Learn Salesforce Basics

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LEARN SALESFORCE BASICS

Welcome, Salesforce Users

Available in: **All** Editions

Welcome to Salesforce! This documentation, designed for end users and administrators, introduces Salesforce and its key concepts, provides an overview of products and editions, and guides you through setting yourself up as a user. You'll also find information about common tasks you'll perform in Salesforce—like using basic Chatter features, running reports, or searching Salesforce for the information or records you need. For details about specific Salesforce features, such as sales, service, Chatter, or analytics; or guidance on setting up Salesforce, see Learning About Salesforce Features or go to http://www.salesforce.com/.

GET TO KNOW SALESFORCE PRODUCTS

What's New in Salesforce?

Preview Winter '14 Release

For a preview of features that will be available in Winter '14, the preview release notes are available here: Winter '14 Release Notes

Current Release

The latest release includes new features for sales, support, marketing, and Chatter users as well as enhancements to the platform. For more information, visit the Summer '13 community page.

For a complete listing of new features along with implementation tips and best practices, see:

- Summer '13 Release Notes
- Force.com Connect for Lotus Notes Release Notes
- Force.com Connect for Office Release Notes
- Force.com Connect Offline Release Notes
- Force.com Connect for Outlook Release Notes
- Salesforce for Outlook Release Notes
- Database.com Release Notes

Past Releases

For information about new features introduced in previous releases, see:

- Spring '13 Release Notes
- Winter '13 Release Notes
- Summer '12 Release Notes
- Spring '12 Release Notes
- Winter '12 Release Notes
- Summer '11 Release Notes
- Spring '11 Release Notes
- Winter '11 Release Notes
- Summer '10 Release Notes
- Spring '10 Release Notes
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- Summer '09 Release Notes
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- Summer '08 Release Notes
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- Summer '07 Release Notes
- Spring '07 Release Notes
- Force.com Mobile 7.0 for BlackBerry Release Notes
- Force.com Mobile 6.1 for Windows Mobile 5 Release Notes
- Winter '07 Release Notes
- Summer '06 Release Notes
- Winter '06 Release Notes
- Force.com Mobile 6.0 Release Notes
- Summer '05 Release Notes
- Winter '05 Release Notes
- Summer '04 Release Notes
- Spring '04 Release Notes
- Winter '04 Release Notes

Product Overview

Your Salesforce edition determines which features and functionality you can access. To find out which edition you're using, look at the browser tab or title.

Welcome to the award-winning cloud-computing service— designed to help you manage your customer relationships, integrate with other systems, and build your own applications. Salesforce includes the following products and services.

Salesforce Applications

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

Force.com Platform

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

Database.com

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

AppExchange

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

Salesforce.com Community

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

Key Concepts and Terms

Available in:

As you're getting up to speed with Salesforce, it's helpful to learn some key concepts and terms. They'll come up frequently as you interact with the product, our documentation, and our service professionals. The concepts here will help you understand how Salesforce works. And the terms will help you understand some of its main components.

Concepts

Concept	Definition
Cloud	Salesforce's name for a loose federation of features that help you accomplish certain types activities, such as selling products, supporting your customers, or collaborating with your coworkers. Two common examples you'll come across are "Service Cloud" and "Sales Cloud".
Cloud Computing	Technology that enables Internet-based services that let you sign up and log in through a browser. Salesforce delivers its service in the cloud. Other familiar cloud computing services include Google Apps and Amazon.com.
Software as a Service / SaaS	Software delivered not by traditional means (such as on disk) but in the cloud, as a service. There's nothing to download or install, and updates are automatic.

Concept	Definition
Trust / trust.salesforce.com	Salesforce's term for its companywide commitment to building and delivering the most secure, fast, and reliable cloud-based service available. Created to enhance customer success, `trust.salesforce.com` is a systems status website giving Salesforce customers and the community access to real-time and historical system performance information and updates, incident reports and maintenance schedules across all its key system components. . `trust.salesforce.com` is free of charge to all members of the Salesforce community

Terms

Term	Definition
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 Call Center. You can customize the standard **apps** to match the way you work.
Edition	One of several bundles of Salesforce products and services, each geared toward a different set of business needs. All Salesforce editions share the same look and feel, but they vary by feature, functionality, and pricing.
Object	A definition of a specific type of information you can store in Salesforce. For example, the Case object allows you to store information about customer inquiries. For each object, your organization will have multiple, specific records. Salesforce comes with lots of standard objects, but you can create custom objects, as well.
Organization / Org	A deployment of Salesforce that has a defined set of licensed users. Your organization includes all of your data and applications, and is separate from all other organizations.
Record	A collection of fields that store information about a specific item of a specific type (represented by an object), such as a contact, an account, or an opportunity. For example, you might have a contact record to store information about Joe Smith, and a case record store information about his training inquiry.
Release	Salesforce releases new products and features three times per year, and releases are identified by season—Winter, Spring, and Summer—along with the calendar year. For example: "Winter '13". Each time we produce a release, in the Salesforce release notes, we document new features and products that are generally

Term	Definition
	available or in beta release, plus all changes to existing features and products. To find and download the release notes, just , search for "Release Notes" in the Salesforce online help.
Salesforce	The name of Salesforce's cloud computing CRM service.
salesforce.com	The company name.

EDITIONS

Salesforce Edition Overview

Your Salesforce edition determines which features and functionality you can access. To find out which edition you're using, look at the browser tab or title.

Salesforce.com offers several bundles of its products and services, each geared toward a different set of business needs. These bundles, called *editions*, all share the same look and feel, but they vary by feature, functionality, and pricing. For example, a feature that is available in Professional Edition for an additional fee may be included in Enterprise Edition. You might choose to start with a more basic edition, then upgrade later as you grow your business.

For a comparison chart of editions and their features, see the Salesforce Pricing and Editions page.

Note: The Salesforce online help describes all generally available features, including those that are not available in all editions. To find out whether a feature is available in your edition, search for the feature in the help, they check out the "Available in:" table at the top of any topic you find for that feature.

See Also:

Salesforce Mobile Products Overview

Contact Manager Edition

Salesforce

Contact Manager is designed for small businesses and provides access to key contact management features including accounts, contacts, activities, calendars, notes and attachments, and reports. Contact Manager also provides straightforward and easy-to-use customization options. For more information about Contact Manager features, visit the Salesforce Pricing & Editions page.

See Also:

Salesforce Edition Overview

Group Edition

Salesforce Group Edition is designed for small businesses and workgroups with a limited number of users. Group Edition users can manage their customers from the start of the sales cycle through closing the deal to providing customer support and service. Group Edition offers access to accounts, contacts, opportunities, leads, cases, dashboards, and reports. For more information about Group Edition features, visit the Salesforce Pricing & Editions page.

See Also:

Salesforce Edition Overview

Developer Edition

Salesforce

Developer Edition provides access to the Force.com platform and API. It allows developers to extend the Salesforce system, integrate with other applications, and develop new tools and applications. Developer Edition provides access to many of the features available with Enterprise Edition.

Salesforce.com does not provide technical support for Developer Edition. You can solicit help from the developer community message boards available to registered users via the Force.com developer website - developer.force.com. Documentation for Developer Edition is available from the Technical Library.

See Also:

Salesforce Edition Overview

Personal Edition

Note: Personal Edition isn't available to new organizations. Existing organizations that have already set up Personal Edition continue to have access. In addition, Personal Edition organizations that signed up after June 2009 don't have access to opportunities.

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

See Also:

Salesforce Edition Overview

Professional Edition

Salesforce Professional Edition is designed for businesses who need full-featured CRM functionality. Professional Edition includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small- to mid-sized deployment. For more information about Professional Edition features, visit the Salesforce Pricing & Editions page.

See Also:

Salesforce Edition Overview

Enterprise Edition

Salesforce Enterprise Edition is designed to meet the needs of large and complex businesses. In addition to all of the functionality available in Professional Edition, Enterprise Edition organizations get advanced customization and administration tools that can support large-scale deployments. Enterprise Edition also includes access to the Web services API so you can easily integrate with back-office systems. For more information about Enterprise Edition features, visit the Salesforce Pricing & Editions page.

See Also:

Salesforce Edition Overview

Unlimited Edition

Salesforce Unlimited Edition is salesforce.com's flagship solution for maximizing CRM success and extending that success across the entire enterprise through the Force.com platform. Unlimited Edition customers benefit from new levels of platform flexibility for managing and sharing all of their information on demand.

Unlimited Edition includes all Enterprise Edition functionality plus Premier Support, full mobile access, unlimited custom apps, increased storage limits, and more. For more information about Unlimited Edition features, visit the Salesforce Pricing & Editions page.

See Also:

Salesforce Edition Overview

Database.com Edition

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

As a Salesforce user, you're already using Database.com when you're performing tasks such as creating custom objects, managing security, or importing data with the Force.com platform and API.

A standalone version of Database.com is available for developers who want to create applications that leverage other languages, platforms, and devices.

See Also:

Salesforce Edition Overview

Salesforce Mobile Products Overview

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

Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
Chatter Mobile	Collaborate in Chatter from your mobile device without having to use a browser. You can monitor your feed, post updates and comments, and upload photos, files, and links. You can also email, call, or text people directly from their Chatter profiles. And the app gives you instant notifications to keep you up-to-date on important activities.	Free for customers using: • Group Edition • Professional Edition • Enterprise Edition • Unlimited Edition	• Android phones and tablets • Apple iPad • Apple iPhone • Apple iPod Touch • BlackBerry smartphones	No. However, Android and Apple devices retain a cached version of your feed. You can also access any data previously downloaded from the app.
Mobile Dashboards for iPad	Access your dashboards and their source reports from your iPad. You can see any dashboard you have access to, as well as view individual dashboard components, highlight their values, and drill into reports for each. You can also email a dashboard or component to others,	Free for customers using: • Enterprise Edition • Unlimited Edition • Developer Edition • Any organization with REST API enabled	• Apple iPad	Limited. Dashboards and reports that you access from the app are cached and available for offline viewing only.

Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
	and post and comment on dashboard Chatter feeds.			
Salesforce Classic	Access and update Salesforce data from your smartphone. You can view your dashboards, run simple reports, log calls and emails, keep track of your activities, and create, edit, and delete records. Most standard Sales objects and some Service objects are available. And if you're using the full version, custom objects and configurations are also supported.	A free, limited version is available for all Salesforce customers except for Database.com organizations Full version requires mobile licenses and is available for: • Professional Edition • Enterprise Edition • Unlimited Edition • Developer Edition	• Android phones and tablets • Apple iPhone • BlackBerry smartphones	Yes
Salesforce Touch	Access and update Salesforce data from an interface that's optimized for navigating and working on your touchscreen mobile device.	Free for customers using: • Contact Manager Edition • Group Edition	• Apple iPad • Apple iPhone	Limited. A Salesforce Touch pilot feature allows you to view your recently accessed records when

Product	Description	Supported Salesforce Editions	Supported Mobile Devices	Offline Support?
	You can view, edit, and create records, manage your activities, view your dashboards, and use Chatter. Salesforce Touch supports many standard Sales and Service objects and all of your organization's custom objects. And you can change between apps, just like in the full Salesforce site.	• Professional Edition • Enterprise Edition • Unlimited Edition • Developer Edition		your device isn't connected.

See Also:

Salesforce Classic Overview
Salesforce Touch Overview
Salesforce Edition Overview

SECURITY BASICS

Security FAQ

- How can I be sure my data is secure in Salesforce?
- How can I be sure my data won't be lost?
- How can I be assured my data will be kept private?
- Can I automatically back up my data in Salesforce?
- Does salesforce.com use my data for internal purposes?
- What happens when the system goes down?

How can I be sure my data is secure in Salesforce?

When you log in, the URLs used to access your data are all preceded with https:// instead of http://, which indicates that a secure connection has been established. Furthermore, whenever your password is changed or reset, or when you log in from a computer you have not used to access Salesforce before, you may have to activate your computer to successfully log in to Salesforce. Activating your computer allows Salesforce to verify your identity and prevent unauthorized access.

How can I be sure my data won't be lost?

We back up your data with a variety of methods to ensure that your organization does not experience any data loss. Every transaction is stored to RAID disks in real-time with archive mode enabled, allowing the database to recover all transactions prior to any system failure. Every night all data is backed up to a separate backup server and high speed automatic tape library. The backup tapes are cloned as an additional precautionary measure, and the cloned tapes are transported to an off-site, fireproof vault twice a month. In addition, the facility that stores our servers is architecturally designed to withstand catastrophic events and earthquakes up to 8.0 on the Richter scale.

How can I be assured my data will be kept private?

We are committed to keeping your data private and secure. For a greater understanding of the legal obligations salesforce.com adheres to regarding data privacy, refer to the Privacy Statement, as well as the Terms of Use agreement. You can view both items by clicking the relevant link below the copyright at the bottom of any page.

Can I automatically back up my data in Salesforce?

Yes, weekly export service provides you with `.csv` files of all objects and attachments within Salesforce. You can set up this service to automatically perform a data export each week.

Does salesforce.com use my data for internal purposes?

No. As outlined in the Privacy Statement, salesforce.com does not review, share, distribute, print, or reference your data except as provided in the salesforce.com Terms of Use, or as may be required by law. For exact information, refer to the Privacy Statement, as well as the Terms of Use agreement. You can view both items by clicking their links below the copyright at the bottom of any page.

What happens when the system goes down?

Salesforce.com builds redundancy into all systems to minimize system failures that could be perceived as customer outages. All components are proactively monitored and managed so faults are detected before system outages. While there may occasionally be system outages due to issues beyond our control, we employ numerous escalation procedures to notify the proper personnel in the event of a system outage, and remedy issues as quickly as possible.

UPDATES

Checking for Desktop Client Updates

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

User Permissions Needed	
To view client update alerts:	"On, updates w/alerts" OR "On, must update w/alerts" on your profile

Desktop clients such as Connect for Outlook and Connect Offline integrate Salesforce with your PC. Your administrator controls which desktop clients you are allowed to install.

If you have access to see Home tab alerts, and you've logged in to a client in the past, you'll see an alert banner on your Home tab when a new version of a client is available.

You can also see which clients are installed on your computer and check for updates on your own. Just follow these steps.

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
   - If you clicked **Setup**, select **Desktop Integration** > **Check for Updates**.
   - If you clicked **My Settings**, select **Desktop Add-Ons** > **Check for Updates**.
3. From the table, review the names and version numbers of available desktop clients.
4. If you are using Internet Explorer, click the correct desktop client and then click **Install Now** to install a client. If you are using another browser such as Mozilla Firefox, click **Download Now** to save the installer file to your computer. Then double-click the saved file to run the installer program.

   After you install the update, you'll continue to see the alert banner on your Home tab until you log in through the newly updated client.

See Also:

Viewing Messages and Alerts

GET STARTED IN SALESFORCE

Finding Your Personal Settings

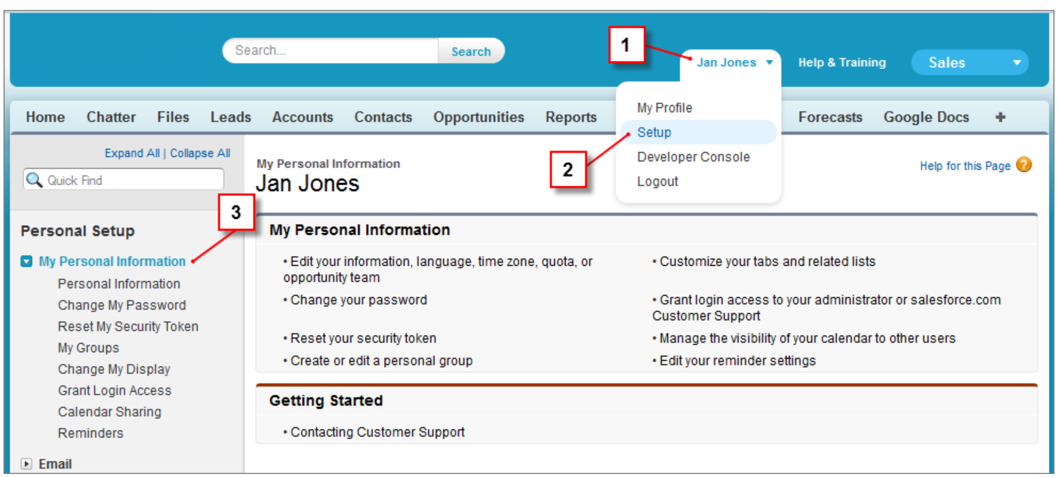
Salesforce includes personal settings options to help you personalize your experience. Depending on your organization, these settings are located in Personal Setup or My Settings.

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

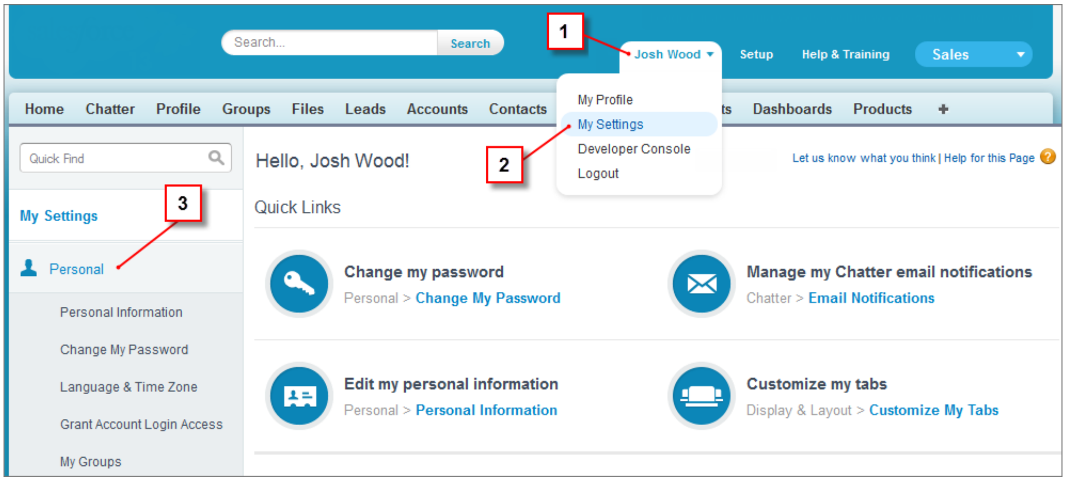
1. At the top of any Salesforce page, click the down arrow next to your name.

   Depending on your organization's user interface settings, you should see either **Setup** or **My Settings** in the menu.
2. From the menu under your name, click **Setup** or **My Settings**.
3. Do one of the following:

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



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



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

See Also:

Finding the Setup Menu

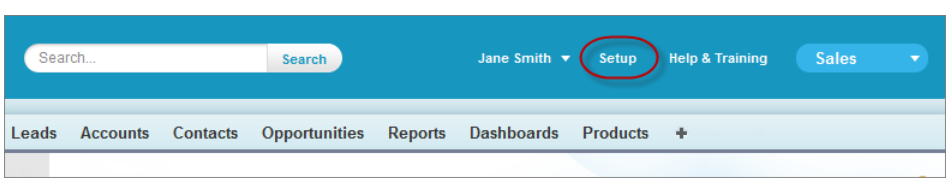
Finding the Setup Menu

Depending on your organization's user interface settings, you access the Setup menu from the drop-down menu under your name or from the user interface header.

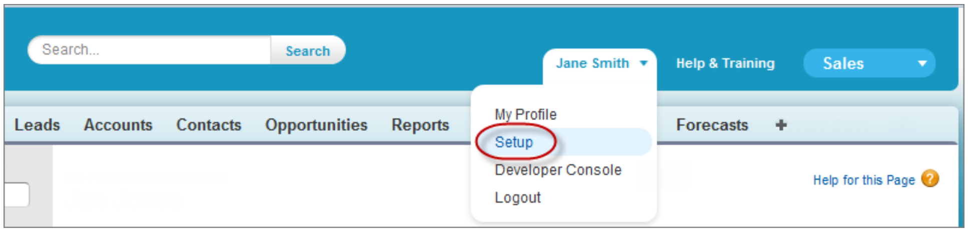
Available in: **All** editions except **Database.com**.

Salesforce includes many options for setting up, maintaining, and customizing your organization. Your organization may also have options for building, packaging, and distributing your own apps. These options are all available via the Setup menu. If you're a Salesforce administrator or developer, you'll use the Setup menu frequently. Your organization's user interface settings determine how everyone in your organization accesses this menu.

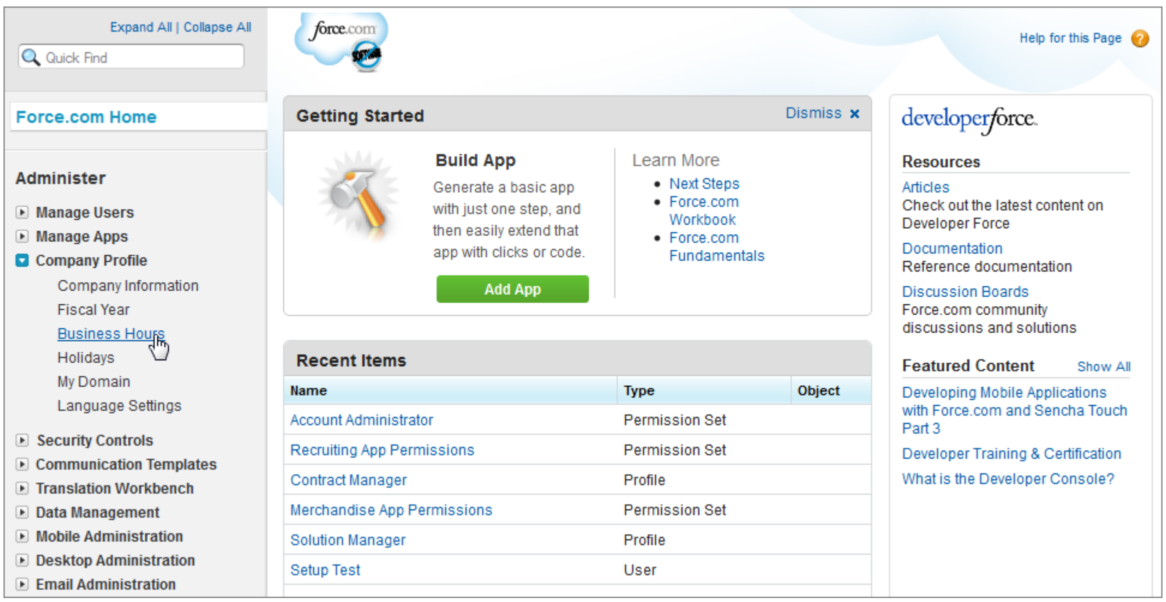
1. Look at the top of any Salesforce page.
   - If you see **Setup** in the user interface header, click it.



- If you don't see **Setup** in the header, click your name, then select **Setup**.



2. In the Setup menu that appears on the left side of the page, click ▶ next to a menu to expand it, then click the menu item you want.



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

See Also:

Finding Your Personal Settings

Understanding Your Administrator's Role

Salesforce administrators are users of Salesforce who have been assigned the System Administrator profile. All organizations have at least one administrator, but larger ones may have more.

Administrators have multiple duties, including setting up Salesforce for your organization and making sure it runs smoothly. They also add and configure users, and aid user productivity by creating custom tools, such as objects, workflows, validation rules, and reports. Your administrator's role can be as simple or as complex as your company's size and structure. In smaller organizations, the administrator might be someone who also uses Salesforce the way other users do: to sell products or provide customer service, for example.

There are many Salesforce features and items (such as those detailed in the *Learn Salesforce Basics* documentation) that you can modify yourself to suit your own needs. But in some cases, you might want to work with your administrator to help you get the most out of Salesforce. Here are a few examples.

- You need a custom workflow to find out when a case is closed.
- You need a custom approval process to sign off on employee expenses.
- You need help creating a custom report for your sales region.
- You need a user permission that's not granted as part of your user profile.
- You have questions about your own or others' access to records.
- You get an error message that tells you to contact your administrator for help or more information.

How you contact your administrator, and under what circumstances, depends on your company's internal business policies and practices.

See Also:

Granting Login Access

DEFINE PERSONAL INFORMATION AND PREFERENCES

Activating Your Computer

Password policies available in: **All** Editions

Watch a Demo (1:29 minutes)

You might have to activate your computer to successfully log in to Salesforce whenever your password is changed or reset, or when you log in from a computer you have not previously used to access Salesforce.

Computer activation allows Salesforce to verify your identity and prevent unauthorized access to the service.

1. When prompted on the login page, click **Email me a verification code**. Salesforce sends an activation email to the email address specified on your Salesforce Personal Information page.
2. When you receive the email, copy and paste the code into your browser.

   The code can be used for up to 24 hours from the time you requested the verification code. After 24 hours, the code expires, and you must repeat steps 1 and 2 to log in.

Editing Your Personal Information

The available personal setup options vary according to which Salesforce Edition you have.

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
   - If you clicked **Setup**, select **My Personal Information** > **Personal Information**.
   - If you clicked **My Settings**, select **Personal** > **Advanced User Details**.
3. To make changes, click **Edit**.

   If you change your email address, a confirmation message will be sent to the new address. You must click the link provided in that message for the new email address to take effect. This process ensures system security.
4. Click **Save**.

See Also:

Changing Your Password

Changing Your Password

Available in: **All** Editions

We recommend changing your password periodically to protect the privacy of your data. If your administrator specifies that user passwords expire on a periodic basis, you'll be prompted to change your password at the end of each period.

Note: If you have the "User Single Sign-On" permission, only an administrator can reset your password. Contact your administrator for assistance.

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
   - If you clicked **Setup**, select **My Personal Information** > **Change My Password**.
   - If you clicked **My Settings**, select **Personal** > **Change My Password**.
3. Enter the password information requested.

4. Click **Save**.

See Also:

Retrieving Forgotten Passwords
Resetting Your Security Token
Activating Your Computer

Editing Your Language and Locale Settings

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

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
   - If you clicked **Setup**, select **My Personal Information** > **Personal Information**, then click **Edit**.
   - If you clicked **My Settings**, select **Personal** > **Language & Time Zone**.
3. Specify these settings as needed:
   - For `Time Zone`, select your primary time zone.
   - For `Locale`, select your country or geographic region.
   - For `Language`, select your primary language. All text and online help appears in the language you select.
   - For `Email Encoding`, select the character set and encoding option for email that you send from Salesforce.
4. Click **Save**.

Editing Email Settings

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

To alter email settings that apply to all outbound emails you send from within the application:

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left side of the page, select **Email** > **My Email Settings**.
3. Make your changes.

Note: In Personal and Developer Editions, a Salesforce-specific tag line is added below your personal signature on all outbound emails.

Sharing Your Calendar

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

You can grant access to other users, personal and public groups, roles, or roles and subordinates to view your calendar.

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
   - If you clicked **Setup**, click **My Personal Information** > **Calendar Sharing**.
   - If you clicked **My Settings**, click **Calendars & Reminders** > **Calendar Sharing**.
3. Click **Add** to share your calendar with others.
4. Use the arrows to add or remove users, roles, or groups to your calendar.
5. Use the `Calendar Access` drop-down list to specify how you want to share your calendar. Select one of the following:

Option	Description
Hide Details	Others can see whether given times are available, but cannot see any other information about the nature of events in the calendar.
Hide Details and Add Events	Others can see whether given times are available, but cannot see details of events. Other users can insert events in the calendar.
Show Details	Others can see detailed information about events in the calendar.
Show Details and Add Events	Others can see detailed information about events in the calendar and can insert events in the calendar.
Full Access	Others can see detailed information about events in the calendar, insert events in the calendar, and edit existing events in the calendar.

6. Click **Save**.

The available `Calendar Access` options vary depending on the organization-wide calendar sharing level set by your administrator. Only choices that make your calendar access less restrictive are available. Calendar sharing settings affect the visibility of items on a calendar, but do not give access to event detail pages.

Note: Regardless of whether your organization's sharing settings specify using hierarchies, activities associated with a record are still visible to users above the activity's assignee in the role hierarchy.

Setting Record Type Preferences

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

Set an option to automatically insert your default record type when creating new records. Using this setting, you can bypass the page prompting you to select a record type. If you have several different record types available to you, you may prefer to be prompted to select a record type every time you create a new record.

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
   - If you clicked **Setup**, click **My Personal Information** > **Record Type Selection**.
   - If you clicked **My Settings**, click **Display & Layout** > **Set Default Record Types**.
3. Check any box to automatically select the default record type when creating records of that type.

   Any unchecked boxes indicate that you prefer to be prompted to select a record type.
4. Click **Save**.

Note: The Record Type Selection option may not be available because your organization is not using record types or multiple record types are not available for a particular tab.

