



# Salesforce Foundations

## Help Guide

Salesforce

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# CONTENTS

<b>DISCOVER SALESFORCE FOUNDATIONS</b> .....	5
Elevating Your CRM with Foundational Features.....	5
What Makes Salesforce Foundations Special.....	5
360-Degree View of Your Customers.....	6
Centralized Data.....	6
New Home Experience with the Home App.....	7
Simplified Navigation and Easy Access to Important Tasks.....	7
Vertical Navigation Bar.....	7
Quick Settings.....	8
Full Control over Enablement and Honoring Your Customizations.....	10
Supported Editions for Salesforce Foundations.....	10
Included Features in Salesforce Foundations.....	11
Marketing.....	11
Commerce.....	12
Data Cloud.....	12
Service.....	13
Sales.....	14
User Interface Improvements.....	14
Knowing Which Salesforce Foundations Features You Can Turn On.....	15
Considerations for Salesforce Foundations.....	16
Setup Considerations.....	16
User Interface Settings Considerations.....	17
Service Console Considerations.....	17
Supported Service Console Versions for Salesforce Foundations.....	17
Marketing Considerations.....	18
Data Cloud Considerations.....	18
Allocations for Salesforce Foundations.....	19
<b>SET UP SALESFORCE FOUNDATIONS</b> .....	20
User Interface and Navigation Enhancements.....	20
Turn On Quick Settings.....	20
Turn On the Vertical Navigation Bar.....	21
Give Users Access to the Home, Accounts, and Contacts Apps.....	21
Permission Set Groups for Salesforce Foundations.....	22
Salesforce Foundations Standard Permission Set Groups.....	22
Salesforce Foundations Standard Permission Sets.....	23
Assign Permission Set Groups from Quick Settings.....	23
Sales for Salesforce Foundations.....	24
Set Up Service for Salesforce Foundations.....	25
Set Up Data Cloud Tools for Salesforce Foundations.....	26
Set Up Marketing for Salesforce Foundations.....	27

Set Up Commerce for Salesforce Foundations..... 27

# DISCOVER SALESFORCE FOUNDATIONS

Get more out of your Salesforce experience with Salesforce Foundations.



**Note:** Salesforce Foundations is available on a limited basis in Summer '24. Contact your Salesforce account executive for more information.

## Elevating Your CRM with Foundational Features

Salesforce Foundations equips you with essential sales, service, marketing, and commerce capabilities, over a CRM foundation that's powered by Data Cloud. This suite is seamlessly built into your preexisting CRM, providing you with new capabilities and a 360-degree view of your customers—all at no extra cost.

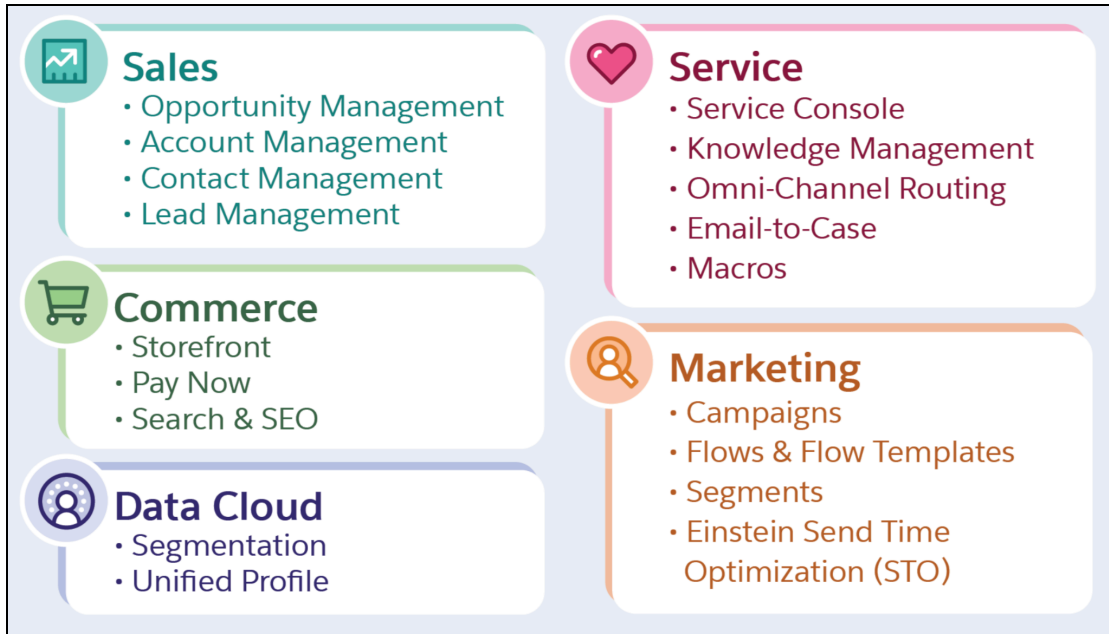
Imagine you have a subscription to a streaming service that allows you to watch movies. It's a fantastic feature for movie nights, but it specializes only in movies. Now imagine the same service announces you can also watch TV shows, live sports, and documentaries. Plus, you get a full view of your engagement and access an improved user experience—all included in your existing subscription. That's the benefit of using Salesforce Foundations.

## What Makes Salesforce Foundations Special

Salesforce Foundations provides a 360-degree view of your customer relationships across sales, service, marketing, and commerce through integrated applications and unified data. It also boosts productivity with streamlined, visually friendly user interface improvements, that you can turn on or off per your requirements. See [User Interface and Navigation Enhancements](#).

## 360-Degree View of Your Customers

Salesforce Foundations comes with integrated applications, the ability to unify your customer data, and dashboards that provide a comprehensive view of customer interactions. So every employee gets a full picture of the customer.



