by an internal calculation that reflects the age of an idea's positive votes. Regardless of an idea's static total number of points, ideas with newer positive votes display higher on the page than ideas with older positive votes. This allows you to browse ideas that have most recently gained popularity, with less precedence given to long-established ideas that were positively voted on in the past.

Popular Questions

Each question's popularity is based on the number of users who **Like** it within a certain amount of time.

Post

A top-level comment in a Chatter feed.

Post Sharing

Lets you copy a public Chatter post and publish it to your profile or a group you're a member of. You can also share the post with other Chatter users by sending a link to the post in an email or instant message.

Postback Request

A *postback request* is made when user interaction requires a Visualforce page update, such as when a user clicks on a **Save** button and triggers a save action.

Price Book

A price book is a list of products that your organization sells. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions only.

Primary Contact

Field in company information that lists the primary contact for your organization.

Also indicates the primary contact associated with an account, contract, or opportunity. Specified as a checkbox in the Contact Roles related list of an account, contract, or opportunity.

Primary Key

A relational database concept. Each table in a relational database has a field in which the data value uniquely identifies the record. This field is called the primary key. The relationship is made between two tables by matching the values of the foreign key in one table with the values of the primary key in another.

Primary Partner

Partner account designated as playing a key role in closing an opportunity. Specified as a checkbox in the Partners related list of an opportunity.

Primary Tab

A tab in a Salesforce console that displays the main item to work on, such as an account.

Printable View

An option that displays a page in a print-ready format.

Private Branch Exchange (PBX)

A telephony switch that is used exclusively by a single call center to route calls in Salesforce CRM Call Center.

Private Sharing

Private sharing is the process of sharing an uploaded package by using the URL you receive from Salesforce. This URL is not listed in the AppExchange. Using the unlisted URL allows you to share a package without going through the listing process or making it public.

Probability

Percentage estimate of the confidence in closing a specific opportunity. Probability is linked to opportunity *Stage*.

Process Instance

A process instance represents one instance of an approval process. A new process instance is created each time a record is submitted for approval.

Process Instance Node

A process instance node represents an instance of an approval step. A new process instance node is created each time a record enters a step in an approval process. No process instance node is created when the record doesn't meet the step criteria or if the approval process instance is otherwise completed without entering the step.

Process Visualizer

A tool that displays a graphical version of an approval process. The view-only diagram is presented as a flowchart. The diagram and an informational sidebar panel can help you visualize and understand the defined steps, rule criteria, and actions that comprise your approval process.

Product

A product is any item or service your organization sells. Products are defined in a price book, and can be added to opportunities. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions only.

Product, Checkout

A product is any item or service you purchase from Checkout. For example, a product could be a Professional Edition license, a support package, or extra storage.

Product Family

A picklist field on products that you can customize to categorize types of products.

Production Organization

A Salesforce organization that has live users accessing data.

Professional Edition

A Salesforce edition designed for businesses who need full-featured CRM functionality.

Profile

Defines a user's permission to perform different functions within Salesforce. For example, the Solution Manager profile gives a user access to create, edit, and delete solutions.

Profile, Chatter

A personal page for each Salesforce user that includes contact information, following and followers lists, a Chatter feed, and a photo.

Project

See Local Project.

Project Manifest

A control file (`package.xml`) that determines which components are retrieved or deployed. See also Local Project.

Promote

If you agree with or like an idea, click **promote** to add 10 points to the idea. You cannot promote the same idea more than once and you cannot promote an idea that you have already demoted. Salesforce automatically adds your promote vote to any idea you post.

To migrate changes from one organization to another. See also Deploy and Migration.

Prototype

The classes, methods and variables that are available to other Apex code.

Prototype object

This is a single `sObject` contained within the Visualforce `StandardSetController` class. If the prototype object's fields are set, those values are used during the save action, meaning that the values are applied to every record in the set controller's collection.

Provider Organization

When using the cross-org adapter for Salesforce Connect, the provider org stores the data that's accessed by the subscriber org.

Public Calendar

A calendar in which a group of people can track events of interest to all of them (such as marketing events, product releases, or training classes) or schedule a common activity (such as a team vacation calendar). For example, your marketing team can set up an events calendar to show upcoming marketing events to the entire sales and marketing organization.

Public Group

A set of users defined for sharing purposes. Only administrators can create public groups.

Published Article

Published articles are available on the Articles tab in the internal app and, if applicable, in the Customer Portal, partner portal, and public knowledge base. To remove a published article, you can archive it or change its status to “draft” on the Article Management tab. To access published articles on the Articles Management tab, click the **Articles** tab in the View area and choose **Published Articles**.

Published Translation

Published translations are articles translated into multiple languages that are available on the Articles tab in the internal app and, if applicable, in the Customer Portal, partner portal, and public knowledge base. To remove a published translation, you can archive it or change its status to “draft” on the Article Management tab. To access published translations on the Articles Management tab, click the **Translations** tab in the View area and choose **Published Translations**.

Publisher

The publisher of an AppExchange listing is the Salesforce user or organization that published the listing.