Individual checkboxes are only offered when you have more than one record type available for a tab.

If your organization uses person accounts, note that checking the `Account` box on this page causes one default record type selection for all types of accounts. It is not possible to set separate default record type selections for business accounts and person accounts. If you work with both types of accounts, leave the box blank.

GET SET UP FOR THE WAY YOU WORK

BROWSERS

Supported Browsers

Browsers

Salesforce supports these browsers.

Browser	Comments
Microsoft® Internet Explorer® versions 7, 8, 9, and 10	If you use Internet Explorer, we recommend using the latest version. Apply all Microsoft software updates. Note these restrictions. • The Compatibility View feature in Internet Explorer isn't supported. • The Metro version of Internet Explorer 10 isn't supported. • Internet Explorer 7 and 8 aren't supported for the Developer Console. • Internet Explorer 10 isn't supported for the Service Cloud console. • Internet Explorer 7 isn't supported for Open CTI. • Internet Explorer 7 isn't supported for Salesforce CRM Call Center built with CTI Toolkit version 4.0 or higher. • Internet Explorer 7 isn't supported for Force.com Canvas. For configuration recommendations, see Configuring Internet Explorer on page 22.
Mozilla® Firefox®, most recent stable version	Salesforce.com makes every effort to test and support the most recent version of Firefox. For configuration recommendations, see Configuring Firefox on page 23.
Google Chrome™, most recent stable version	Google Chrome applies updates automatically; salesforce.com makes every effort to test and support the most recent version. There are no configuration recommendations for Chrome. Chrome isn't supported for the Console tab or the **Add Google Doc to Salesforce** browser button.
Google Chrome Frame™ plug-in for Microsoft® Internet Explorer® 6 and 7	Supported plug-in for Internet Explorer 6 and 7 only. Google Chrome Frame applies updates automatically; Salesforce supports only the most recent version. For configuration recommendations, see Installing the Google Chrome Frame™ Plug-In for Microsoft® Internet Explorer® on page 25. Chrome Frame plug-in isn't supported for the Service Cloud console or Forecasts.
Apple® Safari® versions 5.x and 6.x on Mac OS X	There are no configuration recommendations for Safari. Apple Safari on iOS isn't supported. • Safari isn't supported for the Service Cloud console. • Safari isn't supported for Salesforce CRM Call Center built with CTI Toolkit versions below 4.0.

Recommendations and Requirements for All Browsers

- For all browsers, you must enable JavaScript, cookies, and SSL 3.0.
- Salesforce.com recommends a minimum screen resolution of 1024 x 768 for the best possible user experience. Screen resolutions smaller than 1024 x 768 may not display Salesforce features such as Report Builder and Page Layout Editor properly.
- Some third-party Web browser plug-ins and extensions can interfere with the functionality of Chatter. If you experience malfunctions or inconsistent behavior with Chatter, disable all of the Web browser's plug-ins and extensions and try again.

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

- Internet Explorer is the only supported browser for:

- ◊ Standard mail merge (We don't support Google Chrome Frame™ plug-in for Internet Explorer because the ActiveX controls required for mail merge are supported in Internet Explorer only.)
- ◊ Installing Salesforce Classic on a Windows Mobile device
- ◊ Connect Offline

- Firefox is recommended for the enhanced page layout editor.
- Browser requirements also apply for uploading multiple files on Chatter.

Discontinued or Limited Browser Support

As of Summer '12, salesforce.com discontinued support for Microsoft® Internet Explorer® 6. Existing features that have previously worked in this browser may continue to work through 2014. Note these support restrictions.

- Internet Explorer 6 isn't supported for:
  - ◊ Chatter
  - ◊ Global search
  - ◊ Answers
  - ◊ Cloud Scheduler
  - ◊ The new user interface theme
  - ◊ Quote Template Editor
  - ◊ Service Cloud console
  - ◊ Salesforce Knowledge
  - ◊ Live Agent
  - ◊ Forecasts
  - ◊ Chatter Answers
  - ◊ Enhanced profile user interface
  - ◊ Site.com
  - ◊ Schema Builder
  - ◊ Joined reports
  - ◊ Enhanced dashboard charting options

Internet Explorer 7 isn't supported for Site.com and Chatter Messenger. For systems running Microsoft Windows XP, Internet Explorer versions 7 and 8 with the latest security patches are supported for Chatter Answers.

Configuring Internet Explorer

Available in: **All** Editions

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

To maximize the performance of Internet Explorer, set the following options in the Internet Options dialog box, which you can open by clicking **Tools** > **Internet Options**:

General Tab

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

Security Tab

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

Privacy Tab

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

Advanced Tab

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

- Do not select the `Do not save encrypted pages to disk` option.
- Select the `Use SSL 3.0` option.

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

See Also:

Supported Browsers

Configuring Firefox

Available in: **All** Editions

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

Required Settings
The following settings are required:

1. Click **Tools** > **Options**.
2. Enable JavaScript:
   a. Go to the Content panel.
   b. Select the **Enable JavaScript** option.
3. Accept cookies:
   a. Go to the Privacy panel.
   b. For the `Firefox will` option, select **Use custom settings for history**.
   c. Select the **Accept cookies from sites** option.
   d. Select the **Accept third-party cookies** option.
   e. For the `Keep until` option, select **they expire**.

4. Set encryption protocols:
   a. Go to the Advanced panel.
   b. Click the Encryption tab.
   c. Select the **Use SSL 3.0** option.
5. Click **OK**.

Advanced Settings

Optionally, configure advanced caching preferences to maximize performance:

1. Type `about:config` in the browser's location bar, and then press Enter.
2. If a warning displays, click **I'll be careful, I promise!**
3. Search for the following preferences and set them to the recommended value by double-clicking the preference name. Changes take effect immediately.
4. Change how the browser retains common resources across requests by setting the following caching preferences.

Preference	Recommended Value	Default Value
browser.cache.check_doc_frequency	3	3
browser.cache.disk.capacity	50,000 or more; increase to use more hard disk space	50,000
browser.cache.disk.enable	True	True
browser.cache.disk_cache_ssl	True	False
browser.cache.memory.enable	True	True
network.http.use-cache	True	True

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

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

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

Refer to MozillaZine Knowledge Base and Firefox Support Home Page for more information on these and other preferences.

See Also:

Supported Browsers

Installing the Google Chrome Frame™ Plug-In for Microsoft® Internet Explorer®

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

Salesforce supports Google Chrome Frame for Internet Explorer version 6 and 7. Google Chrome Frame enables Internet Explorer to utilize features such as the new user interface theme and Chatter.

1. In Internet Explorer, go to `www.google.com/chromeframe`.
2. Click **Get Google Chrome Frame** and review the Terms of Service.
3. Click **Accept and Install**.
4. After the installation is finished, click **Close** and restart Internet Explorer.

Note: Disabling Google Chrome Frame in Internet Explorer may result in display errors. Rather than disable Google Chrome Frame, it's recommended you uninstall it.

See Also:

Supported Browsers

Understanding Your Access to UI Elements, Records, and Fields

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

Your administrator can customize many different areas to secure your company's data. Additionally, users in Professional, Enterprise, Unlimited, and Developer edition organizations can control the access that other users have to their data by sharing records individually with colleagues.

To determine whether you can access data, review this table:

Action	Access Needed
To view a tab:	• You must have the "Read" permission on the records within that tab. • Make sure you have customized your personal display to show the tab.
To view a record:	• Make sure you have the "Read" permission on the type of record you want to view. • Professional, Enterprise, Unlimited, and Developer Edition organizations can set a sharing model that determines the

Action	Access Needed
	access users have to records they do not own. Depending on your sharing model, the owner may need to share the record with you if you are not the owner of the record or above the owner in the role hierarchy. • Enterprise, Unlimited, and Developer Edition organizations can use territory management to grant access to accounts, opportunities, and cases.
To view a field:	• Make sure you have the "Read" permission on the type of record for the field. • For Enterprise and Unlimited Edition organizations, check the field-level security; your field-level security settings may prevent you from seeing the field. • Check your page layout; depending on your page layout settings, you may see some fields and not others.
To edit a field:	• Make sure you have the "Edit" permission on the type of record for the field. • For Enterprise and Unlimited Edition organizations, check the field-level security; your field-level security settings may set a field to "Read-Only." • Check your page layout; page layouts can set fields to read only.
To view a related list:	• Make sure you have the "Read" permission on the type of records displayed in the related list. • Check your page layout; depending on your page layout settings, you may see some fields and not others.
To view a button or link:	• Make sure you have the necessary permission to perform the action. Buttons and links only display for users who have the appropriate user permissions to use them.

See Also:

Granting Access to Records
Viewing Which Users Have Access to Your Records
Record Access Levels

Customizing Your Display

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

You can customize your Salesforce display through your personal settings.

- Customize which tabs display in your app and in what order
- Customize what displays on your pages

Customizing Your Tabs

Specify which tabs display when you log in, or if you have multiple apps, which tabs display in each app.

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

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
   - If you clicked **Setup**, select **My Personal Information** > **Change My Display**, and click **Customize My Tabs**.
   - If you clicked **My Settings**, select **Display & Layout** > **Customize My Tabs**.
3. If you have access to multiple apps, select the app whose tabs you want to customize from the `Custom Apps` drop-down list.
   By default, you'll see the tabs for the selected custom app that are set for your profile.

   Note: The first tab that displays when you select an app may change if your administrator changes the app's default landing tab.

4. If desired, add each tab you want to display and change the display order of the tabs you've selected.
5. Click **Save**.

See Also:

Customizing Your Pages

Customizing Your Pages

Specify the related lists that appear in detail pages.

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

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. Do one of the following:
   - If you clicked **Setup**, from the left pane, select **My Personal Information** > **Change My Display**. Select an object from the drop-down list, and click **Customize My Pages**.
   - If you clicked **My Settings**, from the left pane, select **Display & Layout** > **Customize My Pages**. Select an object from the drop-down list, and click **Customize Page**.

   For your Home tab, select the dashboard snapshot to display on the Home tab. The link to customize your Home tab is available only if your administrator has customized your home page layout to include a dashboard.

   For all other tabs, specify which related lists display on your detail pages.

   - To add or remove related lists, select a related list and click the **Add** or **Remove** arrow.

     Note: This setting may change if your administrator changes the page layout for a particular tab.

   - To change the order of the related lists, select a related list title in the Selected List box, and click the **Up** or **Down** arrow.
3. Click **Save**.

See Also:

Customizing Your Tabs

Adding Tabs for Frequently Used Items

The Salesforce user interface is composed of tabs, which serve as starting points for viewing, adding, and editing information for an object. Different apps can have different sets of tabs. Add tabs for items you use frequently in any app.

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

1. Click the Plus icon (+) that appears to the right of your current tabs.
   The All Tabs page appears. By default, it shows all the tabs you have available to view or add.
2. If you want to see a list of just the tabs for a specific app, select that app from the `View` drop-down.
3. Click **Customize My Tabs**.
4. In the `Custom App` dropdown, select the app where you want the tab to appear.
   For example, if you want the Ideas tab to appear in your Marketing app, select `Marketing` and the Ideas tab will appear in that app only.
5. Use the **Add** and **Remove** arrows to move tabs from the Available Tabs list to the Selected Tabs list. Use the **Up** and **Down** arrows to change the order of the tabs.
6. Click **Save**.

7. If you added a tab to an app you're not actively using, open that app to see your new tab.

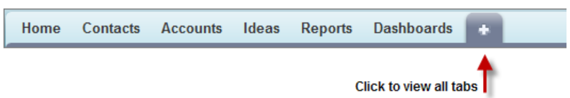
See Also:

Viewing Available Salesforce Tabs

Viewing Available Salesforce Tabs

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

To view all the tabs available to you in Salesforce, click the plus icon (+) next to the main tabs.



Using this page, you can:

- Click any of the tab names to quickly jump to that tab.
- If you have multiple apps, use the `View` drop-down list to see each app's logo and included tabs.
- Click **Customize My Tabs** to change how tabs display on your screen.

See Also:

Adding Tabs for Frequently Used Items

ACCESSIBILITY

Accessibility Overview

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

Salesforce.com is committed to providing high quality, on-demand enterprise applications that are accessible to all individuals, regardless of their abilities. To help meet this goal, Salesforce.com seeks to meet the requirements of the following accessibility standard and guideline: Section 508 and Web Content Accessibility Guidelines (WCAG) 2.0 Level A.

Salesforce on-demand applications incorporate a number of accessibility features that ensure all users have access and can use the applications. Many of the features are provided in Accessibility Mode, which can be enabled on an individual user basis. Accessibility Mode can provide a better user experience for users interacting by keyboard only or a screen reader. For more information, see Accessibility Recommendations for Specific User Groups on page 34 and Enabling Accessibility Mode on page 32.

Accessibility Testing at Salesforce

Salesforce uses Internet Explorer® 8 for general accessibility testing and in conjunction with JAWS 11 for screen reader testing. This means that Internet Explorer 8 and JAWS 11 are supported and recommended for use with the Salesforce on-demand applications for access to the accessibility enhancements. You might find that other browsers and screen readers also work well.

Salesforce and Accessibility

Salesforce supports the needs of users with different requirements. To achieve this, Salesforce provides two modes: Standard Mode and Accessibility Mode. For some user groups, Standard Mode works perfectly well. Other user groups may find that Accessibility Mode better suits their needs, particularly if they primarily use the keyboard to interact with Salesforce. See Accessibility Recommendations for Specific User Groups on page 34 for information about the mode that works best for you.

The following features or functionality in Salesforce may impact accessibility:

- Plug-ins, such as Flash Player and Adobe Reader, are required to access some content.
- JavaScript support must be available and turned on.
- After a specified period of inactivity, a session timeout popup window automatically displays, prompting you to log out or continue working. The time interval for this popup window is configurable by your administrator, or your administrator can disable the session timeout popup altogether. Contact your Salesforce administrator for information about your organization's settings. Your browser must allow pop-ups in Salesforce; otherwise you don't receive a warning about the upcoming timeout.
- On edit pages, the keyboard focus defaults to the first editable field on the page. When creating or editing a task or event, the keyboard focus defaults to the Subject field, regardless of its location on the page.
- Buttons, links, and fields that aren't currently active are labeled with a “disabled” attribute. For example, when using a wizard with multiple steps, some buttons may be disabled until you select a specific option.
- Dashboards contain charts and graphs that are visual in nature. To access the report data used to generate the chart or graph, simply select the dashboard component.

  Note: The underlying report may contain additional data than what is represented in the dashboard component. In addition, the underlying report may contain some data that you don't have access to view due to sharing settings.

- If the improved setup user interface is not enabled for your organization, most of the Personal Setup section of Setup is accessible. The exceptions are Chatter settings and creating HTML email templates. When creating email templates, we recommend you choose text email templates.

  If the improved setup user interface is enabled for your organization, personal settings pages under the My Settings menu are not evaluated for 508 compliance.
- Third-party content may not be accessible, such as rich text editor and spell-checker.
- Pilot and Beta features may not be accessible.
- Accessibility features haven’t been incorporated into Chatter or the Service Cloud console.

Keyboard Shortcuts

In addition to the standard keyboard shortcuts available with your Web browser, Salesforce supports the following keyboard shortcuts:

- Press ALT plus any number between 0 and 9 to highlight an item in the Recent Items list in the sidebar. For example, press ALT+1 to highlight the first item in the list, ALT+2 to highlight the second item, and so on. Note that pressing ALT+0 highlights the tenth item in the list.

Note: If you're using Mozilla Firefox, press SHIFT+ALT plus a number to automatically display the item you highlighted. If you're using Mozilla Firefox on a Mac, press CTRL plus a number. If you're using Internet Explorer, press ALT plus a number and then press Enter to display the highlighted item.

- If your organization has enabled the collapsible sidebar, press ALT+s to open or close the sidebar. Opening the sidebar using ALT+s automatically places your cursor in the Search box.
- In the enhanced page layout editor, you can use the following keyboard shortcuts:
  - Undo = CTRL+Z
  - Redo = CTRL+Y
  - Quick Save = CTRL+S

Required Plug-ins

The following Web plug-ins are required for viewing some content in Salesforce:

- **Adobe Reader**—For viewing various documentation PDF files. Go to the Adobe Reader download page to download a free copy.
- **Macromedia Flash Player**—For taking online training courses. Go to the Adobe Flash Player download page to download a free copy.

Areas Not Evaluated for 508 Compliance

The following areas of Salesforce have not been evaluated for compliance with Section 508:

- Setup pages to customize and administer a Salesforce organization
- Pages under the My Settings menu, if the improved setup user interface is enabled for your organization
- Connect for CTI
- Content Deliveries
- Salesforce CRM Content
- Connect for Lotus Notes
- Salesforce for Outlook
- Connect for Outlook
- Connect Offline
- Connect for Office
- Forecasts
- Salesforce Classic

Contacting Salesforce.com with 508 Accessibility Issues

Salesforce.com is committed to providing accessible documentation and support for all users. Documentation, customer support, and knowledge base access are available by selecting the **Help & Training** link at the top of any page.

To report any 508 accessibility issues or to request an alternate format of any document free of charge, contact accessibility@salesforce.com.

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

Enabling Accessibility Mode

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

Salesforce provides an alternate user interface mode that enables users with screen readers (such as JAWS or Window-Eyes) to use the application more effectively. The "accessibility mode" includes the full functionality of Salesforce with slight modifications to create a better user experience for users with some disabilities or impairments, particularly those who are blind.

To enable accessibility mode:

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
   - If you clicked **Setup**, select **My Personal Information** > **Personal Information**, then click **Edit**.
   - If you clicked **My Settings**, select **Display & Layout** > **Accessibility**.
3. Select the `Accessibility Mode` checkbox.
4. Click **Save**.

Areas Affected by Accessibility Mode

Some areas of Salesforce behave differently for users who have accessibility mode enabled.

- The following drop-down lists include a **Go** button that you must select to navigate to the option chosen in the drop-down list. With accessibility mode disabled, these drop-down lists automatically navigate to the chosen option when you select it.
  - ◊ Force.com app menu at the top of every page
  - ◊ Create New drop-down list in the sidebar of every page
  - ◊ Divisions drop-down list in the sidebar of every page (Available only if your organization uses divisions to segment data)
  - ◊ Drop-down list to change your My Tasks view on the Home tab
  - ◊ List view selector on every tab, including the activity list views available from the Home tab
  - ◊ Drop-down list to change your view of recent records on the home page of every tab
  - ◊ View drop-down list to show available tabs on the All Tabs page
  - ◊ Custom App drop-down list to view and customize the tabs in your apps (available via the **Customize My Tabs** page)
  - ◊ Folder selector for documents, dashboards, reports, and email templates
  - ◊ Drop-down list to change your view in the Recycle Bin
  - ◊ Forecast Summary drop-down list on the Forecast tab
  - ◊ Drop-down list to change your display of roles (available from Setup via **Manage Users** > **Roles**)
  - ◊ Drop-down list to change your display of territories (available from Setup via **Manage Territories** > **Hierarchy**)
  - ◊ Custom report wizard drop-down list to select the type of data for the report
  - ◊ Custom report wizard navigation drop-down list to move between steps of the wizard
  - ◊ Use Existing View drop-down list on the Add Members subtab of the Manage Members page, accessible via the Manage Members drop-down button on a campaign detail page

- When accessibility mode is enabled, click **Setup** to access the setup pages. When accessibility mode is disabled, depending on your user interface settings, click ***Your Name*** > **Setup**, or just click **Setup**.
- Inline Editing is disabled.
- Drag-and-drop editing on calendar views is disabled.
- Click-and-create events is disabled
- Drag-and-drop scheduling is disabled.
- Dashboard builder, the drag-and-drop editing interface for dashboards, is disabled.
- Report builder, the interactive interface for creating and editing reports, is disabled. Report builder is required to create or edit joined reports and reports containing cross filters or buckets. Users with accessibility mode enabled can run those reports, but can't create or edit them.
- Related list hover links are disabled.
- When viewing the calendar, the event detail overlays are disabled. With accessibility mode disabled, users can hover the mouse over an event in the calendar to view the event details in an overlay.
- Enhanced lists are disabled.
- Menu buttons are rendered as a drop-down list with a **Go** button.
- The HTML editor is disabled and replaced with a text box. This text box only accepts HTML and does not recognize plain text entries like carriage returns. To separate content, you must use paragraph or line break HTML tags.

  When accessibility mode is disabled, the HTML editor is available when posting an idea description or comment, asking a question or replying to a question, and using a rich text area (RTA) field.
- The HTML editor for HTML solutions is disabled.
- The **Check Spelling** button for solutions is disabled.
- Overlay pages are rendered in a different format, such as separate pop-up windows or as standard JavaScript dialogs. Overlay pages open on top of Salesforce pages and make Salesforce inactive until the overlay page is closed.
- When viewing a dashboard, the `View Dashboard` auto-complete filter is disabled and replaced by a standard drop-down list.
- Drag-and-drop to move reports and dashboards between folders is not available.
- In accessibility mode, you must use the report wizard to create reports. The report builder is not available.
- When finding similar opportunities, the Match Criteria sidebar on the search results page is disabled. The `Relevancy` column indicates how many fields the opportunity shares with your opportunity, followed by a list of the matching fields.
- The latest Manage Members page is disabled.
- The **Edit Columns** link on the Manage Members page, accessible via the Manage Members drop-down button on a campaign detail page, becomes a drop-down button. The Edit Columns overlay is replaced by a standard setup page.
- The **Recent Tags** drop-down list doesn't display when you add the tag component to the sidebar.
- When you ask a question in an answers community, a list of similar questions doesn't appear before you post the question. Users with accessibility mode enabled should use the search box on the Answers tab to see if their question has already been asked before they post their question.
- The **New Meeting Request** button on the Open Activities related list is hidden. As a result, you can't request a meeting in accessibility mode, and the Requested Meetings subtab in the Calendar section of the Home tab doesn't display any meetings
- Clicking a requested meeting in the Open Activities related list and in some list views doesn't open the meeting detail page. Instead, a dialog opens that instructs you to contact the meeting organizer for details about the requested meeting.
- The sidebar search doesn't display a list of your recent items when the sidebar search auto-complete feature is enabled.
- The **Turn My Email On** drop-down list on a Chatter group displays as a **Chatter Email Settings** link that opens your settings for receiving Chatter email.

See Also:

Accessibility Recommendations for Specific User Groups

Accessibility Recommendations for Specific User Groups

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

The accessibility recommendations provided in the following sections are based on the Enterprise Edition of Salesforce.com, but many of these recommendations apply to all other editions. The following information is designed to assist individuals with differing abilities to access the Salesforce.com.

We're constantly working on improving the accessibility of Salesforce.com. However, there may be areas of Salesforce.com that aren't currently accessible for a variety of reasons. These areas are identified for each user group and are expected to be corrected in future releases.

Specific accessibility issues are identified in our Voluntary Product Accessibility Template (a tool used to document a product's conformance with the accessibility standards under Section 508 of the Rehabilitation Act). Please contact your Salesforce.com customer support representative for a copy of this document.

Refer to the following sections for your user group:

- Sighted Keyboard Users on page 34
- Screen Reader Users (JAWS 11) on page 35
- Deaf or Hearing Impaired Users on page 37
- Specific Color Users on page 37
- Low Vision Users Who Need Magnification on page 38

See Also:

Enabling Accessibility Mode

Sighted Keyboard Users

Recommended Mode

Accessibility Mode enabled.

Features that rely on using the mouse in Standard Mode can be controlled by a keyboard in Accessibility Mode. In cases where parallel functionality isn't available in Accessibility Mode, a keyboard user is generally able to perform the same outcome using an alternate keyboard-accessible method.

Required Settings

Generally, Windows users don't need to turn on any settings to interact with Salesforce.com using a keyboard. Mac OS X users need to turn on full keyboard access under **System Preferences** > **Keyboard and Mouse** > **Keyboard Shortcuts**.

Salesforce.com Features That Enhance Accessibility

The following features are available in Salesforce.com. However, you may find certain areas of the user interface where these features are lacking. For example, some form controls are not in the correct place in a page’s tab order. These areas are expected to be corrected in future releases.

- In Standard Mode, information is displayed when you hover your mouse over specific parts of the user interface (like information icons). In Accessibility Mode, this information can be displayed by selecting the corresponding part of the user interface.
- A skip link is provided (first keyboard-focusable link on each page) to allow shifting of the focus to the start of the main content area. This generally bypasses the navigational menus before the main content area, greatly reducing the number of tab presses that would otherwise be required to reach the main content area of the page.
- Tab order is controlled with tabindex where the default order isn't logical.

Salesforce.com Features Not Optimized for Sighted Keyboard Users

The following functionality and features aren't fully accessible for sighted keyboard users, either due to their third-party ownership, lack of adequate current support for accessibility solutions, or limitations imposed by our development environments:

- A visual focus indicator hasn't been implemented.
- Some content is displayed in overlay boxes without implementing corresponding keyboard focus and order control. These are found in Chatter and training videos.
- Some of the rich interactive interfaces, such as drag-and-drop interfaces, aren't keyboard-accessible. These may have an alternative provided or may not be available in Accessibility Mode.

Helpful Resources and Tips

Keyboard shortcut resources:

- Windows XP (http://support.microsoft.com/kb/301583)
- Windows Vista (http://windows.microsoft.com/en-us/windows-vista/Keyboard-shortcuts)
- Windows 7 (http://windows.microsoft.com/en-US/Windows7/Keyboard-shortcuts)
- Adobe Reader 8 (http://help.adobe.com/en_US/Reader/8.0/help.html?content=WS58a04a822e3e50102bd615109794195ff-7aee.html)
- Adobe Reader 9 (http://help.adobe.com/en_US/Acrobat/9.0/Standard/WS58a04a822e3e50102bd615109794195ff-7aed.w.html)

Visual focus indicator tools:

- Firefox browser with Mozilla's Accessibar (http://accessibar.mozdev.org/)
- Ai Squared's ZoomText (http://www.aisquared.com/zoomtext)
- Opera browser (http://www.opera.com/)
- Create your own style sheet for use in Internet Explorer

Screen Reader Users (JAWS 11)

The currently supported screen reader is JAWS 11 in conjunction with Internet Explorer 8.

Recommended Mode

Accessibility Mode enabled.

Features that rely on using the mouse in Standard Mode can be controlled by a keyboard in Accessibility Mode. In cases where parallel functionality isn't available in Accessibility Mode, a keyboard user is generally able to perform the same outcome using an alternate keyboard-accessible method.

Required Settings

Salesforce.com recommends certain Personalized Web Settings for JAWS 11 screen readers. Personalized Web Settings apply to the domain or sub-domain of the site from where you make the changes, such as www.salesforce.com. JAWS saves these changes permanently and loads them each time you visit the specific site.

To modify the Personalized Web Settings in JAWS 11:

1. Open the JAWS Personalized Settings dialog (press SHIFT+INSERT+V) from the site you want to configure.
2. In the General Options section, configure the following settings:
   a. `Attributes Indicate` to Off. This setting ensures JAWS doesn't announce onclick and onmouseover attributes. These are used extensively in the default mode and are present but mostly inactive in Accessibility Mode.
   b. `Flash Movies Recognize` to On. Flash movies are used for some training videos.
   c. `Page Refresh` to Automatically.
   d. `Announce Live Region Updates` to On
3. In the Links Options section, set `Text Links Show Using` to Title. This setting ensures JAWS announces information provided through a link's title attribute, such as a warning that a new window will open.
4. In the Heading and Frame Options section, set `Headings Announce` to Heading and Level. Heading markup is used to provide context as well as navigation.
5. Select Close.

JAWS' default announcement of certain signs may be confusing in some contexts. Chatter uses the # (hash) sign for adding topics to posts and comments; and the @ (at) sign for mentioning people in posts and comments. By default JAWS announces these signs as "number" and "at" respectively. You may prefer to be have these announced in a different way by JAWS. This can be achieved by adding the sign and how JAWS should announce it to JAWS' dictionary. For example, you may add the "@" sign and specify the announcement as "at symbol" or you may specify that JAWS plays a particular sound when it encounters the @ sign. This would aid distinguishing between the @ sign and the word "at".

Salesforce.com Features That Enhance Accessibility

The following features are available in Salesforce.com. However, you may find certain areas of the user interface where these features are lacking.These areas are expected to be corrected in future releases.