Already a Sales Cloud customer? Drive more revenue with sales, service, and marketing teams working in one place. Use foundational service functionality to keep opportunities on track with insights into service cases. Add relevant customers to marketing-created nurture campaigns.

Already a Service Cloud customer? Use foundational sales, marketing, and commerce functionality to strengthen your relationship with customers. Add customers to marketing onboarding journeys to create higher-touch onboarding experiences.

With a single view of your customer, your teams can create connected, personalized customer experiences that build stronger relationships. See [Included Features in Salesforce Foundations](#) and [Supported Editions for Salesforce Foundations](#).

## Centralized Data

Salesforce Foundations comes with Data Cloud running behind the scenes to unify your data and get it AI-ready. Get the real-time insights you need to personalize every customer experience, at every touchpoint.

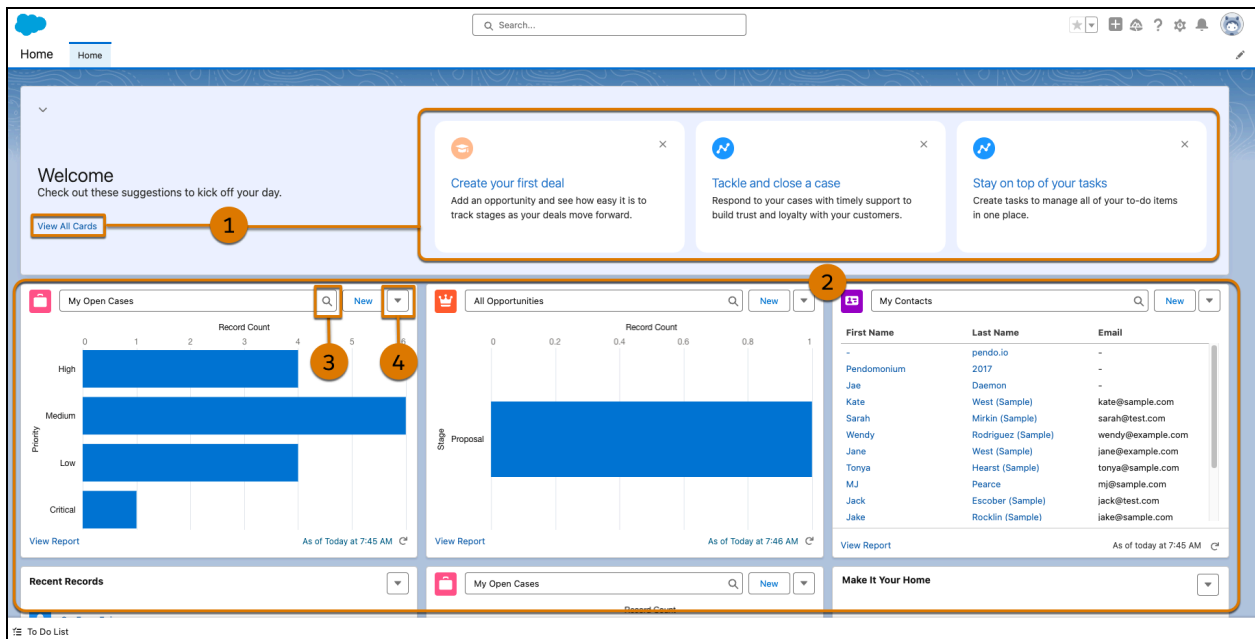
See Also

- [About Salesforce Data Cloud](#)
- [Salesforce Data Cloud: Quick Look](#)

# New Home Experience with the Home App

The Home app provides a visually friendly, uncluttered experience that helps you focus on the tasks that are most important to you.

Suggestions are provided to you based on your business needs and processes. These recommendations make it easy to accomplish tasks such as importing contacts and automating tasks. Click **View All Cards** to explore more suggestions (1). Get a panoramic view of your data and keep up with what's most important to you (2). To review other filter options, click 🔍 (3). To change what appears on the Home app, click ▼ in the top-right corner of a card and select **Change Home Card** (4).



## Simplified Navigation and Easy Access to Important Tasks

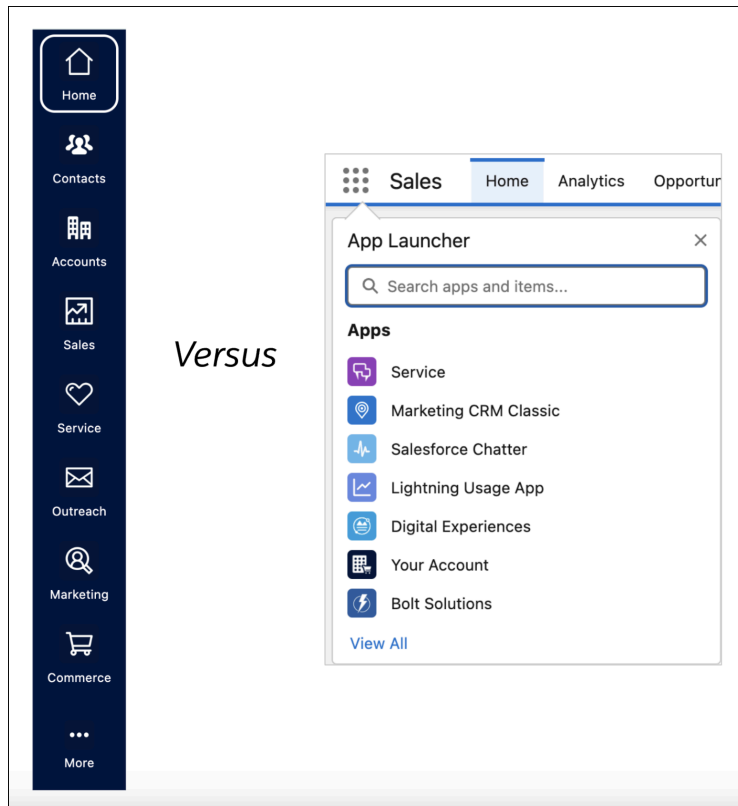
Salesforce Foundations navigation makes it simpler and faster to find the information and tasks you need. It's important that you understand some key differences between standard Salesforce navigation and Salesforce Foundations navigation.