Publishing Cycle

Salesforce Knowledge Articles move through a publishing cycle from their creation to their deletion. The publishing cycle includes three different statuses: **Draft** is the stage when a new article is being created or an existing one is being updated. Articles with the **Online** status are draft articles that have been published and are now available to their different channels. Eventually, when a published article is at the end of its life, it can be moved to the **Archived** status or sent back to **Draft** to be updated in a subsequent version.

Purchase Rules

Purchase rules are the criteria your organization must satisfy before a purchase is approved.

Push Notifications, Mobile

Push notifications are alerts that apps render on mobile device home screens when users aren’t using the app. These alerts can consist of text, icons, and sounds, depending on the device type.

Push Notifications, Salesforce Console

Visual indicators in a Salesforce Console that show when a record or field has changed during a user’s session.

Push Upgrade

A method of delivering updates that sends upgrades of an installed managed package to all organizations that have installed the package.

Q

Quantity Schedule

A quantity schedule outlines the dates, number of units (i.e., quantity), and number of installments for billing or shipping a product. Your organization can decide exactly how to use schedules. Available in Enterprise, Unlimited, Performance, and Developer Editions only.

Quantity Forecasting

Forecasting based on the projected number of units sold.

Quantity Without Adjustments

Applies to Collaborative Forecasts. 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 Adjustment

Applies to Collaborative Forecasts. 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.

Quantity Without Owner Adjustment

Applies to Collaborative Forecasts. The forecast quantity as seen by the forecast owner without the owner's adjustment. This is the sum of the subordinate's opportunities, including adjustments made by their manager or by the subordinate themselves, plus the rollup of the owner's own opportunities. *It doesn't include adjustments made by the forecast owner.*

Query Locator

A parameter returned from the `query()` or `queryMore()` API call that specifies the index of the last result record that was returned.

Query String Parameter

A name-value pair that's included in a URL, typically after a '?' character. For example:

```
https://yourInstance.salesforce.com/001/e?name=value
```

Question

An issue posted to an answers community. When a community member asks a question, other community members post replies to help resolve the question.

Question, Private

An issue posted to an answers community, but marked **Private** so that only support agents can view and respond to it.

Queue

A holding area for items before they are processed. Salesforce uses queues in a number of different features and technologies.

Queue, Salesforce CRM Call Center

A mechanism for storing one or more inbound calls that cannot be immediately answered by a Salesforce CRM Call Center user. Some CTI systems use multiple queues to differentiate between different types of calls.

Quick Text

Quick text lets users create messages, such as greetings, answers to common questions, and short notes, which users can easily insert into communications with customers to save time and increase standardization.

Quota

The sales goal assigned to a user on a monthly and quarterly basis. (If you use Collaborative Forecasts, it's the sales goal assigned to a user on a monthly basis.) A manager's quota should equal the amount she and her team are expected to generate together.

Quote

A record showing proposed prices for products and services. Quotes can be created from opportunities and emailed as PDFs to customers.

Quote, Checkout

A Checkout quote is a convenient, risk-free way to price products or services and terms before placing an order. Quotes can be for new business, add-ons, upgrades, or renewals.

Quote Line Item

Any product or service you offer to your customers in a quote. Quote line items represent products from the selected price book.

R

Read Only

One of the standard profiles to which a user can be assigned. Read Only users can view and report on information based on their role in the organization. (That is, if the Read Only user is the CEO, they can view all data in the system. If the Read Only user has the role of Western Rep, they can view all data for their role and any role below them in the hierarchy.)

Recall Actions

A recall action occurs when a submitted approval request is recalled. By default, the record is unlocked.

Recent Activity

Your Recent Activity page contains a summary of all the recent activity that relates to your participation within a zone. For example, this page lists all the ideas and comments you have posted to a zone as well as the ideas you have voted on. You can view your Recent Activity page by clicking your nickname located on the right side of the Ideas tab.

Recent Items

List of links in the sidebar for most recently accessed records. Note that not all types of records are listed in the recent items.

Record

A single instance of a Salesforce object. For example, "John Jones" might be the name of a contact record.

Record Detail Page

A record detail page, is a page that includes details about a Salesforce record such as an account or a contact. Examples of details include the record owner, contact information, and company information.

Record ID

The unique identifier for each record.

Record-Level Security

A method of controlling data in which you can allow a particular user to view and edit an object, but then restrict the records that the user is allowed to see.

Record Locking

Record locking prevents users from editing a record, regardless of field-level security or sharing settings. By default, Salesforce locks records that are pending approval. Only admins can edit locked records.

Record Name

A standard field on all Salesforce objects. Whenever a record name is displayed in a Lightning Platform application, the value is represented as a link to a detail view of the record. A record name can be either free-form text or an autonumber field. `Record Name` does not have to be a unique value.

Record Type

A record type is a field available for certain records that can include some or all of the standard and custom picklist values for that record. You can associate record types with profiles to make only the included picklist values available to users with that profile.

Record Update

A post in a Chatter feed that is the result of a field change on a record that is being followed.

Recurring Event

An event that has been created as part of an event series, such as a series of weekly meetings or monthly status reports. See [Even Series](#).

Recycle Bin

A page that lets you view and restore deleted information. Access the Recycle Bin by using the link in the sidebar.

Regression Testing

Testing that uncovers why functionality that was previously working stops working as intended. A stable set of data must be used for regression testing. For this reason, it is a good idea to use a configuration-only sandbox that pulls its data from an immutable source.