- Content provided in overlays in Standard Mode is presented in new windows in Accessibility Mode. This ensures that keyboard interactivity doesn't stray outside of the content requiring the user's focus.
- Images are kept to a minimum.
- Important images have text alternatives equivalent to the purpose of the image; non-important images have empty text equivalents or are implemented via the CSS. Images conveying detailed information, such as graphs provided in the Dashboard, are also links to source data.
- Headings are marked up as headings. Headings help group content and are used instead of fieldset and legend elements for grouping form controls.
- The main heading for the page (typically at the start of the main content area) is a level 1 heading (and is usually the only level 1 heading in the page). This allows JAWS users to shift to this heading with the JAWS shortcut key.
- A skip link is provided (first keyboard-focusable link on each page) to allow shifting of the focus to the start of the main content area. This generally bypasses the navigational menus before the main content area, greatly reducing the number of tab presses that would otherwise be required to reach the main content area of the page.
- Data tables have data table markup to aid identification of headers for each cell.
- Lists provided in the main content area are marked up as lists.
- An asterisk (*) identifies required fields (announced as "star" by default in JAWS).

Salesforce.com Features Not Optimized for Screen Reader Users

The following functionality and features aren't fully accessible for screen reader users, either due to their third party ownership, lack of adequate current support for accessibility solutions, or limitations imposed by our development environments:

- Some of the rich interactive interfaces, such as drag and drop interfaces, are not accessible. These may have an alternative provided or may not be available in Accessibility Mode.
- PDF files have not been marked up for accessibility and do not have an alternative provided.
- Training videos don't provide audio description (including extended audio description).
- Some content is displayed in overlay boxes that aren't recognized as modal by screen readers, allowing the user to interact with other content without dismissing the overlay. These are found in Chatter and training videos.
- The session timeout warning may not provide sufficient time for a user response if a slow reading rate is used.

Accessibility features haven’t been incorporated into Chatter or the Service Cloud console.

Deaf or Hearing Impaired Users

Recommended Mode

Standard Mode

Required Settings

When viewing videos, you need to turn on captions by selecting the appropriate button.

Salesforce.com Features That Enhance Accessibility

The following features are available in Salesforce.com. However, you may find certain areas of the user interface where these features are lacking.These areas are expected to be corrected in future releases.

- Sounds alone are not used.
- Captions and/or text transcript are provided for videos.

Salesforce.com Features Not Optimized for Deaf or Hearing Impaired Users

Synchronized captions aren't provided for most training videos.

Specific Color Users

The currently supported browser is Internet Explorer 8 (compatibility mode turned off) in Windows.

Recommended Mode

The mode that is best for you likely depends on your ability to distinguish overlays from background content. We encourage you to try both Standard Mode and Accessibility Mode and then decide which mode works best for you.

Required Settings

Users who rely on settings within their browser and operating system to change the display to a particular color combination may need to display image text alternatives to access information provided by important images. This is because the browser and operating system settings don't change the colors displayed within images, and Salesforce.com implements many images as background images (which aren't displayed when browser and operating system settings for color display are in effect). In some cases, Salesforce.com displays overlapping text when image text alternatives are displayed.

To display image text alternatives in Internet Explorer 8:

1. Select **Tools** > **Internet Options** .
2. Select the Advanced tab.
3. Select "Always expand ALT text for images" (located under the Accessibility grouping).
4. Deselect "Show pictures" (located under the Multimedia grouping).
5. Select OK and refresh page.

Salesforce.com Features That Enhance Accessibility

The following features are available in Salesforce.com. However, you may find certain areas of the user interface where these features are lacking.These areas are expected to be corrected in future releases.

- Minimal use of images.
- Borders around most sections of content.
- An asterisk (*) identifies required fields.

Salesforce.com Features Not Optimized for Specifc Color Users

The following functionality and features are not fully accessible for specific color users, either due to their third party ownership, lack of adequate current support for accessibility solutions, or limitations imposed by our development environments:

- Important images may not be shown with alternate color schemes enabled through your browser and/or operating system settings. Refer to the previous instructions in this section on displaying image text alternatives.
- Video player controls don't display in alternate colors set through your browser and/or operating system settings.
- Some charts (for example, in reports and dashboards) rely on color to display information. If you have trouble interpreting the information in charts, navigate to your personal settings, edit your personal information, and select `Color-Blind Palette on Charts`. This option sets an alternate color palette for charts that has been optimized for use by color-blind users. For dashboard emails, the alternate palette is not used. You can also click a chart to view its source report.

Helpful Resources and Tips

- Third-party products, such as ZoomText, have the ability to alter colors shown in images as well as text.
- Consider using a Macintosh computer for high contrast support.
- Enabling settings that display image text alternatives can be helpful. However, this may result in some overlapping of the image text alternative and other text in the page.

Low Vision Users Who Need Magnification

Recommended Mode

The mode that is best for you likely depends on the degree of magnification that you require. We encourage you to try both Standard Mode and Accessibility Mode and then decide which mode works best for you.

Required Settings

Generally, screen magnifier users don't need specific settings in their browser or operating system. Browser-based users need to adjust their browser's zoom setting to suit their needs.

Salesforce.com Features That Enhance Accessibility

- Minimal use of images.
- Content and layout displays correctly up to at least 200%.

SETUP FAQS

View and Display FAQ

What languages does Salesforce support?

Salesforce.com offers three levels of language support: fully supported languages, end user languages, and platform-only languages. All languages are identified by a two-character language code (such as `en`) or a five-character *locale* code (such as en_AU).

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

Aside from the three levels of language support for Salesforce features, documentation, and application development tools, there are two ways you can actually localize your organizations. First, the 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 all of Salesforce in their language..

If your custom application uses a small number of Salesforce's standard tabs and fields, you can translate them by renaming tab and field labels.

Fully Supported Languages

You can change the language for all features, including Help, to one of the following fully supported languages from Setup by clicking **Company Profile** > **Company Information** > **Edit**.

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

- Dutch: `nl_NL`
- English: `en_US`
- Finnish: `fi`
- French: `fr`
- German: `de`
- Italian: `it`
- Japanese: `ja`
- Korean: `ko`
- Portuguese (Brazil): `pt_BR`
- Russian: `ru`
- Spanish: `es`
- Swedish: `sv`
- Thai: `th`*

  * Even though the Salesforce interface is fully translated to Thai, Help remains in English.

End User Languages

For end user languages, Salesforce provides translated labels for all standard objects and pages except Setup and Help. End user languages are useful if you have a multilingual organization or partners who speak languages other than your company's default language.

When you specify an end user language, labels and Help that are not translated fall back to English except for Spanish (Mexico), which falls back to Spanish.

- Arabic: `ar`
- Bulgarian: `bg`
- Czech: `cs`
- English (UK): `en_GB`
- Greek: `el`
- Spanish (Mexico): `es_MX`
- Hebrew: `iw`
- Hungarian: `hu`
- Indonesian: `in`
- Norwegian: `no`
- Polish: `pl`
- Romanian: `ro`
- Turkish: `tr`
- Ukrainian: `uk`
- Vietnamese: `vi`

Platform-Only Languages

Platform-only languages are used when you want to localize custom functionality (apps) that you've built on the Salesforce platform. When you choose a platform-only language, Salesforce provides translations for all of the custom objects and field labels in the chosen language.

Platform-only languages are available in all of the places you can select a language in the application, but selecting a platform-only language will default all labels in the application to English. All customizations made to Salesforce can be translated into a platform-only language, and renaming can be used to provide translations for standard field names on most objects. However, informative text and non-field label text is not translatable.

When you specify a platform-only language, labels for standard objects and fields fall back to English except: English (Australia), English (India), English (Malaysia), and English (Philippines) fall back to English (UK); French (Canada) falls back to French; Moldovan falls back to Romanian; and Portuguese (European) falls back to Portuguese (Brazil).

- Albanian: `sq`
- Armenian: `hy`
- Basque: `eu`
- Bosnian: `bs`
- Croatian: `hr`
- English (Australia): `en_AU`
- English (Canada): `en_CA`
- English (India): `en_IN`
- English (Malaysia): `en_MY`
- English (Philippines): `en_PH`
- Estonian: `et`
- French (Canada): `fr_CA`
- Georgian: `ka`
- Hindi: `hi`
- Icelandic: `is`
- Irish: `ga`
- Latvian: `lv`
- Lithuanian: `lt`
- Luxembourgish: `lb`
- Macedonian: `mk`
- Malay: `ms`
- Maltese: `mt`
- Moldovan: `ro_MD`
- Montenegrin: `sh_ME`
- Portuguese (European): `pt_PT`
- Romansh: `rm`
- Serbian (Cyrillic): `sr`
- Serbian (Latin): `sh`
- Slovak: `sk`
- Slovenian: `sl`
- Tagalog: `tl`
- Urdu: `ur`
- Welsh: `cy`

Why can't I see some buttons and links?

Buttons and links only display for users who have the appropriate permissions to use them. For example, users who do not have the “Delete” permission on opportunities do not see the **Delete** button on an opportunity detail page nor do they see the **Del** link on an opportunity related list.

Why can't I view Salesforce popup windows such as lookup dialogs and the Help & Training window?

If your browser's popup blocker settings are configured for maximum security, you won't be able to view any popup windows within Salesforce—even those that provide necessary functionality such as the calendar popup for choosing a date on an activity, lookup dialogs for selecting a record, the Help & Training window, and more.

To test your popup settings:

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
   - If you clicked **Setup**, select **My Personal Information** > **Reminders**.
   - If you clicked **My Settings**, select **Calendars & Reminders** > **Reminders**.
3. Click **Preview Reminder Alert**

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

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

Why did my data disappear when I pressed the Backspace key while editing a record?

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

Can I change or delete the drop-down list of entries that appears when I edit a text field?

No. These auto-complete entries that appear when you are editing certain text fields are a feature of Internet Explorer. The browser remembers text you have entered previously and provides a list of those entries for you to automatically complete the field. If you would like to turn this feature off, click **Tools** on your browser's menu bar, select **Internet Options**, click the **Content** tab, and then choose the **AutoComplete** button to change your browser's settings.

NAVIGATE SALESFORCE

Opening a Different Salesforce App

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

User Permissions Needed	
To use an app:	Access to that app as specified in your user profile or permission set.

If you need to use features available in a different Salesforce app than the one you have open, you need to open the other app. You can have one app open at a time, and the app you have open will open the next time you log on to Salesforce.

To open an app: In the upper-right corner of any Salesforce page, select the app you want from drop-down app menu.

Understanding Salesforce Pages

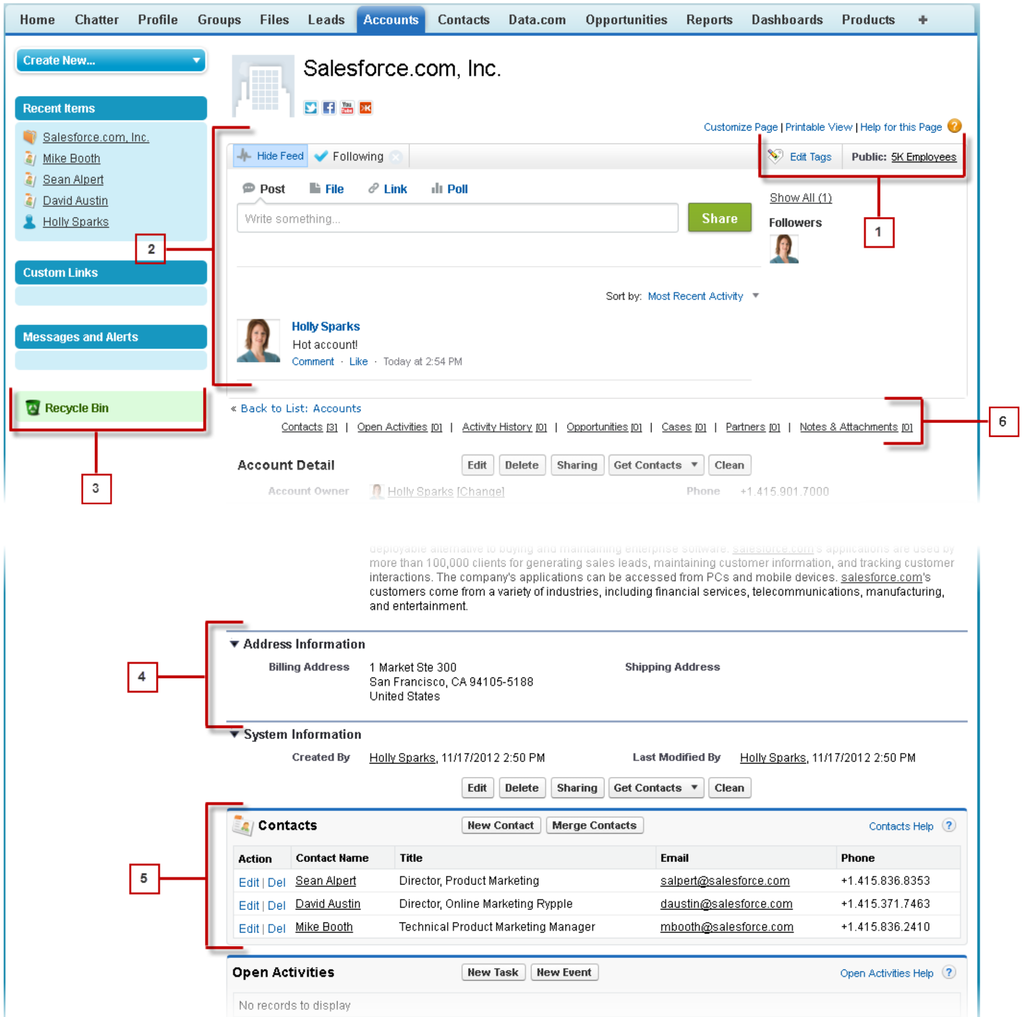
Salesforce apps are made up of tabs and pages. Objects and other items typically have tabs, and from an object's tab, you navigate through pages to interact with the features you're using. For example, if you want to create an account, you'll click the Accounts tab, and land on the Accounts Home page. Click **New** to open the Account Edit page where you'll enter information for the account. Click **Save**, and you'll see the account's Detail page. Return to the Accounts Home page and the new account is listed.

Salesforce tabs can have multiple of types of pages, including home, edit, and detail pages, and you can create list views for a lot of the objects you use. Chatter has one primary page type: a feed. And Data.com has a search interface. Dashboards and reports have their own page styles, as well.

Your system administrator typically sets up page layouts for standard objects, and enables the navigation features your organization can use, but interacting with Salesforce is easier if you understand the most common page elements for the most frequently used objects. They include:

1. A *tag* bar, where you can view and add tags for a record.
2. *feed*, where you can add and view comments about a record.
3. A *sidebar*, where you can do things like search and quickly create new records.
4. *Sections* for the record, with key fields and links.
5. *Related lists*, which group and display links to other records linked to the one you're viewing. You can change the order of related lists on your page.
6. Various *links* that help you move around the page or go to different pages or external sites.

Let's look at these elements on an account detail page.



See Also:

Tags Overview

Understanding the Salesforce Sidebar

Understanding the Salesforce Sidebar

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

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

- Search

  Use the header search box, if you don't have sidebar search.
- The Tags link and Recent Tags drop-down list
- The Divisions drop-down list
- The Create New drop-down list
- A Calendar shortcut to your last used calendar view
- The Recent Items list
- Messages and Alerts
- Custom Links
- A shortcut to the Recycle Bin

The options in your sidebar vary depending on the features you have enabled and whether your administrator has customized the page layout.

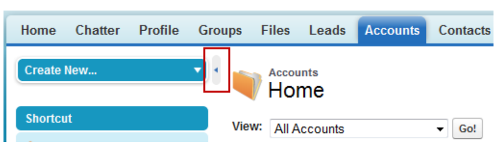
Showing and Hiding the Collapsible Sidebar

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

If your administrator has enabled the Collapsible Sidebar, you can show or hide the sidebar as needed.

Note: Call center users won't see incoming calls if they collapse the sidebar.

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



Opening Items You’ve Recently Viewed

Available in: **All** Editions

In the Recent Items section of the Salesforce Salesforce sidebar, you’ll find a list of up to 10 items (records, documents, custom objects, and the like) you’ve most recently added, edited, or viewed.

To open any item’s detail or edit page, just click its link.

Tip: If your organization has enabled hover details, you can hover your mouse over any item in the Recent Items list to view key information about the record before clicking into that record's detail or edit page.

Note: Your Recent Items may show fewer than 10 items if you have recently deleted any of your recently viewed items. Likewise, the Recent lists on the tab home pages (for example, the Recent Leads list) may show fewer than 10 or 25 items if you have recently deleted items.

Working with Enhanced Lists

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

User Permissions Needed	
To use inline editing in an enhanced list:	"Mass Edit from Lists"

Enhanced lists give you the ability to quickly view, customize, and edit list data to speed up your daily productivity. They must first be enabled by your administrator for you to take advantage of them.

Enhanced lists allow you to:

- Navigate through the list results by clicking the first page icon (<<), **Previous**, **Next**, or the last page icon (>>) at the bottom of the list.
- Jump to a specific page of results by entering a number in the text box in the lower right corner, and then pressing ENTER.
- Create a new view by clicking **Create New View**. Edit, delete or refresh the current view by clicking **Edit**, **Delete**, or , respectively.
- Change the number of records displayed per page. Click in the lower left corner of the list and select the desired setting. You can view 10, 25, 50, 100, or 200 records at a time. When you change this setting, you return to the first page of list results.

  Changing your preference for the number of records displayed per page applies to all lists in all Salesforce apps, not just the one currently displayed. In addition, if you change your preference to 200, a message warns you of possible performance degradation.
- Change the width of a column by dragging the right side of the column heading with your mouse. Any changes you make to column widths are specific to that list only, and are preserved when you next view the list.

  If you add or remove columns from a list, any column width customizations for that list are discarded automatically.
- Change the order in which a column is displayed by dragging the entire column heading with your mouse to the desired position. If you have permission to edit the list definition, your changes are automatically saved for all users who see the list. If you do not have permission to edit the list definition, your changes are discarded when you navigate away from the page.
- Change the number and order of columns displayed by clicking **Edit** next to the list drop-down in the upper left corner.
- If your administrator has enabled inline editing for your organization, edit single records directly from the list by double-clicking on individual field values. If your administrator has granted you the "Mass Edit from Lists" permission, you can also edit up to 200 records at a time.
- On account, contact, and lead list views, click the **Open Calendar** link at the bottom of the page to display a weekly view of a calendar underneath the list. Then, you can drag a record from the list to a time slot on the calendar to quickly create an event associated with the record. Note that your administrator controls the availability of the Drag-and-Drop Scheduling feature.

Navigating Long Lists

Available in: **All** Editions

Many list pages in Salesforce include the following tools for managing a large amount of data:

- To show a filtered list of items, select a predefined list from the `View` drop-down list, or click **Create New View** to define your own custom views.

  To edit or delete any view you created, select it from the `View` drop-down list and click **Edit**.
- At the top of a list, click a letter to show items that correspond to that letter, or click **Other** to show items whose names begin with numbers or symbols. Click **All** to display all items that match the criteria of the current view.
- To sort list view items by the data in a particular column, click that column's heading. This sorts text data alphabetically and numerical data in ascending order. Dates are sorted with the most recent date first. To reverse the sort order, click the column heading a second time.

  Note: You can sort by any custom field except multi-select picklists. User list views are not sorted for organizations with more than two million users. Organizations with more than 2 million users can contact salesforce.com to reenable sorting.

- Click the **Previous Page** or **Next Page** link to go to the previous or next set of items in the current view.
- At the bottom of a list, click the **fewer** or **more** link to decrease or increase the number of items per page.

In some related lists with many items, the following links are available:

- Click **Show [number] more** to increase the number of items in the list.
- Click **Go to list** to display a secondary page of the entire related list.

Changing Your Working Division

You can change which records you are viewing by selecting the division you are currently working in.

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

You can change the division you are working in at any time and override the default division you were originally assigned for some searches and reports.

- From the Divisions field in the sidebar, select the division you want to work in.

Note: Records you create are assigned to you default division, not to your working division. You can explicitly set a division other than your default division when you create the record.

See Also:

Using Divisions in Search and List Views

MANAGE YOUR WORK FROM THE HOME TAB

Home Tab Overview

The available tabs and options in the Create New drop-down list vary according to which permissions you have and which Salesforce edition you are using.

From the Home tab, you can:

- Create a Chatter post (if your organization uses Chatter)
- View dashboard snapshots
- View your tasks and calendar
- Search the feed ( )

You can also use the sidebar components, such as Create New, Recent Items, and Custom Links, that you'll also see on other Salesforce pages. Your Home page layout, sidebar components, and links are enabled and configured by your administrator.

Alert banners may appear on the Home tab to let you know when updates are available for desktop clients such as Connect for Outlook and Connect Offline.

Changing Your Home Tab Dashboard

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

Your administrator can create customized Home tab pages that display customized components such as a dashboard snapshot or your company logo. If your Home tab contains a dashboard snapshot, you can change the dashboard settings.

Click **Customize Page** in the Dashboard section of the Home tab if yours contains a dashboard. Use this page to select a different dashboard to display on the Home tab. Click **Refresh** to refresh the data in your dashboard.

Using Your Tasks and Calendar on the Home Page

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

Note: The My Tasks and Calendar sections display on the Home page if they are included as components on your Home page layout.

From the Home page, you can view, create, and edit tasks and events. If you have Salesforce for Outlook, Connect for Outlook or Connect for Lotus Notes installed, you may be able to sync your Outlook or Lotus Notes records with Salesforce so they appear in the My Tasks and Calendar sections.

In the My Tasks section, you can:

- Click **New** to create a task.
- View a list of tasks assigned to you. Up to fifteen tasks can be displayed; to view all your tasks, click **View More**.

  identifies tasks that are part of a recurring series.
- Choose a time frame from the drop-down list to change which tasks display.
- Assign unresolved emails to related records; to view all your unassigned emails, click **My Unresolved Items**.
- If your organization has enabled hover links for the My Tasks list, hover your mouse over the subject of a task to see the details of the task in an overlay. Alternatively, click the subject of a task to open the detail page of that task.
- Click **X** to close a task.

In the Calendar section, you can:

- Click **New Event** to create a new event.
- Click the Scheduled Meetings subtab to view a list of the events you have scheduled for the next seven days. This tab displays a maximum of 50 events per day.
  - ◊ identifies events that are part of a recurring series.
  - ◊ identifies events with invitees. Multi-person events aren't available in Personal Edition.
  - ◊ If your organization has enabled home page hover links for events, hover your mouse over the subject of an event to display the details of the event in an interactive overlay. Alternatively, click the subject of an event to open the detail page of that event.
- Click the Requested Meetings subtab to view meetings you have requested but not confirmed. This tab displays a maximum of 100 requested meetings.
  - ◊ Click the subject of the meeting to open its detail page where you can cancel and reschedule the meeting.
  - ◊ The Responses column shows the number of invitees that have responded to your meeting request.
  - ◊ Once you confirm a meeting, it appears on the Scheduled Meetings subtab.

  If the Requested Meetings subtab doesn't appear, ask your Salesforce administrator to add it to the Calendar section.
- View a small calendar of the current month. To change which month appears, click and .
- Navigate to different views of your calendar and click the icons underneath the small monthly calendar as appropriate.

Viewing Custom Links on the Home Tab

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

This section appears on the Home tab depending on your customized home page layout.

The Custom Links section of the Home tab contains links to websites or Salesforce pages that are useful for everyone in your organization. Your administrator sets which links appear in this section.

Viewing Messages and Alerts

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

The Messages and Alerts section of the Home tab sidebar displays announcements customized by your organization's administrator. The Messages and Alerts section is not available in Personal Edition.

See Also:

Checking for Desktop Client Updates

MANAGE RELATIONSHIPS AND DATA WITH RECORDS

VIEW AND SHARE RECORDS

Finding and Viewing Records and Data

Use tabs, search, or lists to look at your data.

Available in: All Editions

Your Salesforce data is stored in individual *records*. For example, if the Acme company is one of your accounts, you'll have an account record for Acme.

You can view your records different ways.

- Click a tab like Accounts or Contacts, select a view, and click **Go** to see a list of the records you are allowed to view. The results you see are called a *list view*.
- Search for a record using keywords, such as a name or address stored in the record. Use the search bar in the banner displayed on most pages.
- On many records, below the main page sections, look for related lists, which identify records that are associated with the record you're currently viewing. For example, an account record probably has a related list of contacts at that account.

See Also:

Understanding Salesforce Pages

Viewing and Editing Google Docs, Notes, and Attachments

Notes and attachments are available in: **Contact Manager**, **Group**, **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Google Docs available in all editions

You can create, view, and edit notes and add attachments from the Notes and Attachments related list on selected detail pages such as accounts, contacts, leads, opportunities, and products. You can also add attachments from the Attachments related list on selected detail pages such as cases, solutions, and campaigns.

If Chatter is enabled for your organization, files posted to a feed on a record are added to the record's Notes and Attachments related list as feed attachments. You can preview (if available), download, and delete feed attachments from the Notes and Attachments related list, but you can't edit them. You can view feed attachment details by clicking on the title of the file.

Note: If the Add Google Docs to Salesforce service is enabled in your organization, the Notes and Attachments related list is entitled Google Docs, Notes & Attachments, and the Attachments related list is entitled Google Docs & Attachments.

- To view the contents of a note, click the title of the note.
- To view the details of all notes, attachments, or Google docs, click **View All**.
- To view the details of an attachment, click the title of the file and then select the link on the Attached File detail page. To view the details of a feed attachment, click the title of the file.
- To edit a note or the title of an attachment, click **Edit** and make the changes you want. You can't edit the attached file directly and you can't edit feed attachments.
- To create a new Google doc, choose **New Document**, **New Spreadsheet**, or **New Presentation** from the **Add Google Doc** drop-down button.
- To associate an existing Google doc with the Salesforce record, choose **Add Existing** from the **Add Google Doc** drop-down button.
- To edit the title or URL of a Google doc, click **Edit**.
- To delete a Google doc from the related list, click **Del**. This action removes the document's association with the record but does not delete the document in Google Apps.
- To view and modify the Google doc, click **View**.

Consider the following when working with notes, attachments, and Google docs:

- To access a Google doc from a record detail page, the doc must be shared with your Google Apps account.
- When a file is attached to a record's Chatter feed it's added to the Notes and Attachments related list as a feed attachment. The file size limit for Chatter feed attachments is 2 GB.
- All notes and attachments added to contacts and opportunities roll up under the associated account as well.
- You cannot edit a note or attachment unless you also have access to edit the record associated with it.
- To delete a note or attachment, you must be the owner of the note or attachment or an administrator with the "Modify all Data" permission. Note ownership is determined by the owner field. Attachment ownership is determined by the created by field.
- Record owners (except Portal users) can delete attachments on records.

- Notes and attachments marked as private via the `Private` checkbox are accessible only to the person who attached them and administrators. For administrators to view private notes and attachments, they need the “View All Data” permission; to edit or delete them, they need the “Modify All Data” permission.
- The Notes and Attachments related list includes files from Salesforce CRM Content when they are posted to a Chatter feed on a record. However, the Notes and Attachments related list does not include Salesforce CRM Content files that only exist in Salesforce CRM Content. If your organization has Salesforce CRM Content enabled, you can add the Related Content related list to the detail pages for accounts, contacts, leads, opportunities, cases, products, or custom objects.
- Click **Preview** next to a feed attachment to display a preview of the file. Not all files can be previewed, such as copy-protected PDFs, unknown file types, and any file larger than 25 MB. For files that can’t be previewed, the **Preview** option isn’t available on feeds or list views, and files appear as generic file type icons in the feed. Some Microsoft Office 2007 features don't display correctly in previews.
- If Chatter is enabled for your organization, feed attachments are included in the Notes and Attachments related list. Portal users can download feed attachments, but can’t preview, edit, or delete them.

See Also:

Adding Notes to Records

Granting Access to Records

Sharing for accounts and contacts is available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions Sharing for campaigns, cases, custom object records, leads, and opportunities is available in **Enterprise**, **Unlimited**, and **Developer** Editions Sharing for custom objects is available in **Database.com**

Users can manually grant other users access to certain kinds of records, including accounts, contacts, and leads. In some cases, granting access to one record includes access to all its associated records. For example, if you grant another user access to an account, the user will automatically have access to all the opportunities and cases associated with that account.

To grant access to a record, you must be one of these.

- The record owner
- A user in a role above the owner in the hierarchy (if your organization’s sharing settings control access through hierarchies)
- Any user granted “Full Access” to the record
- An administrator

To grant access to a record:

1. Click **Sharing** on the record you want to share.
2. Click **Add**.
3. From the `Search` drop-down list, select the type of group, user, role, or territory to add.