### Vertical Navigation Bar

Salesforce Foundations provides a vertical navigation bar along the left side of the user interface. Now there's a central location to access your Marketing, Sales, Service, and Commerce solutions. With our vertical navigation bar, the apps you need are in plain view, so you see everything at a glance.

Use the App Launcher to personalize what apps appear. To open the App Launcher, click **More**. Favorite the apps that you want to include in your vertical navigation bar using the star icon. You can

order them the way you want directly in the navigation bar or in the App Launcher by dragging the app to the location you want.

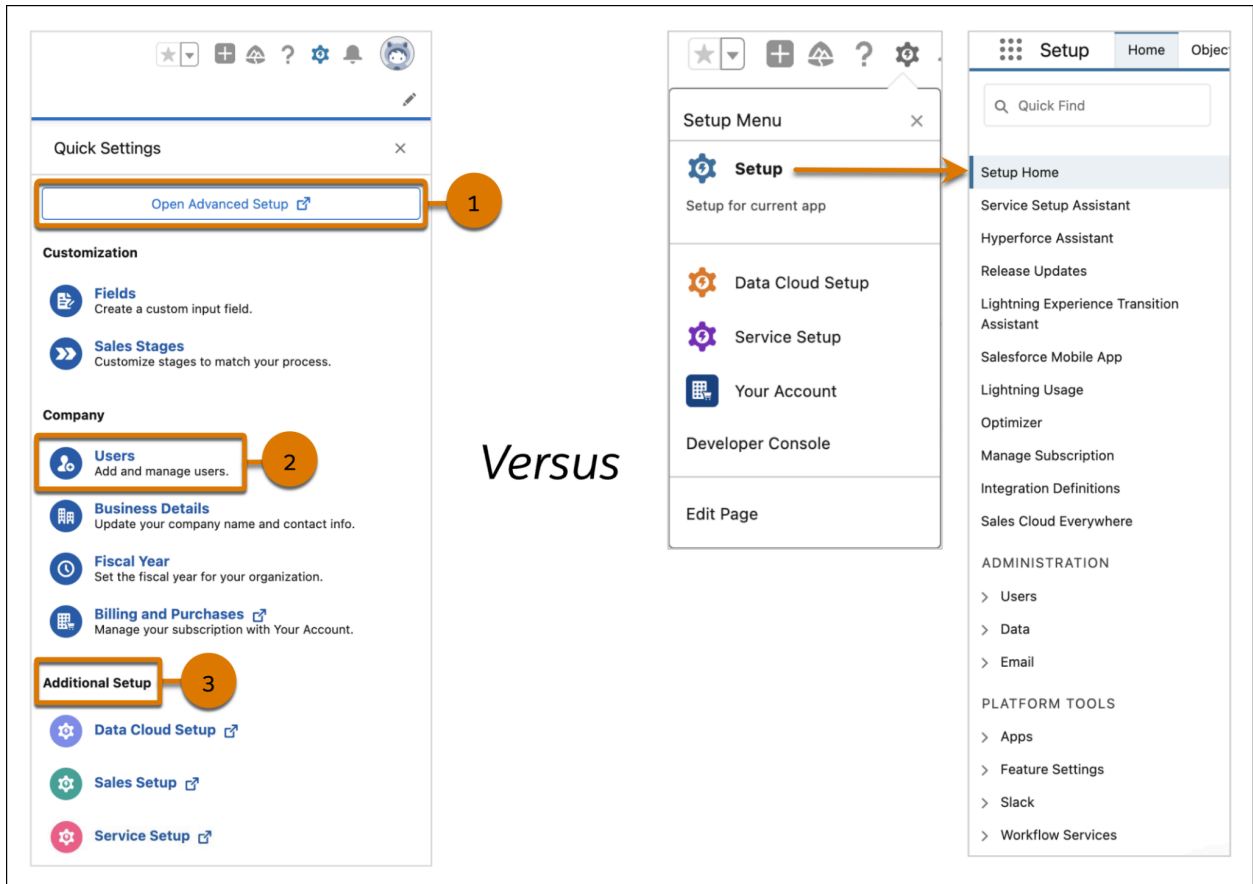



In addition, Salesforce Foundations provides dedicated apps for account and contact management. Salesforce admins can assign these apps to users, and users can add them to the vertical navigation bar.

## Quick Settings

The traditional Setup navigation offers a comprehensive range of options, which can feel visually overwhelming. That's why Salesforce Foundations provides Quick Settings, a streamlined way for admins to complete the most common setup and customization tasks without navigating through the entire navigation list.

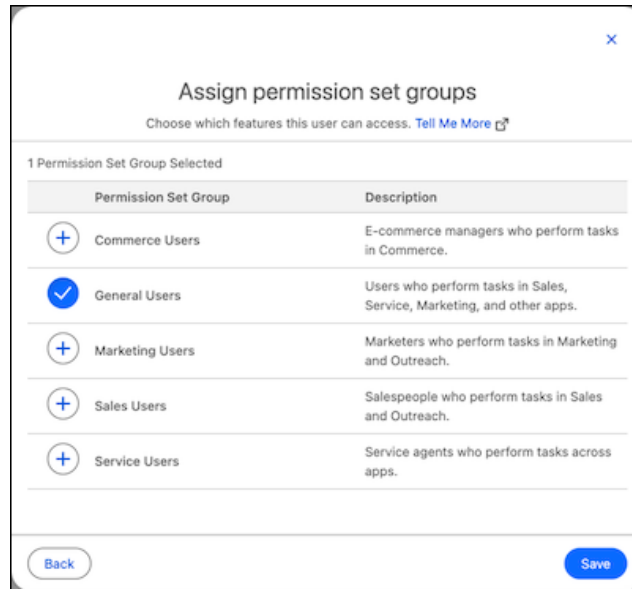




Quick Settings provides you with the most common setup, customization, and company settings, readily accessible from the  icon. And for those moments when you need more settings, click the **Advanced Settings** button to access the complete list of configuration settings (1).