Related List

A section of a record or other detail page that lists items related to that record. For example, the Stage History related list of an opportunity or the Open Activities related list of a case.

Related List Hover Links

A type of link that allows you to quickly view information on a detail page about related lists, by hovering your mouse over the link. Your administrator must enable the display of hover links. The displayed text contains the corresponding related list and its number of records. You can also click this type of link to jump to the content of the related list without having to scroll down the page.

Related List Item

Any entry within a related list such as a note, contact, or activity.

Related Object

Objects chosen by an administrator to display in the Agent console's mini view when records of a particular type are shown in the console's detail view. For example, when a case is in the detail view, an administrator can choose to display an associated account, contact, or asset in the mini view.

Relationship

A connection between two objects, used to create related lists in page layouts and detail levels in reports. Matching values in a specified field in both objects are used to link related data; for example, if one object stores data about companies and another object stores data about people, a relationship allows you to find out which people work at the company.

Relationship Group

Custom object records used to store collections of accounts.

Relationship Group Member

The accounts that you add to relationship groups are called *relationship group members*.

Relationship Query

In a SOQL context, a query that traverses the relationships between objects to identify and return results. Parent-to-child and child-to-parent syntax differs in SOQL queries.

Release Management

See Application Lifecycle Management (ALM).

Release Train

A scheduling technique for delivering application upgrades on a regular cycle.

Remote Access Application

A *remote access application* is an application external to Salesforce that uses the OAuth protocol to verify both the Salesforce user and the external application. A remote access application is implemented as a [connected app](#) on page 54.

Renewal

A renewal is a type of quote for a Salesforce customer whose contract is expiring.

Reply

The response to a question in an answers community. When community members reply to a question, the person who asked the question can mark one of the replies as the best answer to resolve and close the question.

Report

A *report* returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access. See Tabular Report, Summary Report, and Matrix Report.

Report Builder

Report builder is a visual editor for reports.

Report Type

A *report type* defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type. Salesforce provides a set of pre-defined standard report types; administrators can create custom report types as well.

Requested Meeting

A meeting that a Salesforce user requests with a contact, lead or person account. When a meeting is requested, Salesforce creates a unique Web page for the meeting that displays the proposed meeting times. When invitees visit the page, they select the times they can meet and send a reply. Salesforce tracks all the responses so the organizer can confirm the best time to meet.

Once a requested meeting is confirmed, it becomes a *multi-person event*.

Resource Calendar

A calendar in which multiple people can coordinate their usage of a shared resource such as a conference room or printer.

REST (Representational State Transfer)

A software architecture that lets clients and servers communicate resources, usually via HTTP.

REST API

A Web services application programming interface that uses REST to provide access to your Salesforce organization's information.

Revenue Forecasting

Forecasting based on projected revenue amounts.

Revenue Schedule

A revenue schedule outlines the dates, revenue amounts, and number of installments for billing or recognizing revenue from a product. Your organization can decide exactly how to use schedules. Available in Enterprise, Unlimited, Performance, and Developer Editions only.

Role

Assigned responsibility of a user, partner account, or contact for specific accounts and opportunities. Administrators can define user roles in Setup. Individual users can assign specific partner and contact roles for accounts and contacts.

Role Hierarchy

A record-level security setting that defines different levels of users such that users at higher levels can view and edit information owned by or shared with users beneath them in the role hierarchy, regardless of the organization-wide sharing model settings.

Roll-Up Summary Field

A field type that automatically provides aggregate values from child records in a master-detail relationship.

Routing Point

A mechanism that determines the Salesforce CRM Call Center queue that should control an incoming call.

Running User

Each dashboard has a *running user*, whose security settings determine which data to display in a dashboard. If the running user is a specific user, all dashboard viewers see data based on the security settings of that user—regardless of their own personal security settings. For dynamic dashboards, you can set the running user to be the logged-in user, so that each user sees the dashboard according to his or her own access level.

S

S-Control

Note: S-controls have been superseded by Visualforce pages. After March 2010 organizations that have never created s-controls, as well as new organizations, won't be allowed to create them. Existing s-controls will remain unaffected, and can still be edited.

Custom Web content for use in custom links. Custom s-controls can contain any type of content that you can display in a browser, for example a Java applet, an Active-X control, an Excel file, or a custom HTML Web form.

SaaS

See Software as a Service (SaaS).

Salesforce

"Salesforce" is the legal name of the company.

Salesforce

Salesforce is the name of the Salesforce application.

Salesforce API Version

See Version.

Salesforce Certificate and Key Pair

Salesforce certificates and key pairs are used for signatures that verify a request is coming from your organization. They are used for authenticated SSL communications with an external web site, or when using your organization as an Identity Provider. You only need to generate a Salesforce certificate and key pair if you're working with an external website that wants verification that a request is coming from a Salesforce organization.

Salesforce CRM Call Center

A Salesforce feature that seamlessly integrates Salesforce with third-party computer-telephony integration (CTI) systems.

Salesforce CRM Content

An on-demand, content-management system that allows you to organize, share, search, and manage content within your organization and across key areas of the Salesforce application. Content can include all file types, from traditional business documents such as Microsoft PowerPoint presentations to audio files, video files, and Web pages.