   Depending on the data in your organization, your options can include:

Type	Description
Public Groups	All public groups defined by your administrator.
Personal Groups	All personal groups defined by the record owner. Only the record owner can share with his or her personal groups.
Users	All users in your organization. Does not include portal users.
Roles	All roles defined for your organization. This includes all of the users in each role.
Roles and Subordinates	All of the users in the role plus all of the users in roles below that role in the hierarchy. Only available when no portals are enabled for your organization.
Roles and Internal Subordinates	All roles defined for your organization. This includes all of the users in the specified role plus all of the users in roles below that role, excluding partner portal and Customer Portal roles.
Roles and Internal and Portal Subordinates	Adds a role and its subordinate roles. Includes all of the users in that role plus all of the users in roles below that role. Only available when a partner or Customer Portal is enabled for your organization. Includes portal roles and users.
Territories	For organizations that use territory management, all territories defined for your organization, including all users in each territory.
Territories and Subordinates	For organizations that use territory management, all users in the territory plus the users below that territory.

4. Choose the specific groups, users, roles, or territories who should have access by adding their names to the Share With list. Use the **Add** and **Remove** arrows to move the items from the Available list to the Share With list.
5. Choose the access level for the record you are sharing and any associated records that you own.

Note:

- If you're sharing an opportunity or case, those you share it with must also have at least "Read" access to the associated account (unless you are sharing a case via a case team). If you also have privileges to share the account itself, those you share it with are automatically given "Read" access to the account. If you do not have privileges to share the account, you must ask the account owner to give others "Read" access to it.
- `Contact Access` is not available when the organization-wide default for contacts is set to Controlled by Parent.
- For sharing rules that specify access for associated object records, the given access level applies to that sharing rule only. For example, if an account sharing rule specifies Private as the access level for associated contacts, a user may still have access to associated contacts via other means, such as organization-wide defaults, the "Modify All Data" or "View All Data" permission, or the "Modify All" or "View All" permission for contacts.

6. When sharing a forecast, select `Submit Allowed` to enable the user, group, or role to submit the forecast.
7. Select the reason you're sharing the record so users and administrators can understand.

8. Click **Save**.

Editing or Deleting Record Access

To edit the access levels for a record, click **Sharing** on the record, and then click **Edit** next to the group, user, role, or territory whose access you want to modify.

To delete the sharing access for a group, user, role, or territory, click **Sharing** on the record, and then click **Del** next to the group, user, role, or territory whose access you want to remove.

Manual shares are deleted automatically if the record owner is changed or if they are no longer needed, such as when the organization-wide defaults grant a similar or wider access than the manual share.

See Also:

Understanding Your Access to UI Elements, Records, and Fields
Viewing Which Users Have Access to Your Records
Record Access Levels

Viewing Which Users Have Access to Your Records

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

After you have granted access to a record you own, you can view a list of users who have access to the record and its related information and records, including their access level and an explanation. The list shows every user who has access that is greater than the organization-wide default settings.

For forecast sharing, the list shows whether the user can submit a forecast (in forecasting versions where sharing is available).High-volume portal users and Customer Portal super users are excluded from this list.

Note: For sharing rules that specify access for associated object records, the given access level applies to that sharing rule only. For example, if an account sharing rule specifies Private as the access level for associated contacts, a user may still have access to associated contacts via other means, such as organization-wide defaults, the “Modify All Data” or “View All Data” permission, or the “Modify All” or “View All” permission for contacts.

1. Click **Sharing** on the desired record.
2. Click **Expand List**.
3. Click **Why?** next to a user’s name to see the reason the user has access to the record.

   If there are multiple reasons with different access levels, the user is always granted the most permissive access level.

   The possible reasons are:

Reason	Description
Account Sharing Rule	The user has access via an account sharing rule created by the administrator.
Account Sharing	The user was granted access via the **Sharing** button on the associated account.

Reason	Description
Account Team	The user is a member of the account team.
Account Territory	The account has been assigned to a territory to which the user has access.
Account Territory Rule	The user has access via an account territory sharing rule created by the administrator.
Administrator	The user has the “Modify All Data” or “View All Data” administrative permission, or the “Modify All” or “View All” object permission.
Associated Portal User or Role	The portal user or any role above the portal user's role has access to the account for which the portal user is a contact.
Associated Record Owner or Sharing	The user owns or has sharing access to a contact or contract associated with the account. Click the link to view which associated records the user owns or has been given sharing access to.
Associated Record Sharing	The user is a member of a share group that has access to a contact or contract that's associated with the account owned by high-volume portal users.
Campaign Sharing Rule	The user has access via a campaign sharing rule created by the administrator.
Case Sharing Rule	The user has access via a case sharing rule created by the administrator.
Contact Sharing Rule	The user has access via a contact sharing rule created by the administrator.
Delegated Forecast Manager	A user has access to forecast data that was granted via the **Sharing** button on the forecast (in forecasting versions where sharing is available).
Forecast Manager	A user has access due to being a forecast manager in the forecast hierarchy.
Lead Sharing Rule	The user has access via a lead sharing rule created by the administrator.
Manager of Territory Member	The user has a subordinate in the role hierarchy who is assigned to the territory with which the account is associated.
Manual Sharing	The user has access that was granted via the **Sharing** button on the record.
Manual Territory Sharing	The account has been manually assigned to a territory to which the user has access.
Opportunity Sharing Rule	The user has access via an opportunity sharing rule created by the administrator.

Reason	Description
Owner	The user owns the record, or the user is a member of the queue that owns the record or above the queue member in the role hierarchy.
Portal Share Group	The user is a member of a share group that has access to records owned by high-volume portal users.
Related Portal User	The portal user is a contact on the case.
Role Above Owner or Shared User (Portal Only)	The user's role is above the role of a portal user who has access to the record via ownership or sharing.
Sales Team	The user is a member of the opportunity sales team.
View All Forecasts Permission	The user has the "View All Forecasts" permission.

See Also:

Understanding Your Access to UI Elements, Records, and Fields
Granting Access to Records

Record Access Levels

Sharing for accounts and contacts is available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Sharing for campaigns, cases, custom object records, leads, and opportunities is available in **Enterprise**, **Unlimited**, and **Developer** Editions

Sharing for custom objects is available in **Database.com**

When you share records with other users, you can assign them different levels of access to the records.

The available access levels are:

Access Level	Description
Full Access	User can view, edit, delete, and transfer the record. User can also extend sharing access to other users; however, the user cannot grant Full Access to other users.
Read/Write	User can view and edit the record, and add associated records, notes, and attachments to it.
Read Only	User can view the record, and add associated records to it. They cannot edit the record or add notes or attachments.

Access Level	Description
Private	User cannot access the record in any way.

See Also:

Understanding Your Access to UI Elements, Records, and Fields
Viewing Which Users Have Access to Your Records

Creating Custom List Views

Available in: **All** Editions

User Permissions Needed	
To create custom list views:	"Read" on the type of record included in the list
To create, edit, or delete public list views:	"Manage Public List Views"

You can create new list views to see a specific set of records such as contacts, documents, or campaigns. For example, create a list view of accounts in your state, leads with a specific `Lead Source`, or opportunities above a particular `Amount`. You can also create views of contacts, leads, users, or cases to use for mass email recipient lists.

To edit or delete any view you created, click **Edit** next to the View drop-down list. Administrators, and users with the "Manage Public List Views" permission, can also edit or delete public views and some of the standard Salesforce views. Users without the "Manage Public List Views" permission see the **Clone** link instead of **Edit** so they can clone a public or standard view.

To create a new view, click **Create New View** at the top of any list page or in the Views section of any tab home page.

1. Enter **View Name**

   Enter the name to appear in the View drop-down list.
2. If you have the "Customize Application" permission, enter a unique name to be used by the API and managed packages.
3. **Specify Filter Criteria**

   Filter by Owner

   These options vary depending on the kind of record. In general, select `All...` or `My...` to specify the set of records to search. There may be additional options:
   - Lead and case list views can be restricted by queue.
   - Price book list views can be restricted by price book.
   - Activity list views have several options.
   - If your organization has territory management, account and opportunity list views can be restricted by `My Territories` or `My Territory Teams`. `My Territories` means records associated with territories to which you belong. `My Territory Teams` means records associated with either territories to which you belong or territories below you in the territory hierarchy.
   - If your organization has case teams, case list views can be restricted by `My Case Teams`.

- If your organization has account teams, account list views can be restricted by `My Account Teams`.
- If your organization has opportunity teams, opportunity list views can be restricted by `My Opportunity Teams`.

Filter by Campaign

This option is available on these list views:

- Contacts home
- Leads home
- Mass email contacts
- Mass email leads
- Mass add campaign members wizard
- Mass update campaign members wizard

If you are editing a list view that is filtered by campaign, and do not have at least read access to the campaign, you will receive an error when attempting to save the list view.

Filter by Division

If your organization uses divisions to segment data and you have the "Affected by Divisions" permission, select the division that records in the list view must match. This option is disabled if you are not searching all records.

Select --Current-- to show records in your current working division.

Filter by Additional Fields

Optionally, enter filter criteria to specify conditions that the selected items must match, for example, `Lead Source equals Web`. You can also use special date values in your filter criteria.

Note: When you select the `Created Date` field in a list view filter, the value you specify can only be a date and not a time. This restriction does not apply to other filters.

4. **Select Fields to Display**

The default fields are automatically selected. You can choose up to 15 different fields to display in your view. You can display only the fields that are available in your page layout. When you select a long text area field, up to 255 characters are displayed in the list view.

a. To add or remove fields, select a field name, and click the **Add** or **Remove** arrow.
b. Use the arrows to arrange the fields in the proper sequence.

5. **Restrict Visibility**

If you are an administrator or a user with the "Manage Public List Views" permission, specify whether everyone or just you can see the custom view. This option is not available in Personal Edition. To see a list view, users must also have the appropriate "Read" permission on the type of records within the list view.

Alternatively, Enterprise, Unlimited, and Developer Edition users can specify a public group, role, or role including all users below that role to see the custom view. To share the list view, select `Visible to certain groups of users`, choose the type of group or role from the drop-down list, select the group or role from the list below it, and click **Add**.

Note: List views are visible to your customers in the Salesforce Customer Portal if the `Visible to all users` radio button is selected for views on objects assigned to Customer Portal users' profiles. To create list views that only your Salesforce users can see, select `Visible to certain groups of users`, and then share it with the All Internal Users group or a selected set of internal groups and roles.

When implementing a Customer Portal, create custom views that contain only relevant information for Customer Portal users, and then make those views visible to Customer Portal users by sharing them with the All Customer Portal Users group or a selected set of portal groups and roles.

6. Click **Save**. The view appears in the View drop-down list so you can access it later.

   You can rename an existing list view and click **Save As** to save the criteria of the list view without altering the original view.

To navigate back to the last list page you viewed, click **Back to list** at the top of any detail page.

Note: The information you see in list views is only the data to which you have access—either records you own or have read or read/write access to, records that have been shared to you, or records owned by or shared with users in roles below you in the role hierarchy.

In addition, you can view only those fields that are visible in your page layout and field-level security settings. Archived activities are not included in activity list views. You can use the Activity History related list to view these activities.

Sorting List Views

Available in: **All** Editions

User Permissions Needed	
To sort a list view:	"Read" on the records in the list

Lots of objects let you view related records in lists, also called "list views". If your list is long, or you want to print it, you might want to sort the records by one of the field columns. For example, the All Accounts list view can be sorted by the `Account Name` field column, `Billing State/Province` field column, and others. Custom list views can be sorted by their own field columns. Sorting is alphanumeric.

1. Open the list view.
2. Click the header for the field column you want to sort by.
   An arrow appears, to tell you how the list is sorted: from the column's first record) (alphanumerically) or its last ().

Note: Starting in Spring '13, list views for the Users object in organizations that have more than two million users cannot be sorted.

See Also:

Creating Custom List Views

Printing List Views

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

User Permissions Needed	
To print list views:	"Read" on the records included in the list

If printable list views are enabled for your organization, you can print standard list views and custom list views.

1. Go to the list view you want to print. For example: All Accounts on the Accounts tab.
2. Sort the contents of the list view if you want to.
3. Click .
4. In the new window, select the number of records you want to print—up to 1,000. (To print more than 1,000 records, run a report and then click **Printable View** on the report.)
5. Click **Print This Page**.

Deleting List Views

Available in: **All** Editions

To delete one of your custom views, select the view from the drop-down list and click the **Edit** link. At the top of the page, click the **Delete** button.

See Also:

Creating Custom List Views

Understanding Relative Date Values for Filter Criteria

When you create a list view that includes a filter for a range of dates, such as `Create Date` or `Last Update Date`, use one or more of the relative date values provided to specify the range.

Available in: **All** Editions

For example, to create a custom view or report of accounts created the previous week, enter "Create Date equals LAST WEEK." For relative date values with variables (such as "NEXT *N* DAYS"), substitute *N* with any number greater than zero.

Relative date values are not case-sensitive. You can use "LAST WEEK" or "last week."

You can use multiple range values in a single field, separated by commas.

Note: For Enterprise, Unlimited, Professional, and Developer Editions, the week is defined by the `Locale` drop-down list on your personal information page. For Contact Manager, Group, and Personal Editions, the week is defined by the `Locale` setting in the company profile . For example, when the `Locale` is US English, a week runs Sunday to Saturday, whereas with UK English, a week spans Monday to Sunday.

Relative Date Value	Range
YESTERDAY	Starts at 12:00:00 a.m. on the day before the current day and continues for 24 hours.
TODAY	Starts at 12:00:00 a.m. on the current day and continues for 24 hours.
TOMORROW	Starts at 12:00:00 a.m. on the day after the current day and continues for 24 hours.
LAST WEEK	Starts at 12:00:00 a.m. on the first day of the week before the current week and continues for seven days.
THIS WEEK	Starts at 12:00:00 a.m. on the first day of the current week and continues for seven days.
NEXT WEEK	Starts at 12:00:00 a.m. on the first day of the week after the current week and continues for seven days.
LAST *n* WEEKS	Starts at 12:00:00 a.m. on the first day of the week that started n weeks before the current week, and continues up to the current second.
NEXT *n* WEEKS	Starts at 12:00:00 a.m. on the first day of the week after the current week and continues for *n* times seven days.
n WEEKS AGO	Starts at 12:00:00 a.m. on the first day of the week that started *n* weeks before the start of the current week and continues for seven days.
LAST MONTH	Starts at 12:00:00 a.m. on the first day of the month before the current month and continues for all the days of that month.
THIS MONTH	Starts at 12:00:00 a.m. on the first day of the current month and continues for all the days of that month.
NEXT *n* MONTHS	Starts at 12:00:00 a.m. on the first day of the month after the current month and continues until the end of the *n*th month.
LAST *n* MONTHS	Starts at 12:00:00 a.m. on the first day of the month that started *n* months before the current month and continues up to the current second.
n MONTHS AGO	Starts at 12:00:00 a.m. on the first day of the month that started *n* months before the start of the current month and continues for all the days of that month.
NEXT MONTH	Starts at 12:00:00 a.m. on the first day of the month after the current month and continues for all the days of that month.
LAST 90 DAYS	Starts at 12:00:00 a.m. 90 days before the current day and continues up to the current second. (The range includes today.)
NEXT 90 DAYS	Starts at 12:00:00 a.m. on the day after the current day and continues for 90 days. (The range does not include today.)
LAST *n* DAYS	Starts at 12:00:00 a.m. *n* days before the current day and continues up to the current second. (The range includes today.)

Relative Date Value	Range
NEXT *n* DAYS	Starts at 12:00:00 a.m. on the next day and continues for the next *n* days. (The range does not include today.)
n DAYS AGO	Starts at 12:00:00 a.m. on the day *n* days before the current day and continues for 24 hours. (The range does not include today.)
LAST QUARTER	Starts at 12:00:00 a.m. on the first day of the calendar quarter before the current calendar quarter and continues to the end of that quarter.
THIS QUARTER	Starts at 12:00:00 a.m. on the first day of the current calendar quarter and continues to the end of the quarter.
NEXT QUARTER	Starts at 12:00:00 a.m. on the first day of the calendar quarter after the current calendar quarter and continues to the end of that quarter.
LAST *n* QUARTERS	Starts at 12:00:00 a.m. on the first day of the calendar quarter *n* quarters ago and continues to the end of the calendar quarter before the current quarter. (The range does not include the current quarter.)
NEXT *n* QUARTERS	Starts at 12:00:00 a.m. on the first day of the calendar quarter after the current quarter and continues to the end of the calendar quarter *n* quarters in the future. (The range does not include the current quarter.)
n QUARTERS AGO	Starts at 12:00:00 a.m. on the first day of the calendar quarter *n* quarters before the current calendar quarter and continues to the end of that quarter.
LAST YEAR	Starts at 12:00:00 a.m. on January 1 of the year before the current year and continues through the end of December 31 of that year.
THIS YEAR	Starts at 12:00:00 a.m. on January 1 of the current year and continues through the end of December 31 of the current year.
NEXT YEAR	Starts at 12:00:00 a.m. on January 1 of the year after the current year and continues through the end of December 31 of that year.
n YEARS AGO	Starts at 12:00:00 a.m. on January 1 of the calendar year *n* years before the current calendar year and continues through the end of December 31 of that year.
LAST *n* YEARS	Starts at 12:00:00 am on January 1, *n+1* years ago. The range ends on December 31 of the year before the current year.
NEXT *n* YEARS	Starts at 12:00:00 a.m. on January 1 of the year after the current year and continues through the end of December 31 of the *n*th year.
LAST FISCAL QUARTER	Starts at 12:00:00 a.m. on the first day of the fiscal quarter before the current fiscal quarter and continues through the last day of that fiscal quarter. The fiscal quarter is defined in Setup at **Company Profile** > **Fiscal Year**. **Note:** None of the FISCAL literal date values are supported when creating mobile custom views.
THIS FISCAL QUARTER	Starts at 12:00:00 a.m. on the first day of the current fiscal quarter and continues through the end of the last day of the current fiscal quarter. The fiscal quarter is defined in Setup at **Company Profile** > **Fiscal Year**.

Relative Date Value	Range
NEXT FISCAL QUARTER	Starts at 12:00:00 a.m. on the first day of the fiscal quarter after the current fiscal quarter and continues through the last day of that fiscal quarter. (The range does not include the current quarter.) The fiscal quarter is defined in Setup at **Company Profile** > **Fiscal Year**.
LAST *n* FISCAL QUARTERS	Starts at 12:00:00 a.m. on the first day of the fiscal quarter *n* fiscal quarters ago and continues through the end of the last day of the previous fiscal quarter. (The range does not include the current fiscal quarter.) The fiscal quarter is defined in Setup at **Company Profile** > **Fiscal Year**.
NEXT *n* FISCAL QUARTERS	Starts at 12:00:00 a.m. on the first day of the fiscal quarter after the current fiscal quarter and continues through the end of the last day of the *n*th fiscal quarter. (The range does not include the current fiscal quarter.) The fiscal quarter is defined in Setup at **Company Profile** > **Fiscal Year**.
n FISCAL QUARTERS AGO	Starts at 12:00:00 a.m. on the first day of the fiscal quarter *n* fiscal quarters before the current fiscal quarter and continues through the end of the last day of that fiscal quarter.
LAST FISCAL YEAR	Starts at 12:00:00 a.m. on the first day of the fiscal year before the current fiscal year and continues through the end of the last day of that fiscal year. The fiscal year is defined in Setup at **Company Profile** > **Fiscal Year**.
THIS FISCAL YEAR	Starts at 12:00:00 a.m. on the first day of the current fiscal year and continues through the end of the last day of the fiscal year. The fiscal year is defined in Setup at **Company Profile** > **Fiscal Year**.
NEXT FISCAL YEAR	Starts at 12:00:00 a.m. on the first day of the fiscal year after the current fiscal year and continues through the end of the last day of that fiscal year. The fiscal year is defined in Setup at **Company Profile** > **Fiscal Year**.
LAST *n* FISCAL YEARS	Starts at 12:00:00 a.m. on the first day of the fiscal year *n* fiscal years ago and continues through the end of the last day of the fiscal year before the current fiscal year. (The range does not include the current fiscal year.) The fiscal year is defined in Setup at **Company Profile** > **Fiscal Year**.
NEXT *n* FISCAL YEARS	Starts at 12:00:00 a.m. on the first day of the fiscal year after the current fiscal year and continues through the end of the last day of the *n*th fiscal year. (The range does not include the current fiscal year.) The fiscal year is defined in Setup at **Company Profile** > **Fiscal Year**.
n FISCAL YEARS AGO	Starts at 12:00:00 a.m. on the first day of the fiscal year *n* fiscal years ago and continues through the end of the last day of that fiscal year.

View and Share FAQ

How does the sharing model work?

In Professional, Enterprise, Unlimited, and Developer Edition organizations, the administrator can define the default sharing model for your organization by setting organization-wide defaults. Organization-wide defaults specify the default level of access to records. For most objects, organization-wide defaults can be set to Private, Public Read Only, or Public Read/Write.

In environments where the sharing model for an object has been set to Private or Public Read Only, an administrator can grant users additional access to records by setting up a role hierarchy and defining sharing rules. Role hierarchies and sharing rules can only be used to grant additional access—they cannot be used to restrict access to records beyond what was originally specified with the sharing model through organization-wide defaults.

After restricting access using organization-wide defaults, users typically get access through one or more of these methods:

- Role hierarchy
- Sharing rules
- Manual sharing
- Implicit access (Accounts and associated child records)
- Teams (Account, Case, and Opportunity)

Which kinds of records can I print list views for?

If printable list views are enabled for your organization, you can print standard and custom list views for these kinds of records.

- Accounts
- Activities
- Campaigns
- Cases
- Contacts
- Contracts
- Custom objects
- Documents
- Leads
- Opportunities
- Permission sets
- Price books
- Profiles
- Products
- Reports
- Solutions

CREATE RECORDS

Creating Records

Available in: **All** Editions

Creating records is standard procedure for most Salesforce users. While some objects (such as Account) have special *guidelines and considerations* you need to be aware of, the *process* of creating a record is similar for all.

Depending on how your administrator has set up your Salesforce organization, you can create records in a few different ways.

- From object tabs
- In feeds on the home page, Chatter tab, and record detail pages
- With the Create New drop-down list in the sidebar
- With Quick Create

See Also:

Editing Records
Deleting Records
Guidelines for Entering Currency, Dates, Times, and Phone Numbers
Adding Notes to Records
Attaching Files to Records

Creating Records from Object Tabs

Available in: **All** Editions

User Permissions Needed	
To create records:	"Create" on the object for the kind of record you're creating

Before you create a record, make sure you're aware of any guidelines for the kind of record you're creating.

1. Click the tab for the kind of record you want to create. You'll start from that object's Home page. For example, click the Accounts tab if you want to create an account record.
2. Click **New**.
3. Select a record type if you're prompted to.
4. Enter values in the fields. Required fields are identified with a red bar (|).

Tip: Most objects have field definitions in the Salesforce help. Just search the help for the object name + "fields". For example, if you're creating or editing an account record and want to know more about your options in the `Industry` drop-down list, look up "Account Fields" in the help.

5. When you finish entering values for your new record, click **Save**, or click **Save & New** to save the current record and create another. If you navigate away from the page before clicking **Save**, you may lose your changes.

See Also:

Creating Records in Feeds
Creating Records with Quick Create
Creating Records

Creating Records in Feeds

Available in: **All** Editions

User Permissions Needed	
To create records:	"Create" on the object for the kind of record you're creating

Depending on how your administrator has set up Salesforce, you may be able to create records in the feed on the home page, the Chatter tab, and record detail pages. Publishers on different feeds may have different actions available; check with your administrator for information on what you can do in each feed. Before you create a record, make sure you're aware of any guidelines for the kind of record you're creating.

1. In the feed in which you want to create a record, click the publisher action that corresponds to the kind of record you want to create.
2. Enter values in the fields. Required fields are identified with a red bar (|).
   Most objects have field definitions in the Salesforce help. Just search the help for the object name + "fields". For example, if you're creating or editing an account record and want to know more about your options in the `Industry` drop-down list, look up "Account Fields" in the help.
3. When you finish entering values for your new record, click **Create**.

A feed item for the record you've created appears:

- In the feed in which you created the record.
- As the first item in the feed for the new record itself.
- In your Chatter feed.

- In the Chatter feed of anyone who follows the record from which you created the new record. For example, if you create a contact from the record detail page for the account ABC Industries, anyone who follows ABC Industries will see a feed item for the contact record you created.

See Also:

Creating Records from Object Tabs
Creating Records with Quick Create
Creating Records

Creating Records Using the Create New Drop-Down List

The available options in the Create New drop-down list vary according to which permissions you have, which Salesforce Edition you are using, and which app you are using.

The Create New drop-down list, available in the sidebar, provides options to create new records. To create a new record using the drop-down list:

1. Select the type of record you want to create. The new record page immediately displays in the appropriate tab or the Upload a File dialog box displays if you selected **File**.
2. Fill in the fields.
3. Click **Save** or **Upload to My Files** if you selected **File**.

Creating Records with Quick Create

Available in: **All** Editions

User Permissions Needed	
To create records:	"Create" on the object for the kind of record you're creating

If your administrator has enabled Quick Create, you can create records from the home pages for leads, accounts, contacts, and opportunities. You can also create accounts from the Account lookup field results list on the Quick Create form on contacts, leads, and opportunities. Validation rules don't apply when you create new records with Quick Create.

1. Click the tab for the kind of record you want to create. To create an account while you create a contact, lead or opportunity, click the icon next to the Account field in the Quick Create form you're using.
2. Enter values in the fields. Required fields are identified with a red bar (|).
   Most objects have field definitions in the Salesforce help. Just search the help for the object name + "fields". For example, if you're creating or editing an account record and want to know more about your options in the `Industry` drop-down list, look up "Account Fields" in the help.

3. Click **Save**.

See Also:

Creating Records from Object Tabs
Creating Records in Feeds
Creating Records

Selecting Picklist Values

In Salesforce, you may encounter a few different types of picklist fields.

- Standard picklists - Click the down arrow to select a single value.
- Multi-select picklists - Double click on any available value in one scrolling box to add that value to the selected scrolling box on the right. You can choose a single value or multiple values. To select values within a range, select the first value and click the last value in the range while holding down the SHIFT key; then, click the arrow to add selections to the chosen box.
- Dependent and controlling picklists work in conjunction with each other. The value chosen in the controlling picklist affects the values available in its dependent picklist. Both controlling and dependent picklists are indicated on edit pages by an icon. Hover your mouse over the icon to display the name of the controlling or dependent picklist.

Guidelines for Entering Currency, Dates, Times, and Phone Numbers

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

Creating and editing records is easier if you understand a few guidelines and tips for the currency, date, time, and phone number fields you'll find in various records.

Currency

In most Salesforce editions, the format and currency type you can use for currency fields, such as `Quota` or `Annual Revenue`, are determined by the `Currency Locale` setting for your company. In Group, Professional, Enterprise, and Unlimited Edition organizations that use multiple currencies, the format and currency type are determined by the `Currency` field in the record you're creating or editing.

Tip: When you enter a monetary amount (or any other type of number), you can use the shortcuts **k**, **m**, or **b** to indicate thousands, millions, or billions. For example, when you enter `50k` it appears as `50,000`. However, these shortcuts do not work for filter criteria.

Dates and Times

Many fields allow you to enter a date or a time in the format specified by your personal `Locale` setting.

When entering dates, you can choose a date from the calendar, or manually enter a date.

Only dates within a certain range are valid. The earliest valid date is 1700-01-01T00:00:00Z GMT, or just after midnight on January 1, 1700. The latest valid date is 4000-12-31T00:00:00Z GMT, or just after midnight on December 31, 4000. These values are offset by your time zone. For example, in the Pacific time zone, the earliest valid date is 1699-12-31T16:00:00, or 4:00 PM on December 31, 1699.

Tip:

- Years appear and are saved as four digits, but you can enter the final two digits and Salesforce will determine the first two. Entries `60` through `99` are assumed to be in the 20th century (for example: `1964`), and entries `00` to `59` are assumed to be in the 21st century (for example: `2012`).
- If you enter numbers for month and day only (example: `01/15`), Salesforce supplies the *current* year.
- If your locale and language are English, you can enter words like `Yesterday`, `Today`, and `Tomorrow`, or any day of the week, and Salesforce figures it out. Week day names (such as `Monday`) are always considered to be in the following week.

Phone Numbers

When you enter phone numbers in various phone fields, Salesforce preserves whatever phone number format you enter. However, if your `Locale` is set to English (United States) or English (Canada), ten-digit phone numbers and eleven-digit numbers that start with "1" are automatically formatted as `(800) 555-1212` when you save the record..