Another benefit of Quick Settings is that you can manage and assign permission set groups right from the Users setting (2). In just a few clicks, you can tailor access with Salesforce Foundations permission set groups for your Sales, Service, Marketing, and Commerce teams. You can also assign custom permission set groups from this window.

Use the quick links under Additional Setup to easily get to other product-specific setup pages, such as Data Cloud Setup, Sales Setup, and Service Setup (3).



See Also

- [Getting Started](#)
- [User Management in Starter and Pro Suite](#)

## Full Control over Enablement and Honoring Your Customizations

If you're a Sales or Service Cloud customer, you have full control over when and what you enable for your Salesforce org. Your preexisting customizations aren't impacted by enabling Salesforce Foundations.

Ready to turn on Salesforce Foundations? See [Knowing Which Salesforce Foundations Features You Can Turn On](#) and [Set Up Salesforce Foundations](#).

## Supported Editions for Salesforce Foundations

Salesforce Foundations is available for these product areas.

- Sales Cloud
- Service Cloud
- Sales and Service Cloud

Salesforce Foundations is available for these editions.

- Enterprise Edition
- Unlimited Edition
- Einstein 1 Sales Edition
- Einstein 1 Service Edition

These feature updates apply to Lightning Experience and Salesforce Classic. User interface improvements are only available in Lightning Experience.



**Note:** Salesforce Foundations isn't available for customers with Industries solutions.

# Included Features in Salesforce Foundations

Explore the features that come with Salesforce Foundations.

## Marketing

Reach new audiences and engage with people who follow your brand. With the Marketing app, get streamlined access to powerful tools such as flows and segments that help you build effective campaigns.




**Note:** Marketing for Salesforce Foundations availability varies per region. Contact your Salesforce account executive for more information.

These Marketing features are included with Salesforce Foundations:



Feature	How You Use It	Resources
Campaigns	Plan and measure the effectiveness of your marketing efforts.	<a href="#">Salesforce Help: Promote My Business</a>
Segments	Categorize your customers and improve marketing engagement.	<a href="#">Salesforce Help: Marketing Segments</a>
Flows and Flow Templates	Use flows to automate content distribution and data collection for your campaigns.	<a href="#">Salesforce Help: Segment-Triggered Campaign Flows</a> <a href="#">Salesforce Help: How Campaigns and Flows Work Together</a>
Einstein Send Time Optimization (STO)	Make sure messages reach customers when they're most likely to engage.	<a href="#">Salesforce Help: Model Card: Einstein Send Time Optimization</a>

## Commerce

Boost your sales with direct-to-consumer (D2C) online stores. Take advantage of the store templates to create and customize your store. Define customer experiences, including search, carts, and checkouts. Get paid faster. When an opportunity closes, you can generate secure payment links for customers from the Sales Opportunity page.

 **Note:** Commerce for Salesforce Foundations availability varies per region. Contact your Salesforce account executive for more information. Pay Now isn't available to Salesforce customers in India, Brazil, or Japan.

These Commerce features are included with Salesforce Foundations. Refer to the D2C content only for the resources provided.

Feature	How You Use It	Resources
Storefront  <b>Note:</b> This feature will be available later this year.	Create a seamless shopping experience across mobile and web. Launch your D2C online store with easy, guided steps.	<a href="#">Salesforce Help: Sites and Storefronts</a> <a href="#">Trailhead: Salesforce Commerce Basics</a>
Pay Now	Create secure payment processing for your opportunities.	<a href="#">Trailhead: Salesforce Pay Now</a> (see Pay Now with Salesforce Starter)
Search and SEO  <b>Note:</b> This feature will be available later this year.	Drive more traffic to your D2C online store and make sure customers can easily find products.	<a href="#">Salesforce Help: Store Search</a> <a href="#">Salesforce Help: SEO for Commerce</a>

## Data Cloud

Salesforce Foundations comes with Data Cloud to unify your data, power your segmentation, and make sure your structured and unstructured data is integrated and AI-ready. Additionally, Data Cloud helps you manage marketing consent data and create targeted audiences for campaigns. It also powers features so you can send online store order confirmation emails and marketing messages.

These Data Cloud features are included with Salesforce Foundations:

Feature	How You Use It	Resources
Segmentation	Break down your data to understand, target, and analyze your customers.	<a href="#">Salesforce Help: Segmentation</a> <a href="#">Trailhead: Segmentation and Activation</a>
Unified Profile	Consolidate data into one view	<a href="#">Salesforce Help: Unify Source</a>

	to better understand and engage with your customers.	<a href="#">Profiles</a>
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## Service

Provide personalized support to your customers, improve agent productivity, and deliver faster resolutions. Track customer support issues, share helpful information, and communicate with customers directly from your CRM. Each activity with your customers is available for reference so you or anyone on your service team can jump in with the most up-to-date information to help your customers.