Salesforce for Outlook

Salesforce for Outlook, a Microsoft® Outlook® integration application that you install, syncs contacts, events, and tasks between Outlook and Salesforce. In addition to syncing these items, you can add Outlook emails, attachments, events, and tasks to multiple Salesforce contacts, and view Salesforce records related to the contacts and leads in your emails and events—all directly in Outlook.

You may be able to customize what you sync and the sync directions between Outlook and Salesforce. Your administrator determines the level at which you can customize these settings in Salesforce.

Salesforce for Outlook Configuration

Salesforce for Outlook configurations include settings for the data that Salesforce for Outlook users can sync between Microsoft® Outlook® and Salesforce. Administrators can create separate configurations for different types of users, and give users permission to edit some of their own settings. For example, an opportunity team might want to sync everything, while a manager might want to sync only events.

Salesforce Connect

Salesforce Connect provides access to data that's stored outside the Salesforce org, such as data in an enterprise resource planning (ERP) system and records in another org. Salesforce Connect represents the data in external objects and accesses the external data in real time via Web service callouts to external data sources.

Salesforce Console

The Salesforce console is designed for users in fast-paced environments who need to find, update, and create records quickly. It improves upon the Agent Console in the Console tab by displaying records and related items as tabs on one screen.

Salesforce Console Integration Toolkit

An API that uses browsers as clients to display pages as tabs in a Salesforce console; it provides developers with programmatic access to the console so that administrators can extend it to meet your business needs.

Salesforce Office Toolkit

A plug-in makes it easy for developers to access the SOAP API directly from within Microsoft Office products, simplifying the creation of new integrations and Office-based solutions.

Salesforce Record ID

A unique 15- or 18-character alphanumeric string that identifies a single record in Salesforce.

Salesforce SOA (Service-Oriented Architecture)

A powerful capability of Lightning Platform that allows you to make calls to external Web services from within Apex.

Sales Price

The price of a product on an opportunity. This can be different than the product's standard or list price.

Sandbox

A nearly identical copy of a Salesforce production organization for development, testing, and training. The content and size of a sandbox varies depending on the type of sandbox and the edition of the production organization associated with the sandbox.

Sandbox Templates

Sandbox templates give you control over which objects are copied to your sandbox.

Save As

Option on any standard, public, or custom report to save the parameters of the report without altering the original report. It creates a new custom report with your saved changes.

Save & New

Alternative “save” on most pages with which you can save your current changes and create a new entry.

Schedule

See Quantity Schedule and Revenue Schedule.

Screen Pop

Page that displays for an inbound call to a Salesforce CRM Call Center.

Search

Feature that lets you search for information that matches specified keywords. If you have sidebar search, enter search terms in the Search section of the sidebar or click **Advanced Search...** for more search options. If you have global search, enter search terms in the search box in the header.

Search Layout

The organization of fields included in search results, in lookup dialogs, and in the key lists on tab home pages.

Search Phrase

Search phrases are queries that users enter when searching on www.google.com.

Self-Service

A web portal feature that allows your customers to search your organization’s public solutions to find answers to their questions and to submit new cases to your customer support team.

Semi-Join

A semi-join is a subquery on another object in an `IN` clause in a SOQL query. You can use semi-joins to create advanced queries, such as getting all contacts for accounts that have an opportunity with a particular record type. See also Anti-Join.

Service

A service is an offering of professional assistance. Services related to Salesforce and the Lightning Platform, such as enhanced customer support or assistance with configuration can be listed on the AppExchange.

Service Cloud Portal

The Service Cloud portal is the Customer Portal intended for many thousands to millions of users. After you purchase Service Cloud portal licenses, you can assign them to Customer Portal-enabled contacts so that large numbers of users can log in to a Customer Portal without affecting its performance.

Service Contract

Service contracts are agreements between you and your customers for a type of customer support. Service contracts can represent different kinds of customer support, such as warranties, subscriptions, or service level agreements (SLAs).

Session ID

An authentication token that is returned when a user successfully logs in to Salesforce. The Session ID prevents a user from having to log in again every time they want to perform another action in Salesforce. Different from a record ID or Salesforce ID, which are terms for the unique ID of a Salesforce record.

Session Timeout

The time after login before a user is automatically logged out. Sessions expire automatically after a predetermined length of inactivity, which can be configured in Salesforce from Setup by clicking **Security Controls**. The default is 120 minutes (two hours). The inactivity timer is reset to zero if a user takes an action in the web interface or makes an API call.

Setter Methods

Methods that assign values. See also Getter Methods.

Settings

When the user has Lightning Experience, personal settings are available from the Settings menu under the user's avatar.

Setup

A menu where administrators can customize and define organization settings and Lightning Platform apps. Depending on your organization's user interface settings, Setup may be a link in the user interface header or in the dropdown list under your name.

Share Group

A set of Salesforce users who can access records owned by high volume portal users. Each Customer Portal has its own share group.

Shared Activities

A feature that allows users to relate as many as 10 contacts to a single non-recurring and non-group task, or to a single non-recurring event. One contact is the primary contact; all others are secondary contacts.