Tip:

- If you do not want the parentheses-space-hyphen formatting (`(800) 555-1212`) for a ten- or eleven-digit number, enter a "+" before the number. For example: `+49 8178 94 07-0`.
- If your ten- and eleven-digit phone numbers have Salesforce's automatic format, you may need to enter the parentheses when specifying filter conditions. For example: `Phone starts with (415).`

Adding Notes to Records

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

Enhance record information by adding notes. A note can contain up to 32 KB of data. If Spell Checker is enabled for your organization, you can check the body (but not the title) of your note. Any note you add from a contact or opportunity record will appear in the Notes and Attachments related list of that record, as well as in the related list for the account it is associated with.

1. Click **New Note** in the Notes and Attachments related list of a record. Enter a title and body text.
2. If Spell Checker is enabled for your organization, click **Check Spelling** to check the spelling of the note.
3. Click **Save**

See Also:

Attaching Files to Records
Viewing and Editing Google Docs, Notes, and Attachments
Deleting Notes and Attachments from Records

Attaching Files to Records

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

User Permissions Needed	
To attach files to records:	"Edit" on the object

You can attach files—such as Microsoft® Office documents, Adobe® PDFs, and images and videos—to most kinds of Salesforce records. The size limit for an attached file is 5 MB when attached directly to the related list, including a file attached to a solution.The size limit for all files attached to an email is 10 MB.

1. Open the record
2. Click **Attach File**.
3. Click **Browse** and find the file you want to attach
4. Click **Attach File** to upload the file.
5. Click **Done** when the upload is finished

Note:

- When a file is attached to a record's Chatter feed it's added to the Notes and Attachments related list as a feed attachment. The file size limit for Chatter feed attachments is 2 GB.
- If the `Disallow HTML documents and attachments` security setting is enabled for your organization, you cannot upload files with the following file extensions: `.htm`, `.html`, `.htt`, `.htx`, `.mhtm`, `.mhtml`, `.shtm`, `.shtml`, `.acgi`.

Note and Attachment Fields

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

Notes and attachments have the following fields, listed in alphabetical order.

Attachment Fields	
Field	**Description**
`Description`	Description of the uploaded file.
`File Name`	Name of the uploaded file.
`Private`	Checkbox to indicate that the attachment is only accessible to the owner and administrators. For administrators to view private attachments, they need the "View All Data" permission; to edit them, they need the "Modify All Data" permission.

Attachment Fields	
Field	**Description**
`Share With Connections`	Checkbox to indicate that the attachment is shared with connections when the parent record is shared. This checkbox is only available if Salesforce to Salesforce is enabled, the parent record is shared, and the attachment is public.
`Size`	Size of the uploaded file.

Note Fields	
Field	**Description**
`Body`	Text of the note. Can hold up to 32 KB of data.
`Private`	Checkbox to indicate that note is only accessible to the owner and administrators. For administrators to view private notes, they need the "View All Data" permission; to edit them, they need the "Modify All Data" permission.
`Title`	Short description of note. Up to 80 characters are allowed in this field.

Checking Your Spelling

Available in: **All** Editions

If Spell Checker is enabled for your organization, you can check your spelling in certain features where you enter text, such as emails, events, tasks, cases, notes, and solutions. Spell Checker does not support all the languages that Salesforce supports. For example, Spell Checker doesn't support Thai, Russian, and double-byte languages, such as Japanese, Korean, or Chinese.

To check your spelling, just look for the **Check Spelling** button wherever you're entering text.

EDIT RECORDS

Editing Records

Available in: **All** Editions

User Permissions Needed	
To edit records:	“Edit” on the object for the kind of record you’re editing

1. Make sure you’re aware of any guidelines for the kind of record you’re editing. The Salesforce help will tell you.
2. Find and open the record you want to edit.
3. Click **Edit**.
4. Enter or edit values in the fields. Required fields are identified with a red bar (|).

   Tip: Most objects have field definitions in the Salesforce help. Just search the help for the object name + “fields”. For example, if you’re creating or editing an account record and want to know more about your options in the `Industry` drop-down list, look up “Account Fields” in the help.

5. When you finish entering or editing values, click **Save**.

See Also:

Creating Records
Guidelines for Entering Currency, Dates, Times, and Phone Numbers
Editing Records Quickly with Inline Editing
Editing Records Directly From Enhanced Lists
Adding Notes to Records
Attaching Files to Records
Checking Your Spelling

Changing a Record's Record Type

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

User Permissions Needed	
To change the record type for a record:	"Edit" on the object

Record types determine the picklist values that are available when you create or edit a record. When creating a record, you can choose the record type if you have different record types available and you have not set your record type preferences to bypass the record type selection page.

1. Open the record.
2. Click **Change** next to the `Record Type` field on a record detail page.

   Note: For campaign members, click **Change** next to the `Campaign Member Type` field on a campaign detail page. You must have the `Marketing User` user permission to change the campaign member type.

3. Select a record type. The available record types are listed at the bottom of the page.
4. Click **Continue**.
5. Click **Save**.

Note:

If your organization uses person accounts, your administrator has configured two different kinds of record types for your organization's accounts: one for business accounts, and another for person accounts. You can change an account's record type only to another record type of the same kind. For example, you cannot change a person account record type to one designated for business accounts.

Editing Records Quickly with Inline Editing

Inline editing settings available in: **All** Editions except **Database.com**

User Permissions Needed	
To use inline editing:	"Edit" on the object

Inline editing lets users quickly edit field values, right on a record's detail page.

To edit a record using inline editing:

1. Hover your mouse over the field you want to change:
   - indicates an editable field

- indicates a read-only field (such as `Last Modified By`)

2. Double-click the highlighted region next to the field. The field changes to edit mode. Salesforce displays compound fields in a dialog box so that all portions of the field can be edited. Examples of compound fields include addresses, first and last names, dependent picklists, and dependent lookups.
3. Enter the new value. Press **Esc** while your cursor is in a field's edit box to revert a change for that field.
4. Click away from the field to confirm your change and continue making edits. If you are editing a field that is not a text area field, you can also press **Enter** to confirm your change. Confirmed changes display in bold orange text. To revert a change, click next to the field.
5. Press **Enter** again or click **Save** to commit all confirmed changes.

Important: Salesforce doesn't save confirmed changes to field values until you commit them by pressing the **Enter** key a second time or clicking **Save**. Navigating away from the page without committing changes cancels all edits made to the record.

Tips for Saving Inline Edits

- Press **Enter** while your cursor is in a field's edit box to confirm the change for that field.
- Press **Enter** when no fields are in edit mode to save all edits to the record.

Unsupported Behaviors

- Inline editing isn't available in:
  - ◊ Accessibility mode
  - ◊ Setup pages
  - ◊ Dashboards
  - ◊ Customer Portal
  - ◊ Descriptions for HTML solutions
- The following standard checkboxes on case and lead edit pages are not inline editable:
  - ◊ Case Assignment (`Assign using active assignment rules`)
  - ◊ Case Email Notification (`Send notification email to contact`)
  - ◊ Lead Assignment (`Assign using active assignment rule`)
- The fields in the following standard objects are not inline editable.
  - ◊ All fields in Documents and Pricebooks
  - ◊ All fields in Tasks except for `Subject` and `Comment`
  - ◊ All fields in Events except for `Subject`, `Description`, and `Location`
  - ◊ Full name fields of Person Accounts, Contacts, and Leads. However, their component fields are, for example, `First Name` and `Last Name`.
- You can use inline editing to change the values of fields on records for which you have read-only access, either via field-level security or your organization's sharing model; however, Salesforce doesn't let you save your changes, and displays an insufficient privileges error message when you try to save the record.

Special Cases

- Inline editing is available on detail pages for all editable fields on edit pages, except for some fields on tasks, events, price books, and documents. To edit any of these, navigate to the edit page of a record, change the value of the field desired, and then click **Save**. The following table lists the objects that have inline editing restrictions on some of their fields. You may need special permissions to view some of these fields:

Object	Fields
All Objects	All fields are editable except long text area fields.
Opportunities	All fields are editable, except the following fields are only editable on detail pages (not on list views): ◊ `Amount` ◊ `Stage` ◊ `Forecast Category` ◊ `Quantity`
Leads	All fields are editable, except `Lead Status` is only editable on detail pages (not on list views).
Cases	All fields are editable, except `Case Status` is only editable on detail pages (not on list views).
Contracts	All fields are editable, except `Contract Status` is only editable on detail pages (not on list views).
Events	Only the following fields are editable: ◊ `Description` ◊ `Location` ◊ `Subject` ◊ `Type` ◊ Custom fields
Tasks	Only the following fields are editable: ◊ `Call Type` ◊ `Description` ◊ `Subject` ◊ `Type` ◊ Custom fields
Documents	No fields are editable.
Pricebooks	No fields are editable.

Editing Records Directly From Enhanced Lists

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

User Permissions Needed	
To use inline editing in an enhanced list:	“Mass Edit from Lists”

If both inline editing and enhanced lists are enabled for your organization, you can edit records directly in a list. Editable cells display a pencil icon ( ) when you hover over the cell, while non-editable cells display a lock icon ( ).

Warning: In enhanced list views, when different users make inline edits to the same fields on a record simultaneously, records are updated with the most recent edit, but we don’t identify the conflict with a message.

If you have the “Mass Edit from Lists” permission, you can change the value for a common field in up to 200 records at a time for most kinds of records. Products must be edited one at a time.

To edit a single record from a list:

1. From the list, double-click the editable cell.
2. Enter the value you want.
3. Click **OK**.

To mass edit records from a list:.

1. Select the checkbox next to each record you want to edit. You can select records on multiple pages.
2. Double-click one of the cells you want to edit. Apply your edit to just one record or to every record you selected.

If you encounter any errors when trying to update records, a console window appears, showing the name of each record in error (if known), as well as an explanation. Click a record in the console window to open its detail page in a new window.

Note: To view the error console, you must have pop-up blockers disabled for the Salesforce domain.

Tips for Using Inline Editing with Lists

Note the following tips when using inline editing with lists:

- Some standard fields do not support inline editing. For example, `Case Status`, `Opportunity Stage`, `Opportunity Amount`, `Opportunity Quantity` and `Lead Status`, and most Task and Event fields can only be edited from a record's edit page. For more information, see Editing Records Quickly with Inline Editing on page 73.
- If your organization uses record types, inline editing with lists is only available when all of the records in the list are of the same record type. Therefore, you must specify a filter of `Record Type equals X`, where *X* is the name of a single record type (or blank for the master record type).
- To perform inline editing on an enhanced list, filter logic must be turned off in the list view filter criteria.
- For lists of activities, you must specify an additional filter of either `Task equals True` (for tasks) or `Task equals False` (for events) for inline editing to be available.
- If your organization is using Person Accounts:

◊ You can't use inline editing to change them from a Contact list. You can only inline edit Person Accounts from an Account list.\
◊ You can only use inline editing on contacts associated to business accounts by specifying an additional filter of `Is Person Account EQUALS False` in your list criteria.

DELETE RECORDS

Deleting Records

Available in: **All** Editions

User Permissions Needed	
To delete records:	"Delete" on the object for the kind of record you're deleting

Deleting records is standard procedure for mostSalesforce users. When you delete a record, it's moved the to Recycle Bin, which you can empty.

For some kinds of objects, deleting one record affects other, related records. For example, if you delete an account or contact, all associated assets are also deleted.

1. Make sure you're aware of the effects (if any) of deleting the kind of record you want to delete. The Salesforce help will tell you.
2. Find and open the record you want to delete.
3. Click **Delete**.
   The record is moved to the Recycle Bin. Empty the Recycle Bin to complete the deletion process.

   Tip: If you delete a record by mistake, you can "undelete" it from the Recycle Bin. Good as new!

See Also:

Using the Recycle Bin
Deleting Notes and Attachments from Records

Deleting Notes and Attachments from Records

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

To delete a note or attachment, click **Del** next to the note or attachment in the Notes and Attachments related list or Attachments related list of a record. Deleted notes and attachments can be restored from the Recycle Bin.

To delete a file that was attached from a Chatter feed, click **Del** next to the feed attachment. This removes the file from all Chatter feeds where it's been shared and deletes the file from the Notes and Attachments related list. Restore the file by clicking on the Recycle Bin, selecting the file, and clicking **Undelete**. If the file was attached from your computer, a Chatter feed, group, or a Salesforce CRM Content library, deleting it from the Notes and Attachments related list also removes it from the post, but doesn't delete it from its original location.

See Also:

Viewing and Editing Google Docs, Notes, and Attachments

RECORDS FAQ

What formats should I use for dates, times, and names in Salesforce?

The format used for dates, times, and names of people in Salesforce is determined by your `Locale` setting.

To find out what date/time format your `Locale` setting uses:

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
   - If you clicked **Setup**, select **My Personal Information** > **Personal Information**.
   - If you clicked **My Settings**, select **Personal** > **Advanced User Detail**.
3. View the date/time format used in the read-only `Created By` field. This is the format you should use for entering dates and times in Salesforce fields.

How do I allow only certain users to share data?

If your Professional, Enterprise, Unlimited, or Developer Edition organization has a Private or Public Read Only sharing model, your administrator can still allow certain users to share information. Your administrator can create public groups and then set up sharing rules to specify that users in certain roles or groups will always share their data with users in another role or public group. Individual users can also create personal groups to give access to their own accounts, contacts, and opportunities.

Can an individual user control the sharing of records they own?

Yes. In Professional, Enterprise, Unlimited, and Developer Edition organizations, all account owners are empowered to further extend the sharing on an account-by-account basis. For example, if the organization has a Private model, the Acme account owner can share this account and its related data to selected groups, or to individual users.

In Enterprise, Unlimited, and Developer Editions, opportunity owners can also extend the sharing for individual opportunities separately from account sharing.

You can use account, lead, case, and opportunity sharing to increase access to your data; you cannot restrict access beyond your organization's default access levels.

This type of sharing is called manual sharing, and is done by the **Sharing** button on the record detail page.

Can I transfer records to other users?

Yes, in Contact Manager, Group, Professional, Enterprise, Unlimited, and Developer Editions, you can transfer records you own.

If you're an administrator, you can transfer ownership of all leads or accounts and related data from one user to another. From Setup, click **Data Management** > **Mass Transfer Records**.

How do I print Salesforce records?

To print the details of a Salesforce record:

1. Click the **Printable View** link located in the upper right corner of most detail pages. A new browser window opens with the record displayed in a simple, print-ready format.
2. Optionally, collapse and expand individual sections in the printable view by clicking the triangles next to the section headings.
3. Optionally, click **Expand All** or **Collapse All** to show or hide all of the collapsible sections on the page. Related lists, such as the list of opportunities related to an account, are not collapsible.
4. Click **Print This Page** or use your browser's print function to send the page to a printer.

Note: On the Console tab, you can click the print icon ( ) to open a record's printable view.

MONITOR AND ANALYZE YOUR DATA

Run a Report

To run a report, find it on the Reports tab and click the report name. Most reports run automatically when you click the name. If you're already viewing a report, click **Run Report** to run it immediately or schedule a future run.

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

User Permissions Needed	
To run reports:	"Run Reports"
To schedule reports:	"Schedule Reports"
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"

If you don't see any results, check the report for one of these conditions:

- The report didn't return any data. Check your filter criteria to make sure some data is returned.
- Due to field-level security, you don't have access to one of the groupings you selected.
- Your custom summary formula's context didn't match the chart settings. For example, if the formula is calculated for Industry, but the chart doesn't include Industry, no results are returned.
- Your values are out of the range of acceptable values. The maximum value allowed is 999999999999999. The minimum value allowed is -99999999999999.

If your report returns more than 2,000 records, only the first 2,000 records are displayed. To see a complete view of your report results, click **Export Details**.

If your report takes longer than 10 minutes to complete, Salesforce cancels the report. Try the following techniques to reduce the amount of data in your report:

- Filter for your own records, rather than all records.
- Limit the scope of the data to a specific date range.
- Exclude unnecessary columns from your report.
- Hide the report details.

See Also:

Run a Joined Report

JOINED REPORTS

Run a Joined Report

Joined reports run in an updated version of the run reports page.

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

User Permissions Needed	
To run reports:	“Run Reports”
To create, edit, and delete reports:	“Create and Customize Reports” AND “Report Builder”

From the joined reports run page, you can:

- Click **Run Report** to run the report.
- Show or hide details
- Click **Customize** to open the report in report builder.
- Save or delete the report.
- Click **Report Properties** to change the report's name, description, or folder.
- View the report generation status.

See Also:

Run a Report

Add Filter Logic

Filter logic lets you specify conditions for your filters using logical operators.

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

User Permissions Needed	
To create, edit, and delete reports:	"Create and Customize Reports" AND "Report Builder"
To create custom list views:	"Read" on the type of record included in the list
To create, edit, or delete public list views:	"Manage Public List Views"

To change the default AND relationship between each filter:

1. Click **Add** > **Filter Logic**.
2. Enter each filter line number, separated by an operator:

Operator	Definition
AND	Finds records that match both values.
OR	Finds records that match either value.
NOT	Finds records that exclude values.

See Also:

Filter Operators
Filter on Blank Values
Filtering on Special Picklist Values

Filter Operators

The operator in a filter is like the verb in a sentence. When you choose filter criteria, use an operator to specify the action you want the filter to take.

You can use the following operators when entering filter criteria on list views, reports, dashboards, and some custom fields:

Operator	Uses
equals	Use for an exact match; for example, "Created equals today."
less than	Use for results that are less than the value you enter; for example, "Quota less than 20k" returns records where the quota field ranges from 0 to 19,999.99.
greater than	Use when you want results that exceed the value you enter; for example, "Quota greater than 20k" returns records where the quota amount begins at 20,000.01.
less or equal	Use for results that match or are less than the value you enter.
greater or equal	Use for results that match or exceed the value you enter.

Operator	Uses
not equal to	Shows results that don't have the value you enter. This is especially useful for eliminating empty fields; for example, "Email not equal to <blank>."
contains	Use for fields that include your search string but might also include other information. For example, "Account contains california" would find California Travel, California Pro Shop, and Surf California. Keep in mind that if you enter a short search string, it may match on a longer word. For example, "Account contains pro" would find California Pro Shop and Promotions Corporation.
does not contain	Eliminates records that do not contain the value you enter; for example, "Mailing Address Line 2 does not contain P. O. Box." **Note:** When specifying filter criteria on roll-up summary fields, `does not contain` uses "or" logic on comma-separated values. On list views, reports, and dashboards, `does not contain` uses "and" logic.
starts with	Use when you know what your value starts with, but not the exact text. This is a narrower search term than "contains." For example, if you enter "Account starts with california" you would find California Travel and California Pro Shop, but not Surf California.
includes	Available when you choose a multi-select picklist as the selected field. Use this operator to find records that include one or more of the values you enter. For example, if you enter "Interests includes hockey, football, baseball" you would find records that only have hockey selected as well as those that have two or three of the values entered. Results do not include partial matches of values.
excludes	Available when you choose a multi-select picklist as the selected field. Use this operator to find records that do not contain any values that match the ones entered. For example, if you enter "Interests exclude wine, golf" your report lists records that contain any other values from that picklist, including those that are blank. Results do not include partial matches of values.
between	Available for dashboard filters only. Use to filter on ranges of values. For each range, the filter returns results that are greater than or equal to the minimum value and less than the maximum value. For example, if you enter "Number of Employees between 100 and 500," your results include accounts with 100 employees up to those with 499 employees. Accounts with 500 employees aren't included in the results.
within	Available when you create list views based on a Geolocation custom field. Shows results that are within the specified radius from a fixed latitude and longitude. For example, if you enter "Warehouse location within 50 miles 37.775° –122.418°," your list view includes all warehouses within a 50–mile radius of San Francisco, California.

Filter on Blank Values

Tips on filtering using blank values.

Available in: **All** Editions

- When you use the “less than,” "greater than,” “less or equal,” or “greater or equal” operators on fields that have numeric values, records with blank or “null” values are returned as if their value is zero (0). For example, if you create a workflow rule or a lead assignment rule for accounts with the criteria `Annual Revenue less than 100000`, account records match if their `Annual Revenue` is blank.

  However, records with blank field values are not considered matches in report filters, custom list views, and account assignment rules (which assign accounts to territories).
- To limit results to records that are blank or contain “null” values for a particular field, choose the field and the “equals” or “not equal to” operators, leaving the third field blank. For example, `Amount equals` returns records with blank amount fields. You can search for blank values or other specified values at the same time. For example, `Amount equals 1,,2` returns records where the `Amount` is blank or contains the value “1” or “2”.

Filtering on Special Picklist Values

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

When creating filter criteria, you can use special picklist values for your search criteria. These are special picklists with values of either `True` or `False`.

For example, to show all opportunities you have won, enter `Won equals True` as your search criteria. To show all closed/lost opportunities, enter `Closed equals True` and `Won equals False`.

Note: If you are creating filter criteria for a report or list view, the lookup icon automatically displays when you choose to filter on one of the special picklists. Click the lookup icon to choose the value `True` or `False`. Alternatively, you can manually enter `True or False` in the filter criteria.

These are the available fields and their values:

Special Picklist Field	Value	Description
Accounts and contacts: `Is Person Account`	`True`	The account is a person account. Note that your administrator may have customized the name of this field. This field displays as the person account icon ( ).
	`False`	The account is a business account.
Accounts, leads, and opportunities: `Partner Account`	`True`	The account is a partner account, or the lead or opportunity owner is a partner user.

Special Picklist Field	Value	Description
	`False`	The account is not a partner account or the lead or opportunity owner is not a partner user.
Activities: `All-day`	`True`	Applies only to events, not tasks. The event is marked as an all day event.
	`False`	The event has a specific time.
Activities: `Closed`	`True`	Applies only to tasks, not events. The task has been closed, that is, the task `Status` field has a "Closed" value.
	`False`	Task is still open.
Activities: `Event Invitation` (Only for reports)	`True`	Applies only to events, not tasks. The event is the meeting invite sent to another user for a multi-person event.
	`False`	The event is the original multi-person event assigned to the event host.
	`False`	Activity does not have a green sheet.
Activities: `Task`	`True`	Activity is a task, not an event.
	`False`	Activity is an event.
Campaigns: `Active`	`True`	Campaign is active and can be chosen from various campaign picklists, for example, in the campaign import wizards.
	`False`	Campaign is inactive.
Cases: `Closed`	`True`	The case is closed, that is, the case `Status` field has a "Closed" value.
	`False`	Case is still open.
Cases: `Escalated`	`True`	Case has been automatically escalated via your organization's escalation rule.
	`False`	Case has not been escalated.
Cases: `New Self-Service Comment`	`True`	Case has a new comment added by a Self-Service user.
	`False`	Case does not have a new Self-Service comment.
Cases: `Open` (Only for reports)	`True`	The case is open, that is, the case `Status` has a value that is not equivalent to "Closed."
	`False`	Case has been closed.
Cases: `Self-Service Commented`	`True`	Case has a comment added by a Self-Service user.
	`False`	Case does not have a Self-Service comment.
Contacts: `Email Opt Out`	`True`	The contact cannot be included in a mass email recipient list.
	`False`	The contact may receive mass email.
Contacts: `Self-Service Active`	`True`	The contact is enabled to log in to your Self-Service portal.

Special Picklist Field	Value	Description
(Only for reports)	`False`	The contact is not enabled for Self-Service.
Leads: `Converted` (Only for reports)	`True`	The lead has been converted.
	`False`	The lead has not been converted.
Leads: `Email Opt Out`	`True`	The lead cannot be included in a mass email recipient list.
	`False`	The lead may receive mass email.
Leads: `Unread`	`True`	The lead has not yet been viewed or edited by the owner since it was assigned to that user.
	`False`	The lead has been viewed or edited at least once by the owner since it was assigned.
Opportunities: `Closed`	`True`	The opportunity is closed, that is, the `Stage` field has a value of the type Closed/Won or Closed/Lost.
	`False`	The opportunity is still open.
Opportunities: `Primary` (Only for Partner Opportunities report)	`True`	The partner for the opportunity has been marked as the primary partner.
	`False`	The partner for the opportunity has not been marked as the primary partner.
Opportunities: `Private`	`True`	The opportunity owner has checked the `Private` box on the opportunity edit page.
	`False`	The `Private` box on the opportunity is not checked.
Opportunities: `Won`	`True`	The opportunity is closed and won, that is, the `Stage` field has a value of the type Closed/Won.
	`False`	The opportunity has not been won. The `Stage` field may have a value of the type Open or Closed/Lost.
Products: `Active`	`True`	Product is active and can be added to opportunities in Enterprise and Unlimited Edition organizations.
	`False`	Product is inactive and cannot be added to opportunities.
Product: `Has Quantity Schedule`	`True`	Product has a default quantity schedule.
	`False`	Product does not have a default quantity schedule.
Product: `Has Revenue Schedule`	`True`	Product has a default revenue schedule.
	`False`	Product does not have a default revenue schedule.
Solutions: `Visible in Self-Service Portal`	`True`	The solution has been marked `Visible in Self-Service Portal` and is visible to Self-Service portal users.
	`False`	Solution is not marked `Visible in Self-Service Portal` and is not visible to Self-Service portal users.

Special Picklist Field	Value	Description
Solutions: `Reviewed`	`True`	The solution has been reviewed, that is, the solution `Status` field has a “Reviewed” value.
	`False`	Solution is not reviewed.
Solutions `Out of Date`	`True`	The translated solution has not been updated to match the master solution with which it is associated.
	`False`	The translated solution has been updated to match the master solution with which it is associated.
Users: `Active`	`True`	User is active and can log in.
	`False`	User is inactive and cannot log in.
Users: `Offline User`	`True`	User has access to use Connect Offline.
	`False`	User is not enabled for Connect Offline use.
Users: `Marketing User`	`True`	User can manage campaigns.
	`False`	User is not enabled to manage campaigns.
User: `Is Partner`	`True`	User is a partner user.
	`False`	User is not a partner user.

Note: The special picklists you can view are only those that are visible in your page layout and field-level security settings.

Sort Report Results

Sort a report by the data in a particular column by clicking on that column's heading. Clicking a column header sorts data according to that column’s ascending order: text is sorted from A to Z, numerical data is sorted from lowest to highest, and time/date data is sorted from earliest to latest.

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

User Permissions Needed	
To sort report results:	“Run Reports”

Tip: You can also group and subtotal your data to create subsets of information.

- To reverse the sort order, click the column heading a second time.
- If the floating report header is enabled for your organization, sort behavior is slightly different.

Floating report headers keep the column headings on tabular reports in sight no matter how far users scroll down report results. With floating report headers, users can scroll to the bottom of lengthy tabular reports without having to scroll back to the top to view the names of the column headings. Users can also click floating report headers to sort data in a specific column. When users sort data by clicking a floating report heading, the report refreshes and redirects users to the beginning of report results.

Visualizing Data with Dashboards

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.

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

User Permissions Needed	
To view and refresh dashboards:	“Run Reports” AND access to dashboard folder
To create dashboards:	“Run Reports” AND “Manage Dashboards”
To edit and delete dashboards you created:	“Run Reports” AND “Manage Dashboards”
To edit and delete dashboards you didn’t create:	“Run Reports,” “Manage Dashboards,” AND “View All Data”

Clicking the Dashboards tab displays the dashboard you viewed most recently. The top of the page shows the time the dashboard was refreshed last and the user whose permissions determine what data is visible on the dashboard.

Each component in a dashboard shows data from an underlying report. If you have access to the folder for the underlying source report, you can see the related dashboard component. Click a dashboard component or its elements to drill down to the source report, filtered report, record detail page, or other URL. If you drill down on a filtered component, the dashboard filters are applied to the source report.

Click **Go to Dashboard List** to view your dashboards. Find a dashboard using dashboard finder. Type a name in the `View Dashboard` field and choose a dashboard from the list of results. You can only see dashboards in folders you can access.

Follow a dashboard to get updates about the dashboard posted to your Chatter feed.

FIND AND ORGANIZE INFORMATION

SEARCH

Search Overview

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

Note: Global search and feed search are automatically enabled when Chatter is enabled. However, enabling Chatter disables sidebar search and advanced search.

Search for salesforce.com records and tags using:

Sidebar Search

From the sidebar search box you can search a subset of objects and fields. You can use wildcards and filters to refine your search.

Advanced Search

Click **Advanced Search...** in the sidebar to search a subset of objects in combination and more fields than sidebar search, including custom fields and long text fields such as descriptions, notes, and task and event comments. You can use wildcards, operators, and filters to refine your search.

Global Search

From the header search box you can search more objects than sidebar search and advanced search, including articles, documents, products, solutions, and Chatter feeds, files, groups, topics, and people. You can also search more fields than sidebar search, including custom fields, and long text fields such as descriptions, notes, and task and event comments. You can use wildcards, operators, and filters to refine your search. 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 search is not supported in a partner portal or Customer Portal.

Only users with supported browsers can use global search.