These Service features are included with Salesforce Foundations:

Feature	How You Use It	Resources
Foundations Service Console	Track customer support issues, share helpful information, and communicate with customers directly from your CRM.	<a href="#">Salesforce Help: Solve Customer Issues Faster</a>
Knowledge Management	Save time searching for information and provide accurate help articles to your customers.	<a href="#">Salesforce Help: Create a Knowledge Base with Salesforce Knowledge</a> <a href="#">Trailhead: Knowledge Basics for Lightning Experience</a>
Omni-Channel Routing	Assign cases to the right agents based on availability and expertise.	<a href="#">Salesforce Help: Route Work with Omni-Channel</a> <a href="#">Trailhead: Omni-Channel for Lightning Experience</a>
Email-to-Case	Track email conversations related to customer support cases.	<a href="#">Salesforce Help: Email-to-Case Threading</a>
Macros	Complete repetitive or complex tasks with one click.	<a href="#">Salesforce Help: Automate Repetitive Tasks with Macros</a> <a href="#">Trailhead: Macros for Agents</a>

## Sales

Take advantage of the same sales features that you already have. Manage your leads, opportunities, and customer interactions in the Sales Console. Efficiently track tasks and use forecasting tools for informed decision-making. Take control of your entire sales pipeline, from prospecting to closing.

These Sales features are included with Salesforce Foundations:

Feature	How You Use It	Resources
Opportunity management	Manage your sales deals that are in progress.	<a href="#">Salesforce Help: Opportunities</a> <a href="#">Trailhead: Leads and Opportunities</a>
Account management	Store contact information about the groups or companies that you do business with.	<a href="#">Salesforce Help: Accounts</a> <a href="#">Trailhead: Accounts and Contacts</a>
Contact management	Store information about people who you do business with.	<a href="#">Salesforce Help: Contacts</a> <a href="#">Trailhead: Accounts and Contacts</a>
Lead management	Track information about your potential customers.	<a href="#">Salesforce Help: Leads</a> <a href="#">Trailhead: Leads and Opportunities</a>

## User Interface Improvements

These apps and user interface features are included with Salesforce Foundations:

Feature	How You Use It	Resources
Home app	Keep up with recent activity and personalize cards that appear to quickly access the most important things to you. Get activity suggestions to boost productivity.	<a href="#">Salesforce Help: Getting Started</a>
Vertical navigation bar	Switch between apps more easily for an improved navigation experience.	
Accounts app	Use accounts to store information about customers or individuals you do business with.  Salesforce Foundations provides a dedicated app for accounts,	

	which you can add to the vertical navigation bar.	
Contacts app	Use contacts to store information about the people you do business with. Contacts are most often associated with an account but can also be associated with other records such as opportunities.  Salesforce Foundations provides a dedicated app for contacts, which you can add to the vertical navigation bar.	
Quick Settings	Access the most frequently used setup tools or access other advanced options.	<a href="#">Salesforce Help: Setup Best Practices</a> <a href="#">Quick Settings</a>

## Knowing Which Salesforce Foundations Features You Can Turn On

The combination of your Salesforce product, product edition, and org status determines what Salesforce Foundations features you can turn on to enhance your Salesforce experience.

Use the information in this table to determine the Salesforce Foundations features you can turn on:

If Your Salesforce Product Is...	And Your Edition Is...	And Your Org Status Is...	You Can Turn On...
Sales Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Upgraded from Starter	Service
Sales Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Upgraded from Pro Suite	Nothing to turn on. You have access to the entire feature set for Salesforce Foundations.
Sales Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Not an upgrade from Starter or Pro Suite	<ul style="list-style-type: none"> <li>• User interface enhancements</li> <li>• Service</li> <li>• Marketing</li> <li>• Commerce</li> <li>• Data Cloud tools</li> </ul>
Service Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Upgraded from Starter	Nothing to turn on. You have access to the

			entire feature set for Salesforce Foundations.
Service Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Upgraded from Pro Suite	Nothing to turn on. You have access to the entire feature set for Salesforce Foundations.
Service Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Not an upgrade from Starter or Pro Suite	<ul style="list-style-type: none"> <li>• User interface enhancements</li> <li>• Sales</li> <li>• Marketing</li> <li>• Commerce</li> <li>• Data Cloud tools</li> </ul>
Sales and Service Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Upgraded from Starter	Service
Sales and Service Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Upgraded from Pro Suite	Nothing to turn on. You have access to the entire feature set for Salesforce Foundations.
Sales and Service Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Not an upgrade from Starter or Pro Suite	<ul style="list-style-type: none"> <li>• User interface enhancements</li> <li>• Marketing</li> <li>• Commerce</li> <li>• Data Cloud tools</li> </ul>

See Also

- [Salesforce Editions](#)
- [Find Your Edition](#)

## Considerations for Salesforce Foundations

Before deploying Salesforce Foundations, make sure you review key factors that can affect your implementation.




### Setup Considerations

When planning your Salesforce Foundations implementation, you have the flexibility to choose which features to turn on, whether it's the entire suite or a tailored subset.

After you turn on foundational features for Sales Cloud, Service Cloud, Marketing Cloud, and Commerce Cloud, you can't turn them off again. You can turn off user interface improvements, such as Quick Settings and the vertical navigation bar. See [User Interface and Navigation Enhancements](#).



## User Interface Settings Considerations

- In Starter and Pro Suite editions, Quick Settings and the vertical navigation bar are turned on by default. If you upgraded from Starter or Pro Suite to another edition, these settings remain turned on unless you turn them off in Setup.
- If you turn on Quick Settings, only users with the Customize Application and Modify All Data permissions see  and can access Setup. If a user previously accessed  via the View Setup and Configuration permission, they now need the Customize Application and Modify All Data permissions to access Setup.
- All users see the vertical navigation bar if this setting is turned on. They can customize the apps they have access to and the order in which they appear.
- If the vertical navigation bar is turned on, the App Launcher icon (  ) disappears from the horizontal navigation bar. To access App Launcher, click **More** from the vertical navigation bar.

## Service Console Considerations

Service console is the app where customer service agents and supervisors work. Service Cloud comes with different versions of the service console. In addition to the general considerations for choosing a console version, consider these guidelines for Salesforce products with Salesforce Foundations.

- If you haven't chosen a service console version, we recommend that you use the Foundations Service Console.
- Consider only the console versions that support Salesforce products with Salesforce Foundations. See [Supported Service Console Versions for Salesforce Foundations](#).