Sharing

Allowing other users to view or edit information you own. There are different ways to share data:

- **Sharing Model**—defines the default organization-wide access levels that users have to each other's information and whether to use the hierarchies when determining access to data.
- **Role Hierarchy**—defines different levels of users such that users at higher levels can view and edit information owned by or shared with users beneath them in the role hierarchy, regardless of the organization-wide sharing model settings.
- **Sharing Rules**—allow an administrator to specify that all information created by users within a given group or role is automatically shared to the members of another group or role.
- **Manual Sharing**—allows individual users to share records with other users or groups.
- **Apex-Managed Sharing**—enables developers to programmatically manipulate sharing to support their application's behavior. See Apex-Managed Sharing.

Sharing, Chatter

See Post Sharing.

Sharing Group

See Public Group.

Sharing Model

Behavior defined by your administrator that determines default access by users to different types of records.

Sharing Rule

Type of default sharing created by administrators. Allows users in a specified group or role to have access to all information created by users within a given group or role.

Show/Hide Details

Option available for reports that lets you show/hide the details of individual column values in report results.

Sidebar

Column appearing on the left side of each page that provides links to recent items and other resources.

Sites

Salesforce Sites enables you to create public websites and applications that are directly integrated with your Salesforce organization—without requiring users to log in with a username and password.

Skeleton Template

A type of Visualforce template that uses the `<apex:composition>` tag. Skeleton templates define a standard structure that requires implementation from subsequent pages.

Snippet

Note: S-controls have been superseded by Visualforce pages. After March 2010 organizations that have never created s-controls, as well as new organizations, won't be allowed to create them. Existing s-controls will remain unaffected, and can still be edited.

A type of s-control that is designed to be included in other s-controls. Similar to a helper method that is used by other methods in a piece of code, a snippet allows you to maintain a single copy of HTML or JavaScript that you can reuse in multiple s-controls.

SOAP (Simple Object Access Protocol)

A protocol that defines a uniform way of passing XML-encoded data.

SOAP API

A SOAP-based Web services application programming interface that provides access to your Salesforce organization's information.

sObject

The abstract or parent object for all objects that can be stored in the Lightning Platform.

Social Accounts and Contacts

A feature that allows you to view your accounts', contacts', and leads' social network profiles and other social information directly in Salesforce, so you can get deeper insights into your existing and potential customers' needs and issues.

Social Handle

The unique identifier for a person or company on a social network. Social handle is a complete URL including the social network domain and the person's user name. For example, LinkedIn: `http://www.linkedin.com/in/marcbenioff`, `http://www.linkedin.com/company/salesforce`; Twitter: `https://twitter.com/marc.benioff`, `https://twitter.com/salesforce`; Facebook: `http://www.facebook.com/marc.benioff`, `www.facebook.com/salesforce`.

Social Key

Social Key works with Social Accounts and Contacts and Data.com Clean to make it easier to follow your contacts and leads on social networks. From Social Accounts and Contacts, select the social networks you want. Automated Clean jobs provide the links. From a contact or lead's detail page, you can quickly view their profile on a social network site.

Social Profile or Social Network Profile

On social network sites, the content that appears when someone connects to a person or company via their social handle (for example, a person's timeline on Facebook). A social profile generally includes identifying information and a feed.

Softphone

The telephone interface that a Salesforce CRM Call Center user sees in either the sidebar of pages in Salesforce Classic or the footer of pages in Lightning Experience and the Salesforce console.

Softphone Connector

A component of a Computer Telephony Integration (CTI) adapter that converts Softphone XML into HTML and distributes it to a Salesforce CRM Call Center user's browser.

Softphone CTI Adapter

A computer-telephony integration (CTI) adapter is a light-weight software program that controls the appearance and behavior of a Salesforce softphone. The adapter acts as an intermediary between a third-party CTI system, Salesforce, and a Salesforce CRM Call Center user. It must be installed on any machine that needs access to Salesforce CRM Call Center functionality.

Software as a Service (SaaS)

A delivery model where a software application is hosted as a service and provided to customers via the Internet. The SaaS vendor takes responsibility for the daily maintenance, operation, and support of the application and each customer's data. The service

alleviates the need for customers to install, configure, and maintain applications with their own hardware, software, and related IT resources. Services can be delivered using the SaaS model to any market segment.

Solution

A *solution* is a detailed description of the resolution to a customer issue.

Solution Manager

One or more individuals in your organization who can review, edit, publish, and delete solutions. Typically, these individuals are product experts with excellent written communication skills and advanced knowledge in a particular area of your product. When creating or editing users, assign the Solution Manager profile to give users this privilege.

SOQL (Salesforce Object Query Language)

A query language that allows you to construct simple but powerful query strings and to specify the criteria that selects data from the Lightning Platform database.

SOSL (Salesforce Object Search Language)

A query language that allows you to perform text-based searches using the Lightning Platform API.

Source Report

A custom report scheduled to run and load data as records into a target object for a reporting snapshot.

Special Terms

Any terms that you have agreed to and want to track in your contract.

Stage Duration

In opportunity reports, the number of days the opportunity was in the stage listed in the `Stage` column.

Stage History

Related list on an opportunity detail page that lists changes in status and stage for the opportunity.

Standard Object

A built-in object included with the Lightning Platform. You can also build custom objects to store information that is unique to your app.

Standard Price

Price for a product that is included in the Standard Price Book.