Contextual Feed Search

Global search is helpful when you want to look for information in feeds posts and comments across the organization.Use feed search ( ) to find information in a feed in a specific context. Click above the feed to look for information in that feed. For example, use the feed search on a group's page to find information in that group.You can search for information in feeds on a user's profile, a record, in a public or private group (if you're a member), and on the Chatter and Home tabs. A contextual feed search is helpful when you want to confirm or check if something was once discussed in that specific feed. You can search for hashtag topics, mentions, and files posted in the feed, or refine your search using wildcards, operators, and quotation marks to match on exact phrases.

Other Search Utilities

Some objects have unique search utilities on their tabs. Global search results include these objects with the exception of Article Management and Salesforce CRM Content. Neither sidebar search nor advanced search can find these objects; use the search feature on the tab to find them.

- Solutions
- Documents
- Salesforce CRM Content
- Products
- Articles
- Article Management

Tip: Your administrator can customize your Home tab to include the product, document, or solution search in the sidebar.

See Also:

Tags Overview
Searching in Chatter

How Search Works

Search uses custom algorithms, including natural language analysis (NLA) techniques such as tokenization, stemming (articles and files), and stopword lists, to return meaningful search results.

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

Tokenization breaks down all searchable text into smaller pieces at spaces, punctuation, and alphanumeric boundaries and stores them in search indexes. When you perform a search, your results include matches on the tokens in your search term. For example, a search for “web2lead” returns matches for “web”, “2”, and “lead”.

Stemming is the process of reducing a word to its root form. With stemming, search can match expanded forms of a search term, as long as they are the same figure of speech. For example, a search for “run” matches “run”, “running”, and “ran”, but not “runner”.

Stopword lists contain words that are ignored in search terms for each supported language (for example, “the”, “to”, and “for”). These words are removed from the search and are not matched on to avoid irrelevant results.

Search further refines matches based on:

- Proximity and frequency of search terms in an item
- Any search options you specify
- Pinned items on your search results page

- Item ownership
- Item popularity or importance determined by page views or the number of related lists
- Recent interaction with an item, for example if you view or edit a record

Two users performing the same search might have different search results, because searches are configured for the user performing the search. For example, if you own or recently viewed an item, its relevancy increases and the item moves higher in your search results.

How your search works depends on whether you're using sidebar, advanced, global search, or feed search.

See Also:

Search Overview

Searching in Salesforce.com

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

You can change search options before or after your search.

1. Enter your search terms in the sidebar or header search box.
2. Click **Search** (or **Go!** if you're using sidebar search).

Tips for Searching in Salesforce

- Your search term must have two or more characters. Special characters, such as " ? * ( ), aren't included in the character count. For example, a search for `(a)` won't return any search results.
- Search isn't case-sensitive. For example, a search for `california` finds the same items as a search for `California`.
- Find phone numbers by entering part or all of a number. For example, to find *(415) 999-3434*, enter `4159993434`, `999`, or `3434`. To search for the last seven digits, you must enter the punctuation, such as `999-3434`.
- In Chinese, Japanese, and Korean, you can find a person by entering last name before first name; searching for `jones bob` returns any person named Bob Jones.
- If you're using advanced search or global search, refine your search using operators such as AND, OR, and AND NOT.
- If you're using advanced search or global search, search for exact phrases by putting quotation marks around multiple keywords, for example, `"call john smith"` finds items with *call john smith*, but not items with *call john p. smith* or *john smith called*. If you're using sidebar search, your search string is automatically treated as a phrase search.
- Search for partially matching terms using wildcards.
    - ◊ Asterisks match zero or more characters at the middle or end (not the beginning) of your search term. For example, a search for `john*` finds items that start with *john*, such as, *john*, *johnson*, or *johnny*. A search for `mi* meyers` finds items with *mike meyers* or *michael meyers*. If you're using sidebar search, an * is automatically appended to the end of the search string.

◊ Question marks match only one character in the middle or end (not the beginning) of your search term. For example, a search for `jo?n` finds items with the term *john* or *joan* but not *jon* or *johan*. If you're using global search, the ? is removed from the end of your search term and isn't treated as a wildcard.

See Also:

Search Overview

Searchable Fields by Object

The types of records you can search vary according to the edition you have.

Search results contain matches for information within specific fields of each object. You can also search for tags. Lookup searches support fewer searchable fields for each object.

Note: Users can search for information in fields that are hidden from them by field-level security. When users search for a value in a field hidden from them, search results include the record that contains the field, even though users can't see the field.

- Article Fields
- Attachment Fields
- Business Account Fields
- Campaign Fields
- Calendar Event Fields
- Case Fields
- Chatter Feed Fields
- Chatter Group Fields
- Chatter Topic Fields
- Contact Fields
- Salesforce CRM Content Fields
- Contract Fields
- Contract Line Item Fields
- Custom Object Fields
- D&B Company Fields
- Document Fields
- Entitlement Fields
- File Fields
- Idea Fields
- Lead Fields
- Note Fields
- Opportunity Fields
- People Fields
- Person Account Fields

- Price Book Fields
- Product Fields
- Question Fields
- Quote Fields
- Report Fields
- Requested Meeting Fields
- Service Contract Fields
- Solution Fields
- Task Fields
- User Fields

Some objects can't be found by sidebar search or advanced search.Use global search or the object's tabs to find:

- Articles
- Chatter groups, files, people, and information in feeds

Tip: You can also use feed search to find information in a specific feed, such as in a group or a on user's profile.

- Salesforce CRM Content
- Documents
- Products
- Solutions

See Also:

Search Overview

Searchable Fields: Article

Available in: **Enterprise**, **Unlimited**, and **Developer** editions

Neither sidebar search nor advanced search are designed to find articles. To find an article, use global search or the search tools in the sidebar on the Articles tab.

	Search Type			
Field Searched	**Sidebar**	**Advanced**	**Global**	**Articles Tab**
All standard text fields			✓	✓
`Body`			✓	✓
`File`			✓	✓
All custom auto-number fields and			✓	✓

	Search Type			
Field Searched	**Sidebar**	**Advanced**	**Global**	**Articles Tab**
custom fields that are set as an external ID (You don't need to enter leading zeros.)				
All custom fields of type text, text area, long text area, rich text area, email, and phone			✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Asset

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** editions

		Search Type	
Field Searched	**Sidebar**	**Advanced**	**Global**
`Asset Name`	✓	✓	✓
`Description`		✓	✓
`Serial Number`	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Attachment

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

		Search Type	
Field Searched	**Sidebar**	**Advanced**	**Global**
File Name		✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Business Account

The available business account fields vary according to which Salesforce edition you have.

		Search Type	
Field Searched	**Sidebar**	**Advanced**	**Global**
Account Name	✓	✓	✓
Account Name (Local)	✓	✓	✓
Account Number	✓	✓	✓
Account Site	✓	✓	✓
Billing Address		✓	✓
Description		✓	✓
D-U-N-S Number (This field is only available to organizations that use Data.com Prospector)			✓
Fax	✓	✓	✓
Phone	✓	✓	✓
Shipping Address		✓	✓
Ticker Symbol	✓	✓	✓
Website	✓	✓	✓

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Campaign

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** editions

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Campaign Name`	✓	✓	✓
`Description`		✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Case

Available in: **Group**, **Professional**, **Enterprise**, **Unlimited**, and **Developer** editions

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Case Comments`		✓	✓
`Case Number` (You don't need to enter leading zeros.)	✓	✓	✓
`Description`		✓	✓
`Subject`	✓	✓	✓
`Web Company` (of person who submitted the case online)	✓	✓	✓
`Web Email` (of person who submitted the case online)	✓	✓	✓
`Web Name` (of person who submitted the case online)	✓	✓	✓
`Web Phone` (of person who submitted the case online)	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Chatter Feed

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

To find information in a feed, use global search or feed search. Neither sidebar search nor advanced search are designed to find information in Chatter feeds.

Note: Global search and feed search return matches for file or link names shared in posts, but not in comments.

	Search Type			
Field Searched	**Sidebar**	**Advanced**	**Global**	**Feed**
`@`*`Name`* (where *`Name`* is a user name—for example, @Madison Rigsby)			✓	✓
`Comment Body`			✓	✓
`Parent Record Name`			✓	✓
`Post Body`			✓	✓
`Poster Name`			✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Chatter Group

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

Neither sidebar search nor advanced search are designed to find Chatter groups. To find a Chatter group, use global search or the search tools on the Groups tab.

	Search Type			
Field Searched	**Sidebar**	**Advanced**	**Global**	**Groups Tab**
`Description`			✓	✓

	Search Type			
Field Searched	**Sidebar**	**Advanced**	**Global**	**Groups Tab**
`Group Name`			✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Chatter Topic

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

Neither sidebar search nor advanced search are designed to find Chatter topics. To find a topic, use global search.

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Description`			✓
`Name`			✓

See Also:

Searchable Fields by Object

Searchable Fields: Contact

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

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Assistant`	✓	✓	✓
`Asst. Phone`	✓	✓	✓
`Department`		✓	✓
`Description`		✓	✓

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Email`	✓	✓	✓
`Fax`	✓	✓	✓
`First Name`	✓	✓	✓
`First Name (Local)`	✓	✓	✓
`Home Phone`	✓	✓	✓
`Last Name`	✓	✓	✓
`Last Name (Local)`	✓	✓	✓
`Mailing Address`		✓	✓
`Mobile`	✓	✓	✓
`Other Address`		✓	✓
`Other Phone`	✓	✓	✓
`Phone`	✓	✓	✓
`Title`		✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

See Also:

[Searchable Fields by Object](#)

Searchable Fields: Salesforce CRM Content

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

Neither sidebar search nor advanced search are designed to find content. To find content, use global search (results appear as files) or the search tools on the Content tab.

See Also:

Searchable Fields by Object

Searchable Fields: Contract

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** editions

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Billing Address`		✓	✓
`Contract Name`	✓	✓	✓
`Contract Number`	✓	✓	✓
`Description`		✓	✓
`Shipping Address`		✓	✓
`Special Terms`		✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Contract Line Item

Available in: **Enterprise**, **Unlimited**, and **Developer** editions with the Service Cloud

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Description`		✓	✓
`Name`	✓	✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Custom Object

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

Custom object records appear in search results only if they have a custom tab.

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Name`	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type email and phone	✓	✓	✓
All custom fields of type text, text area, long text area, and rich text area		✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: D&B Company

Data.com Prospector license available in: **Contact Manager** (no Lead object), **Group**, **Professional**, **Enterprise**, and **Unlimited** Editions
Data.com Clean license available in: **Professional**, **Enterprise**, and **Unlimited** Editions

To have access to D&B Company records, your organization must have Data.com Premium Prospector or Data.com Premium Clean.

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Company Description`			✓
`D-U-N-S Number`			✓
`Facsimile Number`			✓
`Mailing Address`			✓
`Primary Address`			✓
`Primary Business Name`			✓
`Telephone Number`			✓
`Ticker Symbol`			✓
`URL`			✓

See Also:

Searchable Fields by Object

Searchable Fields: Document

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

To find a document, use global search or the **Find Document** button on the Documents tab. Neither sidebar search nor advanced search are designed to find documents.

See Also:

Searchable Fields by Object

Searchable Fields: Entitlement

Available in: **Enterprise**, **Unlimited**, and **Developer** editions with the Service Cloud

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Name`	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: File

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

Neither sidebar search nor advanced search are designed to find files. To find a file, use global search or the search tools on the Files tab.

		Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**	**Files Tab**
`Body`			✓	✓
`Description`			✓	✓
`Extension` (such as ppt)			✓	✓
`Name`			✓	✓
`Owner`			✓	✓

	Search Type			
Field Searched	**Sidebar**	**Advanced**	**Global**	**Files Tab**
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)			✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone			✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Idea

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** editions

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Comment`		✓	✓
`Description`		✓	✓
`Title`	✓	✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Lead

Available in: **Group**, **Professional**, **Enterprise**, **Unlimited**, and **Developer** editions

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Address`		✓	✓
`Company`	✓	✓	✓
`Company D-U-N-S Number` (This field is only available to organizations that use Data.com Prospector)			✓
`Description`		✓	✓
`Email`	✓	✓	✓
`Fax`	✓	✓	✓
`First Name`	✓	✓	✓
`First Name (Local)`	✓	✓	✓
`Last Name`	✓	✓	✓
`Last Name (Local)`	✓	✓	✓
`Mobile`	✓	✓	✓
`Phone`	✓	✓	✓
`Title`		✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Note

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

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Body`		✓	✓
`Title`	✓	✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Opportunity

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

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Description`		✓	✓
`Opportunity Name`	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: People

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

Neither sidebar search nor advanced search are designed to find people; however, sidebar search and advanced search can be used to find users. See Searchable Fields: User.

To find people, use global search or the search tools on the People tab.

	Search Type			
Field Searched	**Sidebar**	**Advanced**	**Global**	**People Tab**
`About Me`			✓	
`Email`			✓	
`First Name`			✓	✓
`Last Name`			✓	✓
`Name`			✓	✓
`Nickname`			✓	✓
`Phone`			✓	
`Record ID` (15 character Record ID only)			✓	
`Username`			✓	
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)			✓	
All custom fields of type text, text area, long text area, rich text area, email, and phone			✓	

Note: Information in hidden fields on a profile is not searchable by other partners and customers in the community, but is searchable by users in the company's internal organization.

See Also:

Searchable Fields by Object

Searchable Fields: Person Account

Available in: **Enterprise**, **Unlimited**, and **Developer** editions

The available person account fields vary according to which Salesforce edition you have.

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Account Name`	✓	✓	✓
`Account Name (Local)`	✓	✓	✓
`Account Number`	✓	✓	✓
`Account Site`	✓	✓	✓
`Assistant`	✓	✓	✓
`Assistant Phone`	✓	✓	✓
`Billing Address`		✓	✓
`Description`		✓	✓
`Email`	✓	✓	✓
`Fax`	✓	✓	✓
`Home Phone`	✓	✓	✓
`Mailing Address`		✓	✓
`Mobile`	✓	✓	✓
`Other Address`		✓	✓
`Other Phone`	✓	✓	✓
`Shipping Address`		✓	✓
`Ticker Symbol`	✓	✓	✓
`Title`		✓	✓
`Website`	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
All account and contact custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Price Book

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** editions

Neither sidebar search nor advanced search are designed to find price books. To find a price book, use global search or the **Price Books** area on the Products tab.

See Also:

Searchable Fields by Object

Searchable Fields: Product

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** editions

Neither sidebar search nor advanced search are designed to find price books or products. To find a product, use global search or the **Find Products** area on the Products tab.

See Also:

Searchable Fields by Object

Searchable Fields: Question

Available in: **Enterprise**, **Unlimited**, and **Developer** editions

The Answers tab in Salesforce lists all the questions posted to an answers community.

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Question Body`		✓	✓
`Question Title`	✓	✓	✓
`Reply Body`		✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Quote

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** editions

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Quote Name`	✓	✓	✓
`Quote Number`	✓	✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Report

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

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Description`	✓	✓	✓
`Report Name`	✓	✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Service Contract

Available in: **Enterprise**, **Unlimited**, and **Developer** editions with Service Cloud

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Contract Number`	✓	✓	✓
`Description`		✓	✓
`Name`	✓	✓	✓
`Special Terms`		✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: Solution

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** editions

Neither sidebar search nor advanced search are designed to find solutions. To find a solution, use global search or the **Find Solution** button on the Solutions tab.

See Also:

Searchable Fields by Object

Searchable Fields: Task, Calendar Event, and Requested Meeting

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

Archived activities are accessible in advanced search only.

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`Comments` (task and events only)		✓	✓
`Subject`	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

See Also:

Searchable Fields by Object

Searchable Fields: User

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

If you're using Chatter and searching for people, see Searchable Fields: People.

	Search Type		
Field Searched	**Sidebar**	**Advanced**	**Global**
`About Me`		✓	✓
`Email`	✓	✓	✓
`First Name`	✓	✓	✓
`Last Name`	✓	✓	✓
`Name`	✓	✓	✓
`Nickname`	✓	✓	✓
`Phone`	✓	✓	✓
`Record ID` (15 character Record ID only)	✓	✓	✓
`Username`	✓	✓	✓
All custom auto-number fields and custom fields that are set as an external ID (You don't need to enter leading zeros.)	✓	✓	✓
All custom fields of type text, text area, long text area, rich text area, email, and phone		✓	✓

See Also:

Searchable Fields by Object

Tags that Show Up in Search

Available in: **All** editions

You can search for tags in sidebar, advanced, and global search.

See Also:

Searchable Fields by Object

Search Results

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

Your search results include items and tags that you have permission to view. How your results appear and how you can interact with them depends on whether you're using:

- Sidebar or advanced search
- Global search

Regardless of your search type, you can:

- Filter your search results
- Customize columns in your search results
- (Administrators only) Customize filters for all users' search results

Search Results

Available in: **All** Editions

The search results page displays items for each object, custom object, tag, and Chatter feed that you have permission to view.

From this page, you can:

- Jump directly to an object's results—click any object on the left side of the page.

  The number of results for each object is displayed. For example, Contacts [25+] means there are more than 25 contacts that match your search criteria. If your search returns a large number of results for a particular object, click **Next Page** or **Previous Page** to view the results.
- Jump to Chatter Feed Search Results.
- View or edit items—click an item to open it or click **Edit**, if available.
- Refine your search results by clicking **Options...** below the search box or above the list of objects on the left hand side:

Choose which objects to search

In the Objects section, select the objects for which you want to return search results. If you don't select any objects, your search returns all possible objects. Select **All** or click **Clear All** to quickly select all or no objects.

Search only items you own

In the More Options section, select `Limit to items I own`.

Note: When `Limit to items I own` is selected, the search results don't return article, asset, idea, invoice, order, people, product, question, quote, and reply records because these records don't have owners.

Search for an exact phrase

In the More Options section, select `Exact phrase`. This is the same as using quotation marks around your search string.

Search within a division

If you have the Affected by Divisions permission, specify which divisions you want to search. If your organization uses divisions but you don't have the "Affected by Divisions" permission, your search results include records from all divisions.

- Click **Search**.

The search options you select are saved until you change them. Click ⊗ to clear your search terms.

Note: Chatter feed searches aren't affected by your search scope; Chatter feed search results include matches across all objects.

Search options aren't available to Chatter Free users.

- Customize columns in your search results.
- Filter your search results.

SIDEBAR SEARCH

How Sidebar Search Works

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

How your sidebar search works depends on your search options, search terms, and the use of wildcards.

Search Options

Sidebar search searches only a subset of records and fields, including name, phone, email, and standard address fields.

If the sidebar search drop-down list is available, you can limit your search to only tags or the records for a single object. If the sidebar search `Limit to items I own` checkbox is available, you can select this box to limit your search to records you own.

Search Terms

Searches are conducted as a *phrase search* and match terms in the exact sequence that they appear. For example, searching for `bob jones` returns items with *Bob Jones*, but not *Bobby Jones* or *Bob T Jones*. Likewise, searching for `acct!4` only returns items with *acct!4* in a single string.

Wildcards and Operators

You can use the * (asterisk) and ? (question mark) wildcards to refine results. Use * to match one or more characters, or ? to match a single character. An * is automatically appended to your search string. For example, searching for `bob jo` finds items with *Bob Jones* and *Bob Johnson*, and searching for `jo?n` finds items with *john* and *joan*. You can't use operators to refine results in sidebar search.

See Also:

Search Overview

Changing Sidebar Search Options

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

Refine your search results by:

Choosing which objects to search

If the sidebar search drop-down list is available, you can limit your search to a single object. In the drop-down list, select the object you want. Select **Search All** to search across all objects.

Note: When all objects are selected, the search results don't return article, article management, content, document, product, and solution records. You can search for these records on their respective tabs.

Searching only items you own

If the `Limit to items I own` checkbox is available, you can search only items you own, including case comments and reports that you created.

Note: When `Limit to items I own` is selected, the search results don't return asset, idea, invoice, order, question, quote, reply, and user records because these records don't have owners.

Searching within a division

If you have the "Affected by Divisions" permission, specify which divisions you want to search. If your organization uses divisions but you don't have the "Affected by Divisions" permission, your search results include records in all divisions.

If you restrict your search options, the options you select appear under the search box on the Search Results page.

Using the Recycle Bin

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

User Permissions Needed	
To view and recover your deleted records:	"Read" on the records in the Recycle Bin
To view and recover records deleted by other users:	"Modify All Data"
To recover deleted public tags:	"Tag Manager"
To purge the Recycle Bin:	"Modify All Data"

The **Recycle Bin** link in the sidebar lets you view and restore recently deleted records for 15 days before they are permanently deleted. Your Recycle Bin record limit is 25 times the Megabytes (MBs) in your storage. For example, if your organization has 1 GB of storage then your limit is 25 times 1000 MB or 25,000 records. If your organization reaches its Recycle Bin limit, Salesforce automatically removes the oldest records if they have been in the Recycle Bin for at least two hours.

Viewing Items in the Recycle Bin

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

Searching for Items in the Recycle Bin

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

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

3. Click **Search**.

Restoring Items in the Recycle Bin

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

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

- Parent accounts (as specified in the `Parent Account` field on an account)
- Parent cases (as specified in the `Parent Case` field on a case)
- Master solutions for translated solutions (as specified in the `Master Solution` field on a solution)

- Managers of contacts (as specified in the `Reports To` field on a contact)
- Products related to assets (as specified in the `Product` field on an asset)
- Opportunities related to quotes (as specified in the `Opportunity` field on a quote)
- All custom lookup relationships
- Relationship group members on accounts and relationship groups, with some exceptions
- Tags
- An article's categories, publication state, and assignments

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

Purging the Recycle Bin

To permanently remove your deleted items prior to the 15 day period, administrators, and users with the “Modify All Data” permission, can click **Empty your Recycle Bin** or **Empty your organization’s Recycle Bin** .

See Also:

Deleting Records

ADVANCED SEARCH

How Advanced Search Works

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

How your advanced search works depends on your search options, search terms, and the use of wildcards and operators.

Search Options

Advanced search searches more record types and fields than sidebar search, including attachments, custom fields, and long text fields such as descriptions, notes, and task and event comments.

Select `Limit to items I own`, if available, to limit your search to records you own, including case comments and reports that you created. Click **Advanced Search...** and choose one or more objects by which to limit your search. You can also restrict your search to divisions, if your organization uses them.

Search Terms

Search terms are treated as separate words and may be found in different searchable fields within a record. For example, searching for `bob jones` returns items with *Bob Jones*, as well as a contact named *Bob Smith* whose email address is *bsmith@jones.com*.

Search terms are separated by letter, number, and punctuation boundaries. For example, searching for `acct!4` returns items with *Acct*, *!*, and *4*, even if those terms are in separate places in the item.

Wildcards and Operators

You can use the * (asterisk) and ? (question mark) wildcards to refine results. Use * to match one or more characters, or ? to match a single character. For example, searching for `bob jo*` finds items with *Bob Jones* and *Bob Johnson*, and searching for `jo?n` finds items with *john* and *joan*. You can also use the AND, OR, AND NOT, ( ) (parentheses), and " " (quotation marks) operators to refine results.

See Also:

Search Overview

Changing Advanced Search Scope

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

1. Click **Advanced Search...** in the sidebar.
2. Refine your search results by:

   Searching only items you own

   In the Advanced Options section, select `Limit to items I own`, if available.

   Note: When `Limit to items I own` is selected, the search results don't return asset, idea, invoice, order, question, quote, reply, and user records because these records don't have owners.

   Searching for an exact phrase

   In the Advanced Options section, select `Exact phrase`. This is the same as using quotation marks around your search string.

   Searching within a division

   If you have the "Affected by Divisions" permission, specify which divisions you want to search. If your organization uses divisions but you don't have the "Affected by Divisions" permission, your search results include records in all divisions.

   Choosing which objects to search

   In the Scope section, select the objects for which you want to return search results. If you don't select any objects, your search returns all possible objects. Click **Select All** or **Deselect All** to quickly select all or no objects.

   Note: When all objects are selected, the search results don't return article, article management, content, document, product, and solution records. You can search for these records on their respective tabs.

3. Click **Search**.

   If you restrict your search scope, the scope you select appears under the search box on the Advanced Search Results page. Click **Advanced Search** under the search box to change your search scope again.

Sidebar and Advanced Search Results

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

Your search results include related lists for items and tags that you have permission to view.

From this page you can:

- Click a related list item at the top of the page to jump directly to an object's results.

  Objects with results are displayed in alphabetical order. The number of results for each object is displayed. For example, Contacts [25+] means there are more than 25 contacts that match your search criteria. If your search returns a large number of results for a particular object, click **Next Page** or **Previous Page** to view the results.
- Click a result to open it or click **Edit**, if available.
- Click **My Columns** (or, if you're an administrator, click **Customize...** > **My Columns**) to customize columns in your search results.
- Click **Show Filters**, if available, to filter your search results.
- Click **Advanced Search...**, if available, to refine your search.

GLOBAL SEARCH

How Global Search Works

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

Global search searches more record types, including articles, documents, products, solutions, and Chatter feeds, files, groups, topics, and people. Global search also searches more field types, including custom fields and long text fields such as descriptions, notes, and task and event comments. 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. If global search doesn't have enough information about which objects you use, you see results for all objects until it has more information.

How your global search works depends on your search options, search terms, and the use of wildcards and operators.

Search Options

Search options let you restrict your search to the records you own, if available; to exact phrase searches; and to divisions, if your organization uses them.

The search options you select are saved until you change them.

Note: Chatter feed searches aren't affected by your search scope; Chatter feed search results include matches across all objects.

Search options aren't available to Chatter Free users.

Search Terms

Search terms are treated as separate words and may be found in different searchable fields within a record. For example, searching for `bob jones` returns items with *Bob Jones*, as well as a contact named *Bob Smith* whose email address is *bsmith@jones.com*.

Search terms are separated by letter, number, and punctuation boundaries. For example, searching for `acct!4` returns items with *Acct*, *!*, and *4*, even if those terms are in separate places in the item.

Tip: If you'd like to conduct a phrase search to match multiple terms in the exact sequence that they appear, select `Exact phrase` in the Options or use quotations marks around your search terms.

Wildcards and Operators

You can use the * (asterisk) and ? (question mark) wildcards to refine results. Use * to match one or more characters, or ? to match a single character. For example, searching for `bob jo*` finds items with *Bob Jones* and *Bob Johnson*, and searching for `jo?n` finds items with *john* and *joan*. You can also use the AND, OR, AND NOT, ( ) (parentheses), and " " (quotation marks) operators to refine results.

See Also:

Search Overview

Changing Global Search Options

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

1. Click **Options...** next to the search box in the results page.

   Search options aren't available to Chatter Free users.
2. Refine your search results by:
   - Selecting `Limit to items I own`, if available.

     Note: When `Limit to items I own` is selected, the search results don't return article, asset, idea, invoice, order, people, product, question, quote, and reply records because these records don't have owners.
   - Selecting `Exact phrase`. This is the same as using quotation marks around your search string.
   - Searching within a division. If you have the “Affected by Divisions” permission, specify which divisions you want to search. If your organization uses divisions but you don't have the “Affected by Divisions” permission, your search results include records in all divisions.
3. Click **Save & Search**.

   The search options you select are saved until you change them.

Note: Chatter feed searches aren't affected by your search scope; Chatter feed search results include matches across all objects.

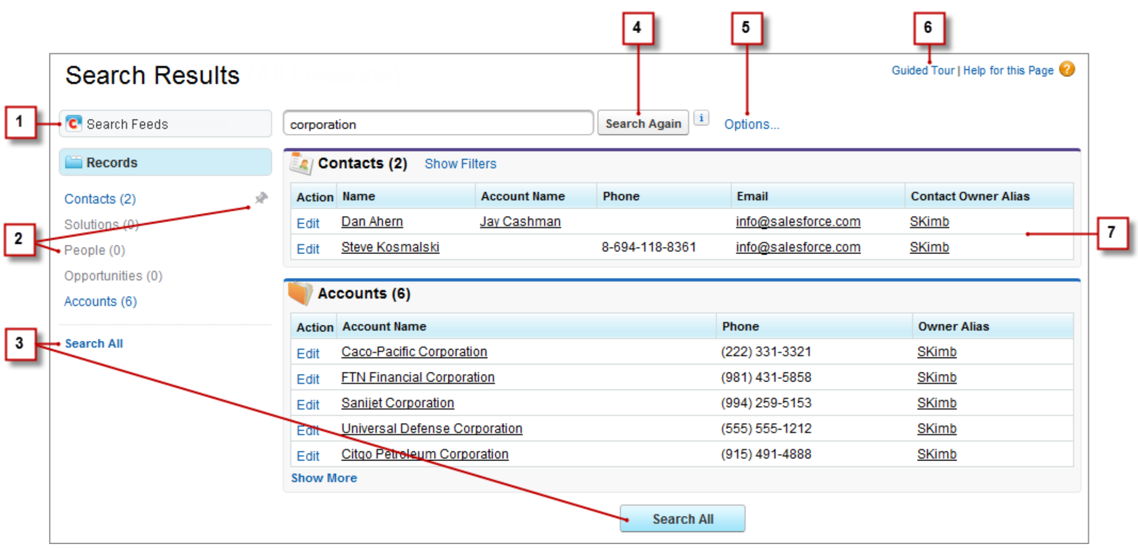
Global Search Results

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

Watch a Demo: Using Smart Search (2:12 minutes)

Your search results include items and tags that you have permission to view. 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. If global search doesn't have enough information about which objects you use, you see results for all objects until it has more information.