See Also

- [Choosing the Right Service Console Version](#)

## Supported Service Console Versions for Salesforce Foundations

Compatible console versions depend on your Salesforce org's initial edition and any subsequent upgrades to other editions.

This table indicates which service console versions are supported (S) and which is available (A) by default under various scenarios. The available service console is automatically created for you.

Scenario	Foundations Service Console	Service Setup Assistant Console	Lightning Service Console
Existing Sales Cloud Enterprise or Unlimited Edition	S, A	S	
Existing Service Cloud Enterprise or Unlimited Edition		S	S, A

Existing Sales and Service Cloud Enterprise or Unlimited Edition	×	S	S, A
Upgraded from Pro Suite to a supported edition in Sales or Service Cloud (applies specifically to Salesforce orgs created before August 21, 2024 in North America or August 22, 2024 in other regions)	S, A	S	×
Upgraded from Pro Suite to a supported edition in Sales or Service Cloud (applies specifically to Salesforce orgs created on or after August 21, 2024 in North America or August 22, 2024 in other regions)	S, A	×	×
Upgraded from Starter to a supported edition in Sales Cloud, Service Cloud, or Sales and Service Cloud	S, A	×	×

## Marketing Considerations

Marketing for Salesforce Foundations gives you access to tools that help you collect, track, and store consent data. You must enable Consent Management and Individual Creation settings so you can use tools for tasks, such as importing consent data. When you agree to add Salesforce Foundations to your org, the Consent Management and Individual Creation settings are automatically enabled. After these settings are enabled, if you want to disable these settings, contact Salesforce Customer Support.

## Data Cloud Considerations

Data Cloud powers campaign segmentation and unified customer profiles for marketing and commerce use cases in Salesforce Foundations. With Data Cloud, users can take advantage of flexible consent data tools and create audiences for order confirmation emails and marketing messages.

Salesforce Foundations requires a compatible Data Cloud license. If you're operating under a Customer Data Platform license, contact your Salesforce account executive. To determine whether you have a Customer Data Platform license, see [View and Manage Your Permission Set Licenses](#).

Although the Segments tab in the Marketing app is also available in the Data Cloud app, there are some differences to consider. Segments used with campaign flows in the Marketing app must use the default data space and segment on the Unified Individual object. If you upgraded from Starter or Pro Suite to another edition, we recommend that you continue to use the default data space and segment on the Unified Individual object to avoid issues.

To build segments with custom objects and fields, you must enable additional permissions. After you set up Data Cloud tools for Salesforce Foundations, see [Enable Object and Field Permissions to Access Salesforce CRM in Data Cloud](#) and [Create a Salesforce CRM Data Stream](#).

## Allocations for Salesforce Foundations

Review important allowances.

- Enterprise Edition customers refer to [Salesforce Enterprise Edition Allocations](#).
- Unlimited Edition customers refer to [Salesforce Unlimited Edition Allocations](#).
- For allocations related to foundational service, marketing, and commerce functionality, refer to [Salesforce Pro Suite Edition Allocations](#).

See [Salesforce Editions](#) and [Find Your Edition](#).

# SET UP SALESFORCE FOUNDATIONS

After you've reviewed the considerations and determined which foundational features to add, you're ready to set up the suite experience. Turn on user interface and navigation settings, assign permissions to users, and set up features across Sales Cloud, Service Cloud, Marketing Cloud, Commerce Cloud, and Data Cloud.

## User Interface and Navigation Enhancements

Learn how to turn on the user interface features that come with Salesforce Foundations. Boost your productivity with simplified navigation and manage app visibility for your users.

### Turn On Quick Settings

Easily access important settings such as user management and business details in a few clicks.

#### USER PERMISSIONS

To modify user interface settings:

- Customize Application



1. From Setup, in the Quick Find box, enter Interface, and then select **User Interface**.
2. Select **Show the Quick Settings Panel** and save.

See Also

- [Improved Navigation and Easy Access to Important Tasks](#)
- [User Interface Settings Considerations](#)

# Turn On the Vertical Navigation Bar

Get to your favorite apps seamlessly with the vertical navigation bar. After you turn it on, all users can customize the apps included in the navigation bar, open apps without refreshing the page, and access App Launcher from the More button.

## USER PERMISSIONS

To modify user interface settings:

- Customize Application
  1. From Setup, in the Quick Find box, enter Interface, and then select **User Interface**.
  2. Under User Interface, select **Show Lightning vertical navigation**. Selecting this setting also selects the **Enable Seamless App Switching in Lightning Experience Vertical Navigation** setting.
  3. Save.

After you turn on the vertical navigation bar, review the corresponding Salesforce documentation to give users access to apps. Users sometimes need to refresh or log out and back in to Salesforce to see changes.

See Also

- [Improved Navigation and Easy Access to Important Tasks](#)
- [User Interface Settings Considerations](#)

# Give Users Access to the Home, Accounts, and Contacts Apps

Grant access to the Home, Accounts, and Contacts apps. To streamline navigation, we recommend you also turn on vertical navigation settings.

## USER PERMISSIONS

To edit app visibility settings:

- Manage Profiles and Permission Sets



**Note:** If you prefer managing app access with profiles, assign the Home, Accounts, and Contacts apps from profile settings. Assign the Home app as the default app for a cross-app view.

1. From Setup, in the Quick Find box, enter Manager, and then select **App Manager**.
2. Click the action menu next to the app you want to assign, and then select **Edit**.
  - a. Home (developer name: EasyHome)
  - b. Accounts (developer name: EasyAccounts)
  - c. Contacts (developer name: EasyContacts)
3. From the User Profiles tab, select the user profiles you want to grant access to the app and save.