Standard Price Book

Automatically generated price book containing all your products and their standard prices.

Statement

A statement that you can generate. A statement summarizes payments, invoices, and credit memos.

Status

An idea's status helps zone members track the progress of the idea. For example, "Under Review", "Reviewed", "Coming Soon", and "Now Available" are common status values an administrator can define and assign to ideas. An idea's status appears next to the idea's title for all zone members to see.

Stemming

The process of reducing a word to its root form. In searches, stemming matches expanded forms of a search term. For example, when a search uses stemming, a search for *run* matches items that contain *run*, *running*, and *ran*.

Subflow

A subflow element references another flow, which it calls at run time. The flow that contains the subflow element is referred to as the master flow.

Subscriber

The subscriber of a package is a Salesforce user with an installed package in their Salesforce organization.

Subscriber Organization

The subscriber org uses the cross-org adapter for Salesforce Connect to access data that's stored in another (provider) org. The subscriber org contains the external data source definition and the external objects that map to the provider org's objects.

Summary Field

A summary field is a numerical report column with one of the following summaries applied: sum, average, largest value, smallest value. Users can define custom summary formulas to extend these options. In addition to showing summarized information, summary fields can be used to define charts and reporting snapshots.

Summary Report

Summary reports are similar to tabular reports, but also allow users to group rows of data, view subtotals, and create charts. They can be used as the source report for dashboard components. Use this type for a report to show subtotals based on the value of a particular field or when you want to create a hierarchical list, such as all opportunities for your team, subtotaled by `Stage` and `Owner`.

Sync

Sync refers to transferring and merging your data within Salesforce or between Salesforce and a desktop or mobile application. For example, you can sync data between Salesforce objects, like quotes and opportunities, or with external applications, like Microsoft Outlook, Connect Offline, or Salesforce Mobile.

Syndication Feeds

Give users the ability to subscribe to changes within Salesforce Sites and receive updates in external news readers.

System Administrator

See Administrator (System Administrator).

System Log

Part of the Developer Console, a separate window console that can be used for debugging code snippets. Enter the code you want to test at the bottom of the window and click Execute. The body of the System Log displays system resource information, such as how long a line took to execute or how many database calls were made. If the code did not run to completion, the console also displays debugging information.

System Testing

The phase of testing that detects problems caused by multiple integrations or within the system as a whole. System testing should require no knowledge of the inner design of the code or logic.

T

Tab

A tab is an interface component that allows you to navigate around an app. A tab serves as the starting point for viewing, editing, and entering information for a particular object. When you click a tab at the top of the page, the corresponding tab home page for that object appears. A tab can be associated with an object, a web page, or a Visualforce page.

Tabular Report

Tabular reports are the simplest and fastest way to look at data. Similar to a spreadsheet, they consist simply of an ordered set of fields in columns, with each matching record listed in a row. Tabular reports are best for creating lists of records or a list with a single grand total. They can't be used to create groups of data or charts, and can't be used in dashboards unless rows are limited. Examples include contact mailing lists and activity reports.

Tag

In Salesforce, a word or short phrases that users can associate with most records to describe and organize their data in a personalized way. Administrators can enable tags for accounts, activities, assets, campaigns, cases, contacts, contracts, dashboards, documents, events, leads, notes, opportunities, reports, solutions, tasks, and any custom objects (except relationship group members) Tags can also be accessed through the SOAP API.

Tag Cloud

In Salesforce CRM Content, a way of showing you how the content in your libraries has been tagged. Tag names increase in size within the tag cloud according to popularity, meaning that the largest tags have been assigned to the most files or web links. You can choose to sort the tags alphabetically or by popularity. The tag cloud contains the 30 most popular tags.

Task Bar Links

Links on tabbed pages that provide quick access to the most common operations available for a particular page, for example, creating an account.

Tenant Secret

An organization-specific secret used with the master secret and key derivation function to generate a derived data encryption key. When an organization administrator rotates a key, a new tenant secret is generated. To access the tenant secret via the API, refer to the `TenantSecret` object. *No Salesforce employees have access to these keys in cleartext.*

Territory

For forecasting versions where territories are used, a territory is a collection of accounts and users that generates a forecast.

Test Case Coverage

Test cases are the expected real-world scenarios in which your code will be used. Test cases are not actual unit tests, but are documents that specify what your unit tests should do. High test case coverage means that most or all the real-world scenarios you have identified are implemented as unit tests. See also Code Coverage and Unit Test.

Test Drive

A test drive is a fully functional Salesforce organization that contains an app and any sample records added by the publisher for a particular package. It allows users on AppExchange to experience an app as a read-only user using a familiar Salesforce interface.

Test Method

An Apex class method that verifies whether a particular piece of code is working properly. Test methods take no arguments, commit no data to the database, and can be executed by the `runTests()` system method either through the command line or in an Apex IDE, such as the Force.com IDE.

Test Organization

See Sandbox.

Text

Data type of a custom field that allows entry of any combination of letters, numbers, or symbols, up to a maximum length of 255 characters.

Text Area

A custom field data type that allows entry of up to 255 characters on separate lines.

Text Area (Long)

See Long Text Area.

Time-Dependent Workflow Action

A workflow action that executes when the conditions of a workflow rule and an associated time trigger are met.