Custom object records appear in search results only if they have a custom tab. If your Salesforce administrator has enabled and defined external objects that access SharePoint in your company, your search results may include matches for items in the SharePoint server.



From this page you can:

1. Click **Search Feeds** at the top left of the page to see Chatter posts and comments that include your search terms.

   Tip: On the search results page for feeds, save the feed search to your favorites on the Chatter page by clicking **Add to Favorites**.

2. Quickly see which items (ordered by most frequent use) were searched.
   - Click any item to see only that item's results.

- Hover over and pin important items to the top of your results to manually change the order. You can always unpin them later.

3. Click **Search All** at the bottom of the left side or under the related lists to do a one-time search across all items using your current search terms.

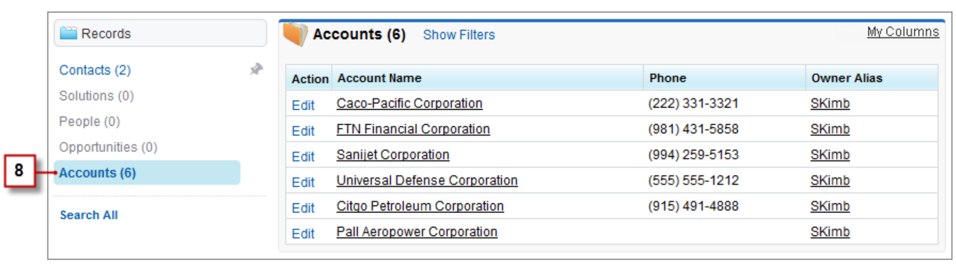
   After clicking **Search All**, you can pin items that don't appear in your scope to the top of your search results. You can always unpin them later.

4. Use the search box in the page to search within your current view. For example, if you drill down to view Chatter feeds and then decide to search Chatter for something different, enter your new search terms and click **Search Feeds** to search across all Chatter posts and comments.

   Note: Search results for feeds include matches for file or link names shared in posts, but not in comments.

5. Click **Options...** to restrict your search to records you own, if available, to exact phrase searches, and to divisions, if your organization uses them.
6. Take a guided tour of the search results.
7. See up to five results for each item you searched.

   - Click a result to open it or click **Edit**, if available.
   - Click column headings to sort results in ascending or descending order.
   - Click **Show Filters**, if available, to filter your search results.
   - Click **Show More** to drill down to the full list of that item's results.



8. Drill down to a specific item's results, and then:

   - Click **Show Filters**, if available, to filter your search results.
   - Click **My Columns** (or, if you're an administrator, click **Customize...** > **My Columns**) to customize columns in your search results.

Tip: To search the posts and comments in a specific feed, such as on a profile, on a record, or in a group, use the feed search ( ) at the top of the feed.

Lookup Dialog Search

Available in: **All** Editions

Salesforce objects often include *lookup fields* that allow you to associate two records together in a relationship. For example, a contact record includes an `Account` lookup field that represents the relationship between the contact and its associated organization. The object that contains the lookup field is the *source object*, while the object the lookup points to is the *target object*.

Lookup fields appear with the button on record edit pages. Clicking opens a lookup search dialog that allows you to search for the record that should be associated with the one being edited. A *blank lookup* is performed when you click the lookup icon without entering a search term.

Salesforce provides two types of lookups.

Standard Lookups

By default, all lookups behave as standard lookups. When searching for records with a standard lookup, only the fields listed in Searchable Fields in Lookup Searches are queried. Standard lookups return up to 50 records at a time in alphabetical order and don't allow for sorting, filtering, or customizable columns.

Enhanced Lookups

If enabled by your administrator, account, contact, user, and custom object lookups can behave as enhanced lookups. Enhanced lookups update standard lookup fields with the following functionality:

- Enhanced lookup search queries are broken into separate search terms at any split between alphabetic, numeric, and special characters. For example, if you enter `ALL4ONE` in an enhanced lookup field, the resulting query searches for *ALL* and *4* and *ONE*. Consequently, entering `ALL and 4 and ONE` returns matches for *ALL4ONE*. Also, searching for `S&` returns fields containing both *S&* and *&S*.
- Enhanced lookups allow users to sort and filter search results by any field that is available in regular search results. Users can also hide and reorganize the columns that are displayed in the results window.

  Note: In addition to user-controlled filters, administrators can create lookup filters on fields that are in a lookup, master-detail, or hierarchical relationship to limit the valid values in lookup dialog results for the field.

- Enhanced lookups return all records that match your search criteria and allow you to page through large sets of search results.

When you click a standard or enhanced lookup icon before entering anything in the lookup field, a list of all recently used records displays. However, for standard lookups of products and queues, the dialog shows an alphabetical listing of the first 50 records. For standard lookups of campaigns, the dialog shows the first 100 active campaigns. For the asset standard lookup on a case, the dialog shows all the assets tied to the contact on the case, if any. If you click the standard or enhanced lookup icon next to a field that is populated with a string, the string value is used as the search query. For standard or enhanced lookups of users, the dialog shows a list of recently accessed user records from across your organization. If you perform a *blank lookup*—that is, you click the lookup icon without entering a search term—filters only apply to items in the most recently used list. Otherwise, filters apply to both this list and the resulting records of the lookup.

Note: Only active users are searchable, except in the lookup for mass transfers, where inactive users are also searchable.

Lookup Auto-Completion

If enabled by your administrator, both standard lookups and enhanced lookups can display a dynamic list of matching recently used records when a lookup field is edited. This list is restricted to objects of the appropriate type and, with the exception of lookups of users, is populated from recently used items. For example, while editing an Account lookup, you can see recently used accounts with names that match the prefix you have entered. Recently used contacts don't appear in this list.

Lookup auto-completion is subject to the following restrictions:

- You must have recently visited records of the appropriate type for the lookup's auto-completion list to be populated.
- You must be editing the lookup field on a record's edit page.

Hover details are displayed only for lookup fields on object types that are included in lists of recently used records. For example, products aren't included in lists of recently used records, so hover details aren't displayed for a lookup field on products.

Tips for Using Standard and Enhanced Lookups

Consider these tips when using standard and enhanced lookups.

- In standard lookup searches, a wildcard is automatically appended to each of your search terms. For example, a search for `bob jo` is really a search for `bob* jo*` and returns items with *bob jones*, *bobby jones*, or *bob johnson*. You can also explicitly use an asterisk (*) wildcard in your search string.
- For enhanced lookups in particular, the wildcard can't be the first character in the search term or phrase, and search results may include more records than you expect if your search terms contain a combination of letters, numbers, and special characters.
- If you enter a value in the lookup text box and save the record without clicking the lookup icon ( ), Salesforce automatically performs a standard lookup search. If it finds an exact match, it saves that value to the lookup field, even if it finds other partial matches. If it doesn't find an exact match and finds one or more partial matches, Salesforce requires you to select a value from a drop-down list of matches. If no results match the text you entered, an error displays instead.
- To search for contacts, leads, users, or other individuals that include spaces in the `First Name` or `Last Name` fields, enter quotes around the terms.

  For example, to search for *bob von hausen*, enter `"bob von hausen"`.
- In organizations where the Salesforce Customer Portal or partner portal is enabled, you can filter the results that appear on the user lookup dialog by selecting either a queue or group of users from the `Owner` or `Assigned To` drop-down list.
- If your organization uses divisions and you have the "Affected by Divisions" permission, your lookup dialog search results include records in the division you select in the lookup dialog window.

Searchable Fields in Lookup Searches

Available in: **All** editions

The lookup icon, which appears as a magnifying glass next to many fields, opens a dialog that allows you to search for other records. Below is the list of fields that are used for matching when searching in the standard or enhanced lookup dialog.

Type of Record	Fields Searched	Standard Lookups	Enhanced Lookups
Account	Account Name	✓	✓
	Account Name (Local)	✓	✓
	Website		✓
Campaign	Campaign Name	✓	
Case	Case Number	✓	
Community	Community Name	✓	
Contact	First Name	✓	✓
	First Name (Local)	✓	✓
	Last Name	✓	✓
	Last Name (Local)	✓	✓
Contract	Contract Name	✓	
	Contract Number	✓	
Discussion	Title	✓	
Document	Document Name	✓	
	Keywords	✓	
Idea	Title	✓	
Lead	Company	✓	
	Company (Local)	✓	
	Name	✓	
	Name (Local)	✓	
Opportunity	Account Name	✓	
	Opportunity Name	✓	
Product	Product Code	✓	
	Product Name	✓	
Self-Service User	First Name	✓	
	Last Name	✓	
Solution	Solution Title	✓	

Type of Record	Fields Searched	Standard Lookups	Enhanced Lookups

User
Note: Only active users are searchable.
	`First Name`
	`Last Name`
	`Name`
		✓
		✓
		✓
			✓
			✓
			✓

Custom Objects	`Name`	✓	✓

See Also:

Lookup Dialog Search
Searchable Fields by Object

REFINE SEARCH RESULTS

Refining Search Using Operators

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

Operators not available in: **Connect Offline**

Sidebar and standard lookup search don't support the use of operators.

Operators

Operator support is case-insensitive.

Operator	Description
AND	Finds items that match all of the search terms. For example, `acme AND california` finds items with the word *acme* and the word *california*, but not items with only the word *acme*. Using AND is optional in most cases, because searching for `acme california` is the same as searching for `acme AND california`. However, when searching articles, documents, and solutions on their respective tabs, AND must be used because OR is the default operator for these objects on their tabs.
OR	Finds items with at least one of the search terms. For example, `acme OR california` finds items with either *acme* or *california* or both.
AND NOT	Finds items that don't contain the search term. For example, `acme AND NOT california` finds items that have the word *acme* but not the word *california*.

Operator	Description
( ) (parentheses)	Group search terms together. Grouped search terms are evaluated before other search terms in your string. See Search Order on page 129.
" " (quotation marks)	Find an exact phrase. Sidebar search automatically places the quotation mark operators around any search string that you enter. This is the same as selecting `Exact phrase` in advanced search or global search. For example, a search for `"monday meeting"` finds items that contain *monday meeting*, but not items that contain *monday afternoon meeting* or *monday's meeting*. The asterisk (*) and question mark (?) function as wildcards when included in a search phrase that is enclosed in quotation marks or when `Exact phrase` is selected in the search scope.

Search Order

When you combine multiple operators in a search string, they are evaluated in this order:

1. () (parentheses)
2. AND and AND NOT (evaluated from right to left)
3. OR

These examples show how search strings are evaluated:

Searching for...	Is the same as...	Finds items with the words...
`acme AND california AND NOT meeting`	`acme AND (california AND NOT meeting)`	*acme* and *california* but not *meeting*
`acme AND NOT california AND meeting`	`acme AND NOT (california AND meeting)`	*acme* but not with both *california* and *meeting*
`acme AND california OR meeting`	`(acme AND california) OR meeting`	*acme* and *california* and items with the word *meeting*
`acme AND (california OR meeting)`	`acme AND (california OR meeting)`	*acme* and *california* and items with the words *acme* and *meeting*

Refining Search Using Wildcards

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

Wildcards

Wildcard	Description
* (asterisk)	Asterisks match zero or more characters at the middle or end (not the beginning) of your search term. For example, a search for `john*` finds items that start with *john*, such as, *john*, *johnson*, or *johnny*. A search for `mi* meyers` finds items with *mike meyers* or *michael meyers*. If you're using sidebar search, an * is automatically appended to the end of the search string. You can use an * at the beginning of a search term in a standard lookup search.

Wildcard	Description
? (question mark)	Question marks match only one character in the middle or end (not the beginning) of your search term. For example, a search for `jo?n` finds items with the term *john* or *joan* but not *jon* or *johan*. If you're using global search, the ? is removed from the end of your search term and isn't treated as a wildcard. You can't use a ? in a lookup search.

Wildcard Behavior and Limitations

- Wildcards take on the type of the preceding character. For example, `aa*a` matches *aaaa* and *aabcda*, but not *aa2a* or *aa.!//a*, and `p?n` matches *pin* and *pan*, but not *p1n* or *p!n*. Likewise, `1?3` matches *123* and *143*, but not *1a3* or *1b3*.
- You can't search for a ? or * in a search phrase that is enclosed in quotation marks or when **Exact phrase** is selected in the search scope because they function as wildcards. For example, `"my wo?d"` matches *my wood* and *my word*.
- A wildcard (*) is appended at the end of single characters in Chinese, Japanese, Korean, and Thai (CJKT) searches, except in exact phrase searches.
- If you're entering search terms in global search, the search box drop-down list gives you the option to search for your term with an * added to the end. For example, type `jo` in the search box, then select **Search for *jo** (starts with)** to find *joan*, *john*, *johnson*, and other matches that start with *jo*.

Refining Search

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

Improve your search results by:

- Changing search options
  - ◊ Sidebar search
  - ◊ Advanced search
  - ◊ Global search
- Using feed search, if you're trying to find information in a specific feed
- Using wildcards
- Using operators, if you're using advanced search, global search, or feed search

Customizing Search Results Columns

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

For most objects, you can specify the enhanced lookup and search results columns and column order.

1. In the object's search results related list, click **My Columns** (Administrators click **Customize...** > **My Columns**).
2. To choose columns, use **Add** and **Remove**.

   Your administrator determines the available columns in a search layout. If search layouts aren't available for the object, such as articles, dashboards, reports, and tags, you can't customize the columns.

3. To reorder columns, use **Up** and **Down**.
4. Click **Save**.
5. Click column headings to sort the results in ascending or descending order.

   Sorting applies across all search results for a particular object, including those on subsequent pages. You can't click on column headings for multi-select picklist fields because you can't sort the multi-select picklist field type.

Filtering Search Results

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

To restrict search or enhanced lookups results for objects, you can use filters. Your administrator determines the available filter fields in a search layout. If your administrator didn't create a search layout for the object or if search layouts aren't available for the object, such as articles, dashboards, reports, and tags, you can't filter your results.

Filters aren't available in Customer Portals or partner portals.

Filtering Search Results for Most Objects

1. Click **Show Filters** in a search results related list.
2. Enter filter criteria using the following tips and click **Apply Filters**.

   - When filtering search results, the operator is selected automatically based on the field type. The = (equals) operator is used for fields with the following types of fields:

     ◊ Dates
     ◊ Numbers, except auto number or phone fields
     ◊ Record IDs

     All other fields use the contains operator. Auto number and phone fields use the contains operator because they can contain non-numeric characters.

   - Except for number fields, commas are used as OR operators in search results filters. For example, if you enter `acme, california` in the `Account Name` filter field, your results include account names with either *acme* or *california*. For number fields (where a comma can be part of a number) commas aren't treated as OR operators and users must explicitly enter the OR operator.

     Note: Explicitly using the OR operator is only supported in number fields.

   - The criteria you specify are AND based. That is, if you specify more than one criterion, the result includes only records that match all of the criteria. For example, if you enter `acme california` in the `Account Name` filter field, your results include account names with both *acme* and *california*.
   - Any field of type URL is filtered based on the exact value that is entered by the user for that field.

     Tip: We recommend that you don't include `http://` or `https://` in URL filter criteria because you may not get the results that you expect.

     When you enter values in URL fields and save records, Salesforce adds `http://` to any URL that doesn't start with `http://` or `https://`. The added `http://` isn't stored in the database. For example, if you enter `salesforce.com` in the `Website` field and save the record, the `Website` field displays `http://salesforce.com`, but the value stored is salesforce.com. Therefore, if you enter `http://salesforce.com` in the `Website` filter field, your results don't include your record.

- You can enter literal date values such as `YESTERDAY` or `NEXT MONTH`.
- If you perform a *blank lookup*—that is, you click the lookup icon without entering a search term—filters only apply to items in the most recently used list. Otherwise, filters apply to both this list and the resulting records of the lookup.

Clearing and Hiding Filters

Click **Clear Filters** to remove all filters and see unfiltered search results. Click **Hide Filters** to apply the filters but not display them on the page.

Filtering Search Results for Articles, Files, Products, and Solutions

To filter the results for articles, files, and products, and to further filter the results for solutions, click the link in the appropriate results related list. Your search and results automatically appear on the new page. If you filter the solutions results on the Search Results page and then use the link in the appropriate results related list to further filter your results, your filter options aren't applied on the new page.

Using Divisions in Search and List Views

If your organization uses divisions to segment data, you can search and create list views by division.

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

User Permissions Needed	
To search within divisions:	“Affected by Divisions”

Searches

- To search within a division in a lookup dialog, select a division from the drop-down list in the lookup dialog window. Search results will contain records in the selected division.
- To search all records within the current user-selected division, use global search.
- To search within multiple divisions at the same time, use advanced search.

List Views

- To change results displayed in a custom list view, set the Division Name when creating or editing a list view. The current user-level selectable division will not change which results are displayed in your custom list view.
- To find records in a specific division in a list view that does not have the Division Name set, change your user-level selectable division.

- To view records across all divisions, change your user-level selectable division to “—All—” or when creating a custom list view, set Division Name to “—All—”.

See Also:

Changing Your Working Division

TAGS

Tags Overview

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

Tags are words or short phrases that you can associate with most Salesforce records to describe and organize their data in a personalized way. Use tags to group records from various objects by a common theme or use, and then use those tags in search to make finding information fast and intuitive.

For example, if you met a number of contacts and leads at a conference, you might tag them all with the phrase *User Conference 2011*. You could then search for the *User Conference 2011* tag and click that tag in search results to retrieve those records.

Salesforce supports two types of tags.

- *Personal tags* are private. Only you can view any personal tags that you add to a record.
- *Public tags* are shared among all users in an organization. Any user with access to the record can view the public tags that you add.

Administrators can enable personal and public 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), allowing you to:

- Tag records
- Remove tags from a record
- Browse, search, and manage tags

Tagging Records

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

User Permissions Needed	
To edit tags on a record:	“Read” on the record
To rename or delete public tags:	“Tag Manager”

1. On the top right corner of the record detail page, click **Add Tags**. If the record already has associated tags, click **Edit Tags**.
2. In the `Personal Tags` or `Public Tags` text boxes, enter comma-separated lists of the tags that you want to associate with the record. Tags can only contain letters, numbers, spaces, dashes, and underscores, and must contain at least one letter or number.

   As you enter new tags, up to 10 tags that have already been defined are displayed as auto-complete suggestions. As you type, the list of suggestions changes to show only those tags that match the prefix you have entered. To choose a suggestion, click it or use your keyboard arrow keys to select it and press the TAB or ENTER key.
3. Click **Save**.

   Tip: When you create or edit tags, you can press the ENTER key to save your changes or the ESC key to discard them.

Note: There are limits on the number of personal and public tags you can create and apply to records. For all editions, if you attempt to tag a record with a new tag that exceeds one or more of these limits, the tag isn't saved. If you reach a limit, you can go to the Tags page and delete infrequently used tags.

See Also:

Tags Overview

Removing Tags from Records

Removing Tags from Records

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

User Permissions Needed	
To edit tags on a record:	“Read” on the record

1. On the top right corner of the record detail page, click **Edit Tags**.

2. Next to the `Personal Tags` or `Public Tags` text boxes, click **[X]** next to the tag that you want to remove.
3. Click **Save**.

Tip: When you create or edit tags, you can press the ENTER key to save your changes or the ESC key to discard them.

If the tag that you removed is the last instance of the tag, the tag is deleted from your organization completely. If other records use the tag, the tag still appears in search results and the Tags page.

Browsing, Searching, and Managing Tags

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

User Permissions Needed	
To rename or delete public tags:	“Tag Manager”

To access the Tags page, click the name of any tag on a detail page, or if your administrator added tags to the sidebar, click **Tags** in the sidebar.

From this page, you can:

- View and browse tags
- Find records with tags
- Search tags
- Rename and delete tags
- Review personal tag statistics

Viewing and Browsing Tags

Use the `Personal Tags` and `Public Tags` checkboxes to limit or expand your view. Because personal tags are private, you can only see the personal tags that you have defined. You can see all public tags that are defined in your organization.

Click a letter at the top of the tag browsing area to view only tags that begin with that letter or click **Next Page** or **Previous Page**.

By default, tags are listed in alphabetical order. From the `Sort` picklist, choose **By Number of Uses** to sort tags by the number of records that are tagged by them, or choose **By Most Recently Used** to sort tags by how recently they were added to a record.

Finding Records with Tags

Click a tag to see the list of records organized by object. The number of records associated with the tag is displayed next to the tag. You can narrow your results further by clicking additional tags. When more than one tag is selected, only records that match all selected tags are displayed in the list of results. Click **[X]** next to a tag to deselect it and remove it from the filter. Click **Clear Selected Tag(s)** to deselect all tags and start over.

Note:

- The number of records associated with a tag can sometimes be greater than the number of records displayed when you click that tag in the Tags page. This situation occurs if you tagged a record and then lost permission to view it because of a change in sharing, or if a record that you don't have access to has one or more public tags.
- Search results and the Tags page don't display custom objects that don't have an associated tab, even if tags are enabled for the custom object.

You can customize columns and filter the search results. See Search Results.

Searching Tags

Enter terms in the Search Tags text box and click **Search**. Only tags that meet your search criteria are listed in the tag browsing area. You can then click any tag to view records associated with that tag.

Search strings must include at least two characters and can include wildcards and operators.

The most recent search result is saved in the tag browsing area next to the alphabet at the top of the page. Click the search string to return to your results.

Renaming and Deleting Tags

- To rename a tag, hover over the tag and select **Rename** from the drop-down list that appears around the tag. Enter a new name for the tag in the text box that appears and click **Save**.
- To delete a tag, hover over the tag and select **Delete** from the drop-down list that appears around the tag. The tag is removed from every record in your organization and is placed in the Recycle Bin.

  If you restore a tag from the Recycle Bin, it is automatically reassociated with the records from which it was removed. For more information, see Using the Recycle Bin on page 118.

You can rename or delete any personal tag, but you must have the “Tag Manager” permission to rename or delete a public tag.

Reviewing Personal Tag Statistics

Click **Personal Tag Usage** on the right side. This page displays your current number of unique personal tags and personal tag applications. You can have a maximum of:

- 500 unique personal tags
- 5,000 instances of personal tags applied to records

If you are approaching your personal tag limits, consider merging similar tags into a single tag by renaming. For example, if you have tags for Bicycling, Cycling, and Biking, you can rename Cycling and Biking to Bicycling to reduce your number of unique personal tags.

To reduce the number of instances of tags applied to records, delete personal tags that you no longer use.

Viewing Recently Used Tags

The **Tags** link and Recent Tags drop-down list, available in the sidebar, allow you to browse tags and access your most recently used tags, respectively.

- Click **Tags** to browse, search, and manage your entire tag collection.

- Select a tag in the Recent Tags drop-down list to view all records that have been marked with that tag. The tags that appear in this list are those you have most recently used to tag records.

SEARCH FAQ

Why does the same search by different users return different results?

The reason two users may not have the same results for the same search is because each search is configured for the specific user. For example, if a user has recently viewed a record, that past viewing increases the relevancy of that record and moves it higher in the list of search results. Records also become more relevant if they are owned by the user performing the search, or if they are used frequently by other members of the organization.

COLLABORATE WITHIN SALESFORCE

Editing Chatter Contact Information

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

Your contact information is visible to all users in your Chatter organization. You can change this information at any time by viewing your profile on the Profile tab or by clicking ***Your Name*** > **My Profile** at the top of any page. Click in the Contact or About Me sections to edit your contact information.

If your organization has enabled Communities, you can control the visibility of your contact information within communities on a field-by-field basis. In the global header, click ***Your Name*** > **Edit Contact Info** to edit your contact information and visibility settings.

You can change the following fields (in alphabetical order):

Field	Description
City	City portion of user's address. Up to 40 characters are allowed in this field.
Country	Country portion of user's address. Up to 80 characters are allowed in this field.
Email	Email address of user. Must be a valid email address in the form: jsmith@acme.com. Up to 80 characters are allowed in this field.
Fax	Fax number for user.
First Name	First name of user, as displayed on the user edit page. Up to 40 characters are allowed in this field.

Field	Description
`Last Name`	Last name of user, as displayed on the user edit page. Up to 80 characters are allowed inthis field.
`Manager`	Indicates the user's manager. This field can only be set by an administrator.
`Mobile Phone`	Cellular or mobile phone number. Up to 40 characters are allowed in this field.
`State/Province`	State or province portion of user's address. Up to 80 characters are allowed in this field.
`Street Address`	Street address for user. Up to 255 characters are allowed in this field.
`Title`	Job title of user. Up to 80 characters are allowed in this field.
`Work Phone`	The user's work phone number. Up to 80 characters are allowed in this field.
`Zip/Postal Code`	Zip code or postal code portion of user's address. Up to 20 characters are allowed in this field.

See Also:

Uploading Chatter Group and Profile Photos

Uploading Chatter Group and Profile Photos

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

Upload a photo to your profile so people can see who you are, or upload a photo for Chatter groups that you own or manage.

1. View your profile or a group:
   - View your profile by clicking ***Your Name*** > **My Profile** at the top of any page or by clicking the Profile tab.
   - View a group by clicking a group name in a feed, on the Groups tab, or in the Groups list on someone's profile.
2. Hover over the stock photo and click **Add Photo**, or if you previously added a photo, click **Update**.
3. Click **Browse...**.
4. Select a file to upload and click **Open**.

   Note: Photos can be .jpg, .gif, or .png format up to 8 MB.

5. Drag the dotted lines in the photo to create a thumbnail image that displays next to your name or the group's name around the application.
6. If the photo is for your profile and you're a member of any communities, you can select `Show in communities with publicly accessible pages`. This makes the photo visible to guest users viewing publicly accessible sites or pages that don't require login.
7. Click **Save**.

To delete a photo, hover over the photo and click **Delete**, then click **OK**.

Following People

Follow people to see updates in your Chatter feed, including posts, comments, and likes.

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

Note: When your administrator turns on Chatter, you automatically follow some users and records in your organization.

Click **Follow** to follow a person wherever you see the person's name in Chatter, for example on the:

- Person's profile page
- People list view
- Person's hover
- Recommendations list
- Followers and Following lists

Once you follow people, you see their posts, comments, and likes in your Chatter feed. You can follow a maximum of 500 people and records.

To stop following a person, hover over the person's name and click next to Following. When you stop following a person, you don't see future updates from that person in your Chatter feed.

See Also:

Following Records

Following Records

Follow records so you can see updates in your Chatter feed, including field changes, posts, tasks, and comments on records.

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

User Permissions Needed	
To view a record:	"Read" on the record

The field changes you see in your feed are determined by the fields your administrator configured for feed tracking. Updates to encrypted custom fields don't display in feeds.

Note: When your administrator turns on Chatter, you automatically follow some users and records in your organization.

Click **Follow** on a

- Record detail page, in the record feed above the Followers list
- Salesforce Knowledge article, next to the record
- Person's Following list, next to the record

When you follow a record, you see updates to the record in your Chatter feed.

To stop following a record, click on the record detail page or on the record's hover. After you stop following a record, you don't see future updates to the record in your Chatter feed.

Consider these tips when following records in Chatter:

- You don't automatically follow records you create. To automatically follow records you create, from your Chatter settings, click **My Feeds** and select **Automatically follow records I create**. However, you don't auto-follow events, tasks, or dashboards in Chatter after you create them.
- When you create person accounts, you can only auto-follow the account fields, not the contact fields.
- You can follow a maximum of 500 people and records.

See Also:

Following People

Joining or Leaving Chatter Groups

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

To join a Chatter group:

- For public groups, click **Join** on a group detail page, in the **Groups** list on the Chatter tab, or on a group hover.
- For private groups, click **Ask to Join** on a group detail page, in the **Groups** list on the Chatter tab, or on a group hover. An email is sent to the group's owner and managers, who can accept or decline your request. Users with the "Modify All Data" permission can directly join private groups, and therefore see **Join** for private groups.