See Also

- [View and Edit Assigned Apps in Profiles](#)

- [Improved Navigation and Easy Access to Important Tasks](#)
- [Turn On the Vertical Navigation Bar](#)

## Permission Set Groups for Salesforce Foundations

Give users access to Service Cloud, Marketing Cloud, Commerce Cloud, and Data Cloud for Salesforce Foundations. To save you time on permission assignment, Salesforce Foundations comes with standard permission set groups. These permission set groups are made up of standard permission sets that grant users access to common features and functionality based on user jobs. If you prefer permission sets for user management, assign the standard permission sets instead. To grant users access to other foundational features, review the corresponding Salesforce documentation.

### Salesforce Foundations Standard Permission Set Groups

Salesforce Foundations comes with standard permission set groups that bundle standard permission sets by user jobs for faster and easier user management. If you enable Quick Settings, assign these standard permission set groups from the user management window. If you don't enable Quick Settings, assign them from the permission set group page in Setup.

If you upgraded from Starter or Pro Suite to other editions, the permission set groups you assigned to users remain the same. See [User Permissions in Starter and Pro Suite](#).


Permission Set Group	Description
General User	Grants users access to all the assigned apps and permissions included in the Service User, Marketing User, and Commerce User permission set groups.
Service User	Grants users access to the preconfigured service console app and common service tasks, such as knowledge management.
Marketing User	Grants users access to the Marketing app and common marketing tasks, such as campaign management.
Commerce User	Grants users access to the Commerce app and common tasks, such as payment method management.

See Also

- [Assign Standard Permission Set Groups From Quick Settings](#)
- [Assign Permission Set Groups to Users](#)
- [Permission Set Groups and Combined Permissions View](#)

## Salesforce Foundations Standard Permission Sets

Salesforce Foundations comes with standard permission sets that grant users access to apps and common permissions for features. Assign these permission sets from the permission set or user detail page in Setup. For faster assignment, use the standard permission set groups.

 **Note:** These permission sets are automatically updated as new features become available. We recommend that you assign standard permission sets, individually or via the standard permission set groups, to make sure users have access to all features and functionality.

Permission Set	What It Gives Access To	Included in These Permission Set Groups
Service Starter app	Preconfigured Service Console	General User and Service User
Lightning Knowledge Manager	Salesforce Knowledge management	General User and Service User
Macros Manager	Macros management	General User and Service User
Marketing Starter app	Marketing app	General User and Marketing User
Marketing Manager	Campaigns, segments, and campaign flows management	General User and Marketing User
Commerce Starter app	Commerce app	General User and Commerce User
Payments Administrator	Payments administrative tasks, such as merchant account and payment method set management	General User and Commerce User

See Also

- [Standard Permission Sets](#)
- [View Permissions Enabled in a Permission Set or Permission Set Group](#)
- [Manage Permission Set Assignments](#)

## Assign Permission Set Groups from Quick Settings

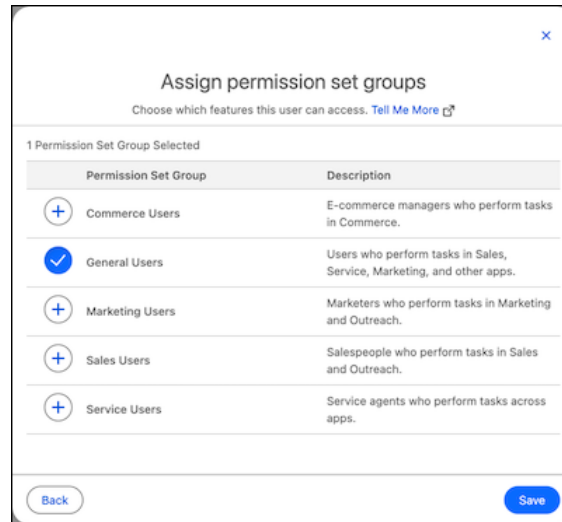
In Quick Settings, assign permission set groups in a few clicks.

### USER PERMISSIONS

To assign permission set groups from Quick Settings:

- Assign Permission Sets
- Customize Application

- Manage Users
- Modify All Data
- View Setup and Configuration



### Add a User and Assign Permissions

1. Click to open the Quick Settings panel.
2. Click **Users**.
3. Click **New User**.
4. Add user details and click **Next**.
5. Select each permission set group to assign to the user and save.

### Edit a User's Permissions

1. Click to open the Quick Settings panel.
2. Click **Users**.
3. Click the action menu next to the user's name and click **Edit User**.
4. Click **Next**.
5. Select each permission set group to assign to the user and save.

### See Also


- [Assign Permission Set Groups to Users](#)
- [Turn on Quick Settings](#)

## Sales for Salesforce Foundations

If you have one of the supported editions, you have the foundational Sales features that come with Salesforce Foundations, and no setup is required. Review user interface and navigation settings that can help your sales teams work more efficiently. If you upgraded from Starter or Pro Suite to another edition, you keep foundational Sales features and previous permission set group assignments.



Boost your sales productivity with Salesforce Foundations navigation and user interface features.

With Quick Settings, customize sales stages to fit your processes in a few clicks. Click  to open the Quick Settings panel, and then select **Sales Stages**. Manage customer relationships more efficiently with the vertical navigation bar, Accounts app, and Contacts app. These navigation settings help you quickly find and update information about your customers and their businesses. See [Improved Navigation and Easy Access to Important Tasks](#).

If you upgraded from Starter or Pro Suite to a supported edition in Sales Cloud, review the additional sales features your users can access. See the [Sales Pricing Guide](#) and corresponding Salesforce documentation for each feature. To get started, we've included links to features that other customers have found helpful to drive more sales.

See Also

- [Supported Editions for Salesforce Foundations](#)
- [Drive Predictable Revenue with Pipeline Inspection](#)
- [Focus on the Right Deals with Einstein Opportunity Scoring](#)
- [Get Insights and Trends from Calls with Einstein Conversation Insights](#)
- [Help Sales Teams Collaborate on Deals with Opportunity Teams](#)
- [Visualize Your Contacts Across Company Levels with the Buyer Relationship Map](#)

## Set Up Service for Salesforce Foundations

Assign the General User or Service User permission set group. These permission set groups grant users access to foundational Service features like the preconfigured Service Console.