Timeout

See Session Timeout.

Time Trigger

An event that starts according to a specified time threshold, such as seven days before an opportunity close date. For example, you might define a time-based workflow action that sends email to the account manager seven days before a scheduled milestone.

Top All Time Ideas

On the Top All-Time subtab, ideas are sorted from most number of points to fewest. This subtab allows you to see the most popular ideas in the history of your Ideas zone.

Topics

When you post or comment in Chatter, you can associate your post or comment with all other posts and comments on the same subject by adding a topic. A topic is a way to categorize your post or comment so other people can find it more easily. Topics also help you discover people and groups that are knowledgeable and interested in the same topics.

Topics, Chatter Answers

The sidebar that lists data categories from which your customers can browse questions and replies. For example, if you have a zone for hardware products, your topics may include laptops, desktops, and printers.

Transaction, Apex

An *Apex transaction* represents a set of operations that are executed as a single unit. All DML operations in a transaction either complete successfully, or if an error occurs in one operation, the entire transaction is rolled back and no data is committed to the database. The boundary of a transaction can be a trigger, a class method, an anonymous block of code, a Visualforce page, or a custom Web service method.

Transaction, Checkout

A transaction is a financial adjustment to your account. Transactions are reflected in invoices or credit memos.

Translation Workbench

The Translation Workbench lets you specify languages you want to translate, assign translators to languages, create translations for customizations you've made to your Salesforce organization, and override labels and translations from managed packages. Everything from custom picklist values to custom fields can be translated so your global users can use Salesforce in their language.

Trending Topics

The Trending Topics area on the Chatter tab shows the topics being discussed right now in Chatter. The more frequently people add a specific topic to their posts and comments and comment on or like posts with the same topic over a short period, the more likely it is to become a trending topic. For example, if your coworkers are attending the upcoming Dreamforce conference and have started discussing it in Chatter, you may see a trending topic for Dreamforce. A trending topic is not solely based on popularity and usually relates to a one-time or infrequent event that has a spike in activity, such as a conference or a project deadline. For privacy reasons, Trending Topics don't include topics used solely in private groups or record feeds.

Trigger

A piece of Apex that executes before or after records of a particular type are inserted, updated, or deleted from the database. Every trigger runs with a set of context variables that provide access to the records that caused the trigger to fire, and all triggers run in bulk mode—that is, they process several records at once, rather than just one record at a time.

Trigger Context Variable

Default variables that provide access to information about the trigger and the records that caused it to fire.

Truncate

Truncating a custom object lets you remove all the object's records, while keeping the object and its metadata.

U

Unfollow

To stop following a user or record and stop seeing related posts in your Chatter feed.

Unique Name Used by API

The unique name used by the API and managed packages.

Unit Test

A unit is the smallest testable part of an application, usually a method. A unit test operates on that piece of code to make sure it works correctly. See also Test Method.

Unlimited Edition

Unlimited Edition is Salesforce's solution for maximizing your success and extending that success across the entire enterprise through the Lightning Platform.

Unmanaged Package

A package that cannot be upgraded or controlled by its developer.

Update

A single activity that displays in a Chatter feed, such as a post, or field change.

Upgrade, Checkout

An upgrade is a type of quote for a Salesforce customer who wants to upgrade their Salesforce Edition.

Upgrading

Upgrading a package is the process of installing a newer version. Salesforce supports upgrades for managed packages that are not beta.

Uploading

Uploading a package in Salesforce provides an installation URL so other users can install it. Uploading also makes your packaged available to be published on AppExchange.

URL (Uniform Resource Locator)

The global address of a website, document, or other resource on the Internet. For example, <http://www.salesforce.com>.

URL S-Control

Note: S-controls have been superseded by Visualforce pages. After March 2010 organizations that have never created s-controls, as well as new organizations, won't be allowed to create them. Existing s-controls will remain unaffected, and can still be edited.

An s-control that contains an external URL that hosts the HTML that should be rendered on a page. When saved this way, the HTML is hosted and run by an external website. URL s-controls are also called web controls.

Usage-based Entitlement

A usage-based entitlement is a limited resource that your organization can use on a periodic basis—such as the allowed number of monthly logins to a Partner Community or the record limit for Data.com list users.

User Acceptance Testing (UAT)

A process used to confirm that the functionality meets the planned requirements. UAT is one of the final stages before deployment to production.

User Interface

The layouts that specify how a data model should be displayed.

User License

A user license determines the baseline of features that the user can access. Every user must have exactly one user license.

User Permission

See Permission.

User Provisioning for Connected Apps

User provisioning for connected apps lets administrators create, update, and manage user accounts for the service associated with a connected app, such as Google Apps. This creates third-party accounts and links your Salesforce users' accounts to the third-party service for account updates or deletion. After these accounts are linked, administrators can configure the App Launcher, so their users click the connected app in the App Launcher and get instant access to the target service..

V

Validation Rule

A rule that prevents a record from being saved if it does not meet the standards that are specified.

Version

A number value that indicates the release of an item. Items that can have a version include API objects, fields, and calls; Apex classes and triggers; and Visualforce pages and components.

View

The user interface in the Model-View-Controller model, defined by Visualforce.

View State

Where the information necessary to maintain the state of the database between requests is saved.

