salesforce

Lightning Platform Glossary

Salesforce, Spring '21

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Last updated: December 16, 2020

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LIGHTNING PLATFORM GLOSSARY

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This glossary defines terms that appear throughout the Lightning Platform documentation suite.

A

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.

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*.

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.

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.

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 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.

Apex Controller

See Controler, 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 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.

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.

Auto Number

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

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.

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.

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.

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.

C

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.

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.

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.

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.

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 Salesforce extensions for Visual Studio Code 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.

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.

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.

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.

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.

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.

Custom App

See App.

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 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.

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.

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`.

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.

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.

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.

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 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.

Developer Sandbox

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

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.

Document Library

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

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 Template

A form email that communicates a standard message, such as a welcome letter to new employees or an acknowledgment 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.

Note: Lightning email templates aren’t packageable.

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.

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.

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.

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.

Field

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

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.

Filter Condition/Criteria

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

Flex Toolkit for Lightning Platform

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

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.

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.

Salesforce Extensions for Visual Studio Code

The Salesforce extension pack for Visual Studio Code includes tools for developing on the Salesforce platform in the lightweight, extensible VS Code editor. These tools provide features for working with development orgs (scratch orgs, sandboxes, and DE orgs), Apex, Aura components, and Visualforce.

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.

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.

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

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.

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 groups 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.

H

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.

Home Organization

The organization used for retrieving components to a local file system. If using the Salesforce extensions for Visual Studio Code, 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.

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.

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.

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.

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.

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.

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.

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.

L

Layout
See Page Layout.

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.

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.

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.

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 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.

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 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

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 Salesforce extensions for Visual Studio Code 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.

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 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.

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.

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.

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.

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.

Multi-Select Picklist
See Picklist (Multi-Select).

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

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.

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.

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.

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.

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.

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.

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.

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.

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 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.

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.

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.

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.

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.

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.

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.

Printable View

An option that displays a page in a print-ready format.

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.

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.

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.

Project
See Local Project.

Project Manifest
A control file (`package.xml`) that determines which components are retrieved or deployed. See also Local Project.

Prototype
The classes, methods and variables that are available to other Apex code.

Provider Organization
When using the cross-org adapter for Salesforce Connect, the provider org stores the data that's accessed by the subscriber org.

Publisher
The publisher of an AppExchange listing is the Salesforce user or organization that published the listing.

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.

Q

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
```

Queue
A holding area for items before they are processed. Salesforce uses queues in a number of different features and technologies.

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.)

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 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 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.

Recycle Bin

A page that lets you view and restore deleted information. Access the Recycle Bin either by using the link in the sidebar in Salesforce Classic or from the App Launcher in Lightning Experience.

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 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 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.

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.

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.

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

SaaS

See Software as a Service (SaaS).

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.

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 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.

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.

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.

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.

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.

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.

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.

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 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.

sObject

The abstract or parent object for all objects that can be stored in the Lightning Platform.

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.

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.

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.

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`.

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.

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.*

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 Salesforce extensions for Visual Studio Code.

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.

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.

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.

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.

U

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.

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.

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 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.

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 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.

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 `CCritical Section` 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.

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.