**Note:** If you upgraded from Starter or Pro Suite to another edition, permission set group assignments remain the same. If you upgraded from Starter to another edition, all users added from the Quick Settings panel automatically get access to the service console via the General User permission set group.

If you prefer using permission sets instead of permission set groups, assign the Service Starter App, Lightning Knowledge Manager, and Macros Manager permission sets.

1. Assign the General User or Service User permission set group to users.
  - If Quick Settings is turned on, see [Assign Standard Permission Set Groups from Quick Settings](#).
  - If you want to assign permissions from Setup, see [Assign Permission Set Groups to Users](#).
2. If you upgraded from Starter to another edition, enable Chatter. Chatter is needed to enable Case Feeds, which helps users track case activity.
  - a. In Setup, in the Quick Find Box, enter Chatter, and then select **Chatter Settings**.
  - b. Enable Chatter Settings and save.

If you have Enterprise or Unlimited Edition in Sales Cloud, or Einstein 1 Sales Edition, see [Set Up Service Cloud Basics](#) to continue configuring features.

If you upgraded from Starter or Pro Suite to a supported edition in Service Cloud, review the additional service features and enhancements you can access. See the [Service Pricing Guide](#) and corresponding Salesforce documentation. To get started, we've included links to features that other customers have found helpful to enhance their customer service.

See Also

- [Set Up a Help Center with a Guided Setup Flow](#)
- [Suggest Knowledge Articles with Einstein Article Recommendations](#)
- [Autofill Case Fields with Einstein Case Classification Apps](#)
- [Supported Editions for Salesforce Foundations](#)

## Set Up Data Cloud Tools for Salesforce Foundations

Set up Data Cloud tools so you can create targeted audiences for order confirmation emails and marketing messages. An identity resolution ruleset helps make sure your customer consent preferences for marketing sends are respected.

### USER PERMISSIONS

To set up a Data Cloud admin, assign user permissions, and create an identity resolution ruleset:

- Permissions vary by task. Verify the permissions required in related Salesforce documentation.
1. Assign yourself the Data Cloud Marketing Admin permission set. See [Set Up a Data Cloud Admin](#).
  2. If you upgraded from Starter or Pro Suite to another supported edition, no additional steps are needed. If you didn't upgrade from Starter or Pro Suite to another edition, continue to the next step.
  3. Assign yourself the General User or Marketing User permission set group.
    - If Quick Settings is turned on, see [Assign Standard Permission Set Groups from Quick Settings](#).
    - If you want to assign permissions from Setup, see [Assign Permission Set Groups to Users](#).
  4. Create an Identity Resolution Ruleset.

This ruleset organizes and unifies your data for marketing sends and reporting.

    - a. In the Marketing app, on the Identity Resolutions tab, click **New**.
    - b. Select the default data space and select **Individual** for the Primary Data Model Object.
    - c. Name the ruleset and save.
    - d. On the identity resolution record, in the Match Rules section, click **Configure**.
    - e. Select a default or custom match rule.
    - f. Edit or add criteria for your match rule and save.
      - i. Include Contact Point Email Address (Exact Normalized) in the match criteria. This is a critical step to help make sure your customer consent preferences

are respected.

After you set up Data Cloud tools, see [Set Up Marketing](#).

See Also

- [Data Cloud Considerations](#)
- [Default and Custom Match Rules](#)
- [About Salesforce Data Cloud](#)

## Set Up Marketing for Salesforce Foundations

Configure the required email settings and give users access to the Marketing app.

### USER PERMISSIONS

To set up Data Cloud tools, edit page layouts, and assign user permissions:

- Customize Application
- Other permissions vary by task. Verify the permissions required in related Salesforce documentation.

Before you send marketing emails, make sure your leads and contact records include an opt-in, opt-out status in the Privacy Consent Status field. If you prefer using permission sets instead of permission set groups, assign the Marketing Starter App and Marketing Manager permission sets.

1. Verify Data Cloud tools are set up.  
These tools help users manage consent data and create targeted audiences for campaigns.  
See [Set Up Data Cloud Tools](#).
2. Configure required email settings and grant users access to the Marketing app.  
See [Set Up Marketing](#).

After you set up Marketing for Salesforce Foundations, review [What's Included in Salesforce Foundations - Marketing](#) and corresponding Salesforce documentation.

See Also

- [Marketing Considerations](#)

## Set Up Commerce for Salesforce Foundations

After setting up Data Cloud tools and Marketing for Salesforce Foundations, assign users access to the Commerce app and features.

### USER PERMISSIONS

To set up Data Cloud tools, set up Marketing, and assign user permissions:

- Permissions vary by task. Verify the permissions required in related Salesforce documentation.

If you prefer using permission sets instead of permission set groups, assign the Commerce Starter App and Payments Administrator permission sets.

1. Assign the Commerce User or General User permission set group to users.
  - If Quick Settings is turned on, see [Assign Permission Set Groups From Quick Settings](#).
  - If you want to assign permissions from Setup, see [Assign Permission Set Groups to Users](#).
2. From the Commerce app, select **Review Terms and Enable**.
3. Read the terms and conditions and confirm by selecting **Agree and Enable**.
4. Reload the page to view the results.
5. Select **Set Up Pay Now**.
6. Follow the guided setup to complete your Stripe merchant account, define payment methods, and brand your Pay Now page with your logo.  
Credit cards are the default payment method for the merchant account, but you can add more payment methods during setup. You can also enable manual capture of payments.

After you set up Commerce for Salesforce Foundations, review the guidance in the **Pay Now** tab to create payment links for customers.