Visualforce

A simple, tag-based markup language that allows developers to easily define custom pages and components for apps built on the platform. Each tag corresponds to a coarse or fine-grained component, such as a section of a page, a related list, or a field. The components can either be controlled by the same logic that is used in standard Salesforce pages, or developers can associate their own logic with a controller written in Apex.

Visualforce Controller

See Controller, Visualforce.

Visualforce Lifecycle

The stages of execution of a Visualforce page, including how the page is created and destroyed during a user session.

Visualforce Page

A web page created using Visualforce. Typically, Visualforce pages present information relevant to your organization, but they can also modify or capture data. They can be rendered in several ways, such as a PDF document or an email attachment, and can be associated with a CSS style.

Voice Response Unit (VRU)

See Interactive Voice Response (IVR).

Vote, Idea

In an ideas community, a vote means that you have either promoted or demoted an idea. After you vote on an idea, your nickname displays at the bottom of the idea's detail page to track that your vote was made. You can use your Recent Activity page to see a list of all the ideas you have voted on.

Vote, Reply

In an answers community, a vote means that you either like or dislike a reply to a question.

W

Web Direct Leads

Web direct leads is a specific lead source indicating that the lead was generated when a user, who has bookmarked your website or directly typed the URL of your website into a browser, filled out the Web-to-Lead form containing the Salesforce tracking code.

Web Control

See URL S-Control.

Web Links

See Custom Links.

Web Referral Leads

Web referral lead is a specific lead source indicating that the lead was generated when a user navigated to your website using a referring link on another site and filled out the Web-to-Lead form containing the Salesforce tracking code. For example, if a user is browsing your partner's website and clicks a link to your website, then fills out your Web-to-Lead form, a web referral lead is generated. The lead source details include the referring URL for each web referral lead.

Web Service

A mechanism by which two applications can easily exchange data over the Internet, even if they run on different platforms, are written in different languages, or are geographically remote from each other.

WebService Method

An Apex class method or variable that external systems can use, like a mash-up with a third-party application. Web service methods must be defined in a global class.

Web Services API

A Web services application programming interface that provides access to your Salesforce organization's information. See also SOAP PI and Bulk API.

Web Tab

A custom tab that allows your users to use external websites from within the application.

Web-to-Case

Functionality that lets you gather customer support issues and feedback on your company's website and then generate cases using that data.

Web-to-Lead

Functionality that lets you gather registration or profile information on your company's website and then generate leads using that data.

Wildcard

A character that is used in a search term to represent one or more other characters. In most Salesforce searches, the asterisk (*) and question mark (?) can be used as wildcards.

Wizard

A user interface that leads a user through a complex task in multiple steps.

Automated Actions

Automated actions, such as email alerts, tasks, field updates, and outbound messages, can be triggered by a process, workflow rule, approval process, or milestone.

Workflow Action

A workflow action, such as an email alert, field update, outbound message, or task, fires when the conditions of a workflow rule are met.

Workflow Email Alert

A workflow action that sends an email when a workflow rule is triggered. Unlike workflow tasks, which can only be assigned to application users, workflow alerts can be sent to any user or contact, as long as they have a valid email address.

Workflow Field Update

A workflow action that changes the value of a particular field on a record when a workflow rule is triggered.

Workflow Outbound Message

A workflow action that sends data to an external Web service, such as another cloud computing application. Outbound messages are used primarily with composite apps.

Workflow Queue

A list of workflow actions that are scheduled to fire based on workflow rules that have one or more time-dependent workflow actions.

Workflow Rule

A workflow rule sets workflow actions into motion when its designated conditions are met. You can configure workflow actions to execute immediately when a record meets the conditions in your workflow rule, or set time triggers that execute the workflow actions on a specific day.

Workflow Task

A workflow action that assigns a task to an application user when a workflow rule is triggered.

Wrapper Class

A class that abstracts common functions such as logging in, managing sessions, and querying and batching records. A wrapper class makes an integration more straightforward to develop and maintain, keeps program logic in one place, and affords easy reuse across components. Examples of wrapper classes in Salesforce include the AJAX Toolkit, which is a JavaScript wrapper around the Salesforce SOAP API, wrapper classes such as `CCriticalSection` in the CTI Adapter for Salesforce CRM Call Center, or wrapper classes created as part of a client integration application that accesses Salesforce using the SOAP API.

WSC (Web Service Connector)

An XML-based Web service framework that consists of a Java implementation of a SOAP server. With WSC, developers can develop client applications in Java by using Java classes generated from Salesforce Enterprise WSDL or Partner WSDL.

WSDL (Web Services Description Language) File

An XML file that describes the format of messages you send and receive from a Web service. Your development environment's SOAP client uses the Salesforce Enterprise WSDL or Partner WSDL to communicate with Salesforce using the SOAP API.

X

XML (Extensible Markup Language)

A markup language that enables the sharing and transportation of structured data. All Lightning Platform components that are retrieved or deployed through the Metadata API are represented by XML definitions.

Y

No Glossary items for this entry.

Z

Zip File

A data compression and archive format.

A collection of files retrieved or deployed by the Metadata API. See also Local Project.

Zone

Zones organize ideas and questions into logical groups, with each zone having its own focus and unique ideas and questions.