You can join up to 100 groups. Requests to join private groups count toward this limit. For example, if you're a member of 90 groups, you can only request to join 10 more groups.

To leave a public or private Chatter group, go to the **Groups** list on the Chatter tab or a group detail page and click . Clicking also withdraws a request to join a private group.

Searching in Chatter

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

Watch a Demo: Using Smart Search (2:12 minutes)

To find feeds, people, groups, topics, and files across Chatter:

1. Enter your search terms in the header search box.
2. Click **Search**.
3. From the search results, click an item to open it or click **Edit**, if available.

   Click **Search Feeds** at the top of the page to view Chatter feed search results that include your search terms. Click **Records** to return to Chatter people, groups, topics, and files search results.

You can also fine tune your feed searches in the following ways:

- Search the posts and comments in a specific group, profile, record, or other Chatter feeds by using the feed search ( ) in that context.
- Search for hashtag topics by entering `#` followed by the topic (such as `#SalesReport`) in the header search box. Search results return feed items that contain your search terms. To search for hashtag topics with multiple words, use brackets after the hashtag and around the words. For example, to find all instances of #Universal Paper, type `#[universal paper]` in the search box.
- Search for mentions by entering `@` followed by a person's name (such as `@Madison Rigsby`) in the header search box. In the search results, click **Search Feeds** to see where Madison Rigsby is mentioned in Chatter posts and comments.

USE SALESFORCE ON MOBILE DEVICES

GET STARTED WITH SALESFORCE TOUCH

Salesforce Touch Overview

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

Salesforce Platform licenses are also supported.

Salesforce Touch is a version of Salesforce that's designed specifically for touchscreen mobile devices. Using Salesforce Touch, you have real-time access to the same information that you see in the office, but organized for working while on the go.

Salesforce Touch provides these benefits over using the full Salesforce site on your mobile device:

- An intuitive interface that is optimized for easy navigation and data interaction on a touchscreen, so you can scroll, tap, and swipe through records to quickly find the information you need
- Automatic updates and enhancements, so you're always using the most current version
- Support for many of your organization's Salesforce customizations

There are several versions of Salesforce Touch.

- A downloadable app that's available from the Apple® App Store or AppExchange Mobile and installs directly on touchscreen mobile devices. In this release, the downloadable app is available for Apple iPad® and iPhone® devices.

- A mobile browser app that runs in the Safari® web browser on iPad and iPhone devices.

The downloadable app offers the convenience and time savings of maintaining your Salesforce session, so you don't need to log in every time you access Salesforce Touch. Use the mobile browser version if you don't want to bother with installing an app on your device.

Note:

This release of Salesforce Touch doesn't have all of the functionality of the full Salesforce site. See Available Data in Salesforce Touch.

Requirements for Using Salesforce Touch

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

Salesforce Platform licenses are also supported.

These are the requirements for using the downloadable and mobile browser versions of Salesforce Touch.

App Version:

Only v1.1 or later downloadable apps are supported.

No version restrictions exist for the mobile browser app.

Devices:

Apple iPad® 2 and later models (including the iPad mini), with iOS® 6 or later.

Apple iPhone® 4 and later models, with iOS 6 or later.

Browsers:

The default Apple browser, Safari®.

Private Browsing must be turned off. Tap the iPad or iPhone **Settings** icon, then select **Safari** and set `Private Browsing` to **Off**.

Salesforce:

Salesforce Touch is available in Contact Manager, Group, Professional, Enterprise, Unlimited, and Developer Editions. Salesforce Platform licenses are also supported.

You must have an active Salesforce account with access to accounts and contacts.

Chatter customers and partner portal users aren't able to use Salesforce Touch.

Wireless Connection:

A Wi-Fi® or cellular network connection is required to communicate with Salesforce. For the best performance, we recommend using Wi-Fi. If you use Salesforce Touch on a 3G cellular network, data rates may apply and you may incur roaming charges while traveling.

Salesforce Touch includes offline support, so you can view recently accessed records when you don't have a connection. This feature is available through a pilot program—contact salesforce.com to have it enabled.

Locales and Languages:

Salesforce Touch works with almost all Salesforce-supported locales and the fully-supported and end user languages. The exception is right-to-left locales and languages (including Arabic and Hebrew), which aren't currently supported.

Advanced currency management isn't supported in this release.

See Also:

Salesforce Mobile Products Overview
Salesforce Touch Overview

Available Data in Salesforce Touch

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

Salesforce Platform licenses are also supported.

Salesforce Touch doesn't have all of the functionality of the full Salesforce site. You can access all of your standard and custom apps. Not all of the standard Salesforce objects, however, are supported in this release. You can work with these tabs in both the mobile browser and downloadable versions of Salesforce Touch:

- Accounts and Person Accounts
- Campaigns
- Cases
- Contacts
- Contracts
- Dashboards
- Leads
- Live Chat Transcripts
- Opportunities
- Tasks
- All custom tabs

Additionally, you can:

- View events that are accessible from Open Activities or Activity History related lists
- Monitor Twitter profiles that you've associated with your contact records
- See many of the related lists for supported objects
- View User record details
- Access your Chatter data, including people, groups, and feeds
- Access Salesforce Communities (from the My Salesforce pane in the navigation view)

With some exceptions, all of the standard and custom fields for supported objects are available.

The Salesforce Touch interface includes links to the full site, where you can do tasks not currently available in Salesforce Touch. These links are provided as a convenience but using the full site from Salesforce Touch isn't officially supported.

Accessing Salesforce Touch

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

Salesforce Platform licenses are also supported.

The way you access Salesforce Touch depends on the version that you want to use: the downloadable app or the mobile browser app.

Note: Contact your Salesforce administrator to see which versions of Salesforce Touch are available for your organization. By default, the downloadable app is the only version that's automatically enabled but your administrator may have modified access so that the mobile browser app is turned on instead of—or in addition to—the downloadable app.

Accessing the Downloadable App

Currently, the Salesforce Touch downloadable app is available for iPad and iPhone devices. You can download and install the app from the Apple App Store or AppExchange Mobile.

Once the app is installed, launch it from your Home screen and log in to your Salesforce account. By default, you're connected to your production environment.

Note:

If you have trouble logging in to Salesforce from the downloadable app, contact your administrator to see if the app is disabled for your organization.

Using the downloadable app, your Salesforce Touch session persists until you specifically log out, so you won't be prompted to sign in again after periods of inactivity. The downloadable app also saves you time by remembering what you were working on, so you can switch away to do other tasks then pick up exactly where you left off whenever you're ready.

Accessing the Mobile Browser App

The Salesforce Touch mobile browser app is available for iPad and iPhone devices. If the mobile browser version of Salesforce Touch is enabled for your organization, you're automatically redirected to Salesforce Touch when you log in to Salesforce from your Safari mobile web browser.

If Salesforce Touch doesn't automatically start for you, make sure that you didn't turn off the redirection to the mobile browser app. See Turning the Salesforce Touch Mobile Browser App Off or On on page 145 for more information.

See Also:

Salesforce Mobile Products Overview

Salesforce Touch Overview

Using Salesforce Touch

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

Salesforce Platform licenses are also supported.

To learn about using Salesforce Touch, see the *Salesforce Touch FAQ* that's available in the app, on the My Salesforce pane in the navigation view.

See Also:

Salesforce Mobile Products Overview
Salesforce Touch Overview

Turning the Salesforce Touch Mobile Browser App Off or On

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

Salesforce Platform licenses are also supported.

If you prefer to access the full Salesforce site from the Safari browser on your iPad or iPhone device, you can turn off automatic redirection to the Salesforce Touch mobile browser app—either from your mobile device or from the full site. You can quickly re-enable the mobile browser app anytime from the full site.

Note:

If you disable automatic redirection to Salesforce Touch, you can't access the mobile browser app from any of your mobile devices. For example, if you turn off the mobile browser app from your iPad, you won't be able to use the mobile browser app on your iPhone either (assuming Salesforce Touch for touchscreen phones is enabled for your organization).

These steps don't affect the Salesforce Touch downloadable app, which always displays the Salesforce Touch interface.

To turn off the mobile browser app from your iPad:

1. Log in to Salesforce Touch from Safari.
2. Tap the **Navigation** icon in the toolbar.
3. Traverse the navigation view to the My Salesforce pane.
   - In landscape orientation, if the navigation and detail views display side-by-side, tap on the tab pane.
   - In other cases, tap on the list pane then tap on the tab pane.
4. In the **Settings** menu, tap **Turn off Touch**.

To turn off the mobile browser app from your iPhone:

1. Log in to Salesforce Touch from Safari.
2. Tap the **Navigation** icon in the list pane toolbar to open the tab pane.
3. Tap on the tab pane to view the My Salesforce pane.
4. In the **Settings** menu, tap **Turn off Touch**.

To turn off the mobile browser app from the full Salesforce site:

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
   - If you clicked **Setup**, select **My Personal Information** > **Personal Information**.
   - If you clicked **My Settings**, select **Personal** > **Advanced User Details**.
3. Click **Edit**.
4. Deselect **Touch User**.
5. Click **Save**.

If you change your mind later, you can turn the Salesforce Touch mobile browser app back on. From the full site, repeat the previous steps and select the **Touch User** checkbox.

See Also:

Salesforce Mobile Products Overview
Salesforce Touch Overview

GET STARTED WITH SALESFORCE CLASSIC

Salesforce Classic Overview

Free version available in: **All** editions except **Database.com**
Full version available in: **Unlimited** and **Developer** Editions, and for an additional cost in: **Professional** and **Enterprise** Editions

The Salesforce Classic app provides mobile access to your Salesforce data from Android™, BlackBerry® and iPhone® devices. If you have a license to use the full version of Salesforce Classic, you can view, create, edit, and delete records, keep track of your activities, view your dashboards, run simple reports, and log calls and emails. Any Salesforce user who doesn't have a mobile license can download a free, restricted version of Salesforce Classic. With the free version, you can view, create, edit, and delete only accounts, assets, contacts, leads, opportunities, events, tasks, cases, and solutions. You can also access your dashboards.

Note: Supported features may vary depending on your mobile operating system and device model.

Salesforce Classic stores your Salesforce records in a local database on your mobile device, which means you can use the Salesforce Classic app even when a data connection is unavailable. Salesforce Classic periodically polls Salesforce for new and updated records, saving you from the hassle of manually synchronizing your data.

In the free version of Salesforce Classic, only records you recently accessed in Salesforce automatically synchronize to your device. However, you can search for and download records that are not automatically delivered to your device. Items you download from Salesforce become a permanent part of your mobile data set. In addition to recently accessed records, the default configuration synchronizes activities closed in the past five days and open activities due in the next 30 days.

Check the list of supported mobile devices to see if you can use the Salesforce Classic app on your smartphone.

See Also:

Salesforce Classic Implementation Guide
Salesforce Classic User Guide for BlackBerry
Salesforce Classic User Guide for iPhone

Requirements for Using Salesforce Classic

Free version available in: **All** editions except **Database.com**

Full version available in: **Unlimited** and **Developer** Editions, and for an additional cost in: **Professional** and **Enterprise** Editions

The Salesforce Classic app can run on Android, BlackBerry, and iOS operating systems, and it's supported by virtually all wireless carriers—if the device can establish a data connection to the Internet, it can typically run the mobile app. Verify that your device is supported before installing the mobile app. Recently-released mobile devices may not be immediately supported because every device goes through the official certification and quality assurance process.

Notes About BlackBerry Smartphones

- Even if your device meets the minimum operating system requirement, you can improve its performance by upgrading to the latest supported version of the operating system offered by your mobile carrier.
- Mobile users running versions 4.0 - 4.3 of the BlackBerry operating system can still download and install the Salesforce Classic app; however, the mobile server will detect the older operating system and send version 11.6 of Salesforce Classic, which was the last release that supported BlackBerry operating system versions 4.0 - 4.3. Users on version 11.6 of Salesforce Classic can't use any of the new features included in the current release or future releases.
- Starting in Winter '09, Salesforce Classic no longer officially supports the BlackBerry 8700 series, although the mobile app may continue to run on those device models.
- BlackBerry touchscreen devices use the same Salesforce Classic app as other BlackBerry devices, so some aspects of Salesforce Classic aren't optimized for the touchscreen interface.

Notes About iOS Devices

Use of the Salesforce Classic app for Apple products is subject to certain limitations:

- Third parties (including, but not limited to, Apple Inc. and your network connectivity provider) may at any time restrict, interrupt or prevent use of Salesforce Classic for the iPhone and iPod touch devices, or delete the Salesforce Classic app from iPhone or iPod touch devices, or require salesforce.com to do any of the foregoing, without entitling the customer to any refund, credit or other compensation from such third party or salesforce.com.

- Service level agreements don't apply to the Salesforce Classic for iPhone product. Additional limitations are described in the Order Form Supplement for Salesforce Classic for iPhone, which users are required to accept upon download or installation of the Salesforce Classic for iPhone product.

See Also:

Salesforce Mobile Products Overview
Salesforce Classic Overview

Installing the Salesforce Classic App

Free version available in: **All** editions except **Database.com**

Full version available in: **Unlimited** and **Developer** Editions, and for an additional cost in: **Professional** and **Enterprise** Editions

You can install the Salesforce Classic app on any supported Android, BlackBerry, or iPhone device.

The easiest way to install Salesforce Classic is to visit `http://mobile.salesforce.com` from your mobile device and follow the on-screen instructions.

Or, you can use the installation steps for your type of device:

Android Installation

Salesforce Classic is available for download from Google Play. To access Google Play, your Android device must be connected to the network. You also need a Google account to download applications. If you don't already have a Google account, go to `https://accounts.google.com` and select **Sign up** to set one up.

To install Salesforce Classic from Google Play:

1. From the Apps screen of your Android device, select the Google Play Store.
2. Select the **Search** field, and type `salesforce`.
3. Select Salesforce Classic from the search results.
4. Select **Download**.
5. Tap **Accept and Download** if you agree to the terms.
6. Select **Open** to launch the application.
7. The first time you launch the Salesforce Classic app on your device, you must activate the app for your device by logging in and downloading data. Verify that your phone is connected to a network.
   a. Select **I Accept**.
   b. On the activation screen, enter your Salesforce username and password.
   c. Select **Activate**.

Depending on your organization's setup, you might need to set up a passcode before accessing the app.

BlackBerry Installation

Salesforce Classic is available for download from BlackBerry World. You need a BlackBerry World account to download apps on your BlackBerry, but you can create an account from your device if you don't already have one. To install Salesforce Classic from BlackBerry World:

1. Select the BlackBerry World icon.

   If you can't find the icon on your device, you might need to download BlackBerry World. BlackBerry World can't run on all BlackBerry smartphones, so be sure to review Research in Motion's system requirements before trying to install BlackBerry World on your device.
2. Select the **Search** icon.
3. Enter `salesforce` in the `Search` field.
4. In the search results, select Salesforce Classic.
5. Click **Download**.
6. After the installation completes, select **OK**.
7. When prompted whether to permit the app to access the phone, select **Allow**.
8. When prompted whether to permit the app to access tp.mobile.salesforce.com, select **Yes**.
9. Close BlackBerry World.
10. Select the app icon, which resides on the home page of your device or in the Applications folder. On newer phones, the icon may be in the Downloads folder.
11. The first time you launch the Salesforce Classic app on your device, you must activate the app for your device by logging in and downloading data. Verify that your device is connected to a network.
    a. Read the license agreement and select **I Accept**.
    b. Enter your Salesforce username and password.

       Because many passwords contain special characters that are difficult to enter on the device, the `Show Password` checkbox is selected by default. To protect your password, you can deselect the option.
    c. Select **Activate**.

       After your username and password are confirmed by Salesforce, the data downloads. The initial data download may last a few minutes. Future updates to the data occur automatically.

Depending on your organization's setup, you might need to set up a passcode before accessing the app.

Note:

If you're unable to download the Salesforce Classic app from BlackBerry World, you can install the app over-the-air directly from salesforce.com instead.

iPhone Installation

Salesforce Classic is available for download from Apple's App Store. To use the App Store, your iPhone or iPod touch must be connected to the network. You also need an iTunes™ Store account to download applications. If you don't already have an iTunes Store account, open iTunes on your computer and select **Store** > **Account** to set one up.

To install Salesforce Classic from the App Store:

1. From the Home screen of your iPhone or iPod touch, select the App Store icon.
2. Tap **Search**.
3. Tap within the `Search` field to open the keyboard. Type `salesforce`.
4. Select Salesforce Classic in the list of search results to view information about the application.
5. Tap **Free**, and then tap **Install**.

Note: There's no charge to download the app from the App Store. Enterprise, Professional, Unlimited, and Developer Edition users with mobile licenses run the full version of Salesforce Classic. Any Salesforce user who doesn't have a mobile license can download a free, restricted version of Salesforce Classic.

6. Enter your iTunes Store account and password and tap **OK**.
7. The first time you launch Salesforce Classic, you must activate the app for your device by logging in and downloading data. Verify that your device is connected to a network.
   a. Tap the Salesforce icon on the Home screen.
   b. Tap **I Accept**.
   c. On the activation screen, enter your Salesforce username and password.
   d. Tap **Activate**.

   Warning: If the application closes or the device locks during the activation process, the iPhone operating system pauses the download process but it will resume the next time you open the app.

Depending on your organization's setup, you might need to set up a passcode before accessing the app.

See Also:

Salesforce Classic Implementation Guide
Salesforce Classic User Guide for BlackBerry
Salesforce Classic User Guide for iPhone
Salesforce Mobile Products Overview
Salesforce Classic Overview

Downloading Salesforce Classic Over-the-Air from Salesforce.com

Free version available in: **All** editions except **Database.com**

Full version available in: **Unlimited** and **Developer** Editions, and for an additional cost in: **Professional** and **Enterprise** Editions

The BlackBerry World is the preferred place for downloading the Salesforce Classic app because users are automatically notified as upgrades become available. However, some BlackBerry administrators restrict users from downloading and using the BlackBerry World on their devices. BlackBerry users can install Salesforce Classic over-the-air directly from Salesforce.com if they are unable to access BlackBerry World.

To download Salesforce Classic over-the-air:

1. Point your mobile browser to `mobile.salesforce.com/bb`.
2. Highlight the **Download the application** link and select **Get Link** from the menu.
3. Select **Download**. If prompted to replace an older version of the client application, select **Yes**.

Note: The minimum BlackBerry operating system requirement for the mobile application is 4.3. If you're running versions 4.0–4.3 of the operating system, you can still download and install the mobile application; however, the mobile server will detect the older operating system and send version 11.6 of the mobile application, which was the last release that supported operating system versions 4.0–4.3. You can't use any of the new features included in the current release or future releases until you upgrade to the most recent BlackBerry operating system for your phone.

4. Select **Reboot** to restart your device.
5. When prompted to allow an HTTP connection, select the `tp.mobile.salesforce.com` checkbox. Scroll down and select **Allow this connection**.
6. Select the Salesforce Classic icon, which resides on the home page of your device or in the Applications folder. On newer phones, the icon may be in the Downloads folder.
7. Read the license agreement and select **I Accept**.
8. Enter your Salesforce username and password.

   Because many passwords contain special characters that are difficult to enter on the device, the `Show Password` checkbox is selected by default. To protect your password, you can deselect the option.
9. Select **Activate**.

   After your username and password are confirmed by Salesforce, the data downloads. The initial data download may last a few minutes. Future updates to the data automatically occur behind the scenes.

See Also:
Salesforce Mobile Products Overview
Salesforce Classic Overview

MOBILE FAQ

Using Salesforce Classic FAQ

- Do I need a license to use Salesforce on a mobile device?
- Is my phone compatible with the Salesforce Classic app?
- What Salesforce data is stored on my device when I use the Salesforce Classic app?
- How do I use the Salesforce Classic app to access records that aren't on my mobile device?
- How frequently does the Salesforce Classic app update my data?
- Can I see records in the Salesforce Classic app that I can’t access in Salesforce?
- When I receive a call on my mobile device, will the Salesforce Classic app open the associated contact record?

Do I need a license to use Salesforce on a mobile device?

You need a mobile license to use the full version of Salesforce Classic. Any Salesforce user who doesn't have a mobile license can download a free, restricted version of Salesforce Classic.

With the free version, you can view, create, edit, and delete only accounts, assets, contacts, leads, opportunities, events, tasks, cases, and solutions. You can also access your dashboards.The free version synchronizes records you recently accessed on the Salesforce website, and you can search for records that were not automatically downloaded to your device. Starting with Summer '13, the free version of Salesforce Classic is disabled by default in all new organizations. You can enable it to give users access to Salesforce on their mobile devices.

If you've been assigned a mobile license but your administrator hasn't set up your mobile configuration yet, you can activate Salesforce Classic with the default mobile configuration. The default configuration automatically synchronizes the records you most recently accessed in Salesforce to your mobile device. You can also search for and download any records from Salesforce that aren't available locally on your device.

To find out if your user account has been assigned a mobile license to access the full version of Salesforce Classic, review your personal setup.

- If the **Mobile User** checkbox is selected, you can install and run Salesforce Classic. If the **Mobile User** checkbox is selected but the `Mobile Configuration` field is blank, you can activate Salesforce Classic using the default mobile configuration.
- If the **Mobile User** checkbox isn't selected and you're an Enterprise, Professional, Unlimited, or Developer Edition customer, you may have access to the free version of Salesforce Classic. Ask your administrator whether you have access to the free version of Salesforce Classic.

Note: The `Mobile User` checkbox is disabled by default for new Unlimited Edition users.

Is my phone compatible with the Salesforce Classic app?

The Salesforce Classic app can run on iPhones, iPod touch devices, and most BlackBerry and Android devices. To find out if your phone can run the app, see the list of supported mobile devices.

Note: Supported features may vary depending on your mobile operating system and device model.

What Salesforce data is stored on my device when I use the Salesforce Classic app?

Using the Salesforce Classic app to access Salesforce on a mobile device is much different from using the full Salesforce application on your computer. Mobile devices have a minimal amount of memory and a small screen, and don't always maintain a constant network connection. To work with these limitations, a subset of your Salesforce data is stored in a local database on your phone.

The following types of tabs are available in the Salesforce Classic app:

- All custom object tabs and these standard object tabs:
  - Accounts

- ◊ Assets
- ◊ Attachments
- ◊ Cases
- ◊ Contacts
- ◊ Content
- ◊ Events
- ◊ Leads
- ◊ Notes
- ◊ Opportunities
- ◊ Price Books
- ◊ Products
- ◊ Solutions
- ◊ Tasks
- ◊ Users
- ◊ Dashboards
- ◊ Reports

- Web and Visualforce tabs

Note: The tabs and objects that you see in the app are determined by your mobile configuration and might not include all the tabs and objects listed here.

Additionally, the iPhone and Android apps don't support reports.

When you open the tab for an object, you probably won't see all of your Salesforce records. For each mobilized object, your administrator can create filter criteria to limit the number of records on your device. For example, in a large organization, sending all open and closed opportunities to your mobile device could consume too much memory or potentially crash it. Instead of sending all opportunities, your administrator might send a subset of them, such as open opportunities that you own that are scheduled to close this month.

Can I see records in the Salesforce Classic app that I can't access in Salesforce?

No. User permissions, sharing rules, and field-level security are inherited from Salesforce—the mobile application enforces all the restrictions set up in Salesforce.

How frequently does the Salesforce Classic app update my data?

The Salesforce Classic app checks for data changes every 20 minutes. During this incremental update, the server retrieves any newly created Salesforce records that you own, and then sends that data to your device. It also sends modifications to any records already stored on the device.

Note: Note the following about data synchronization:

- The Android and BlackBerry client apps adjust their data polling time based on app usage. If the app isn't in use, the polling time interval increases in an exponential fashion, until it reaches eight hours. From that point forward,

the device polls for data every eight hours. This prevents the Salesforce Classic app from draining the device battery when the app is rarely used.
- Because only one app can run on the iPhone at a time, the Salesforce Classic app can’t request a data update unless the app is open. When you launch the app on the iPhone, it performs an incremental update unless a data synchronization has occurred in the past 20 minutes.

How do I use the Salesforce Classic app to access records that aren't on my mobile device?

The Salesforce data available on your device is defined by your mobile configuration. You can easily search for records that aren't automatically downloaded to your device. A search box is available on each object tab in the Salesforce Classic app, as well as on the app's home page.

When I receive a call on my mobile device, will the Salesforce Classic app open the associated contact record?

The Salesforce Classic app can’t open a Salesforce contact when you receive incoming calls. However, if you place a call from Salesforce Classic, you’re automatically prompted to log the call.

GET HELP AND USER ASSISTANCE

Using Salesforce Help

All information in the online help applies to **All** Editions, unless otherwise noted.

The Salesforce Help site gives you the information you need to be successful. You can:

- Get Help for What You're Working On
- Find Answers to Your Questions
- Print Help
- Download Tip Sheets and Other Guides
- Review Documentation for Force.com Developers
- Contact Support

Get Help for What You're Working On

On any Salesforce page, click **Help for this Page** to get context-sensitive help for the page. On any related list or overlay, click **Help** to get context-sensitive help.

Find Answers to Your Questions

To get targeted information, enter keywords or a phrase in the Help search box. You'll get a list of matching resources, which you can refine by role, language, application area, or document type: help documentation, knowledge articles from Customer Support, best practices, and training classes. For more information about the Help site's features and content, start with the How to Use Help gadget on the Help site home page.

Print Help

Click **Print this page** from any Help page to print a single page. To print the entire user guide, which is a PDF version of the help documentation, click **Printable User Guide** in the Documentation gadget or from any Help page. Because the user guide is thousands of pages, we recommend you print only a single page or a range of pages.

Download Tip Sheets and Other Guides

You can find tip sheets, user guides, and other resources from the Documentation gadget on the Help site home page.

Review Documentation for Force.com Developers

If you are working with the Force.com platform, you'll find the information you need in the Developer Force Technical Library. You can also access developer documentation from the Documentation gadget on the Help site home page.

Contact Support

Click **Contact Support** on the Help site to choose your support option: talk by phone, chat, open a case, post a question to the Salesforce community, or take another action.

Note: Salesforce.com makes every effort to ensure the accuracy of the information contained within the Help site, but assumes no responsibility or liability for any errors or inaccuracies that may appear. If you do find any errors, please use the feedback form at the bottom of every help page.

See Also:

Understanding Types of Online Help

Getting Assistance While You Work in Salesforce

Understanding Types of Online Help

Available in: **All** Editions

Salesforce offers comprehensive online help for all its products and services. Use the help to find out about new and existing features, and learn how to set them up and use them. The help system offers different types of information, based on your needs.

- *Overview* topics, such as “Quotes Overview,” introduce and help you understand Salesforce features, and tools—and everything you can do with them.
- *Concept* topics, like “Understanding User License Types,” explain the key ideas and terms you'll need to know when using our features and tools.
- *Task* topics tell you how to perform tasks in Salesforce. Some task topics, such as “Setting Up Case Feed,” walk you through complex procedures, and others, such as “Editing Records,” through simple and common tasks.

- *Reference* topics, such as “Account Fields,” give you the details you need to understand fields and options in the features you use.

You can find help on all Salesforce pages. Just click **Help for this Page** to view a topic that explains what you need to know or do in the feature you’re working in. Click the **Help & Training** link on any page to open the main Help page and search for the information you need.

See Also:

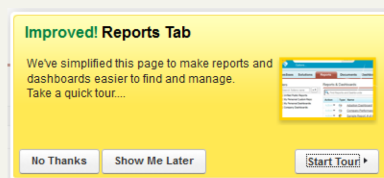
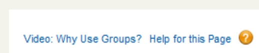
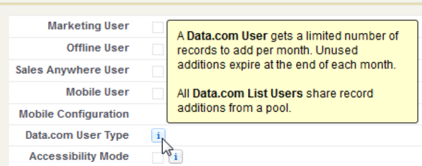
Using Salesforce Help
Getting Assistance While You Work in Salesforce

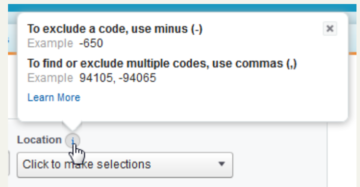
Getting Assistance While You Work in Salesforce

Available in: **All** Editions

Within Salesforce, you’ll find lots of options for getting assistance while you work. For example, when you first start using Forecasts, you’ll want to watch the guided tour, which demonstrates the key parts of the Forecasts user interface. As you gain experience and use features like forecast adjustments, you’ll find information bubbles to help you understand what to do.

It’s a good idea to be on the lookout for the user assistance options we’ve built in to Salesforce. Here are some of the most common user assistance features you'll find.

Type of Assistance	How to Use It	What to Look For
Guided Tour	Guided tours pop up and introduce themselves, then walk you through the parts of a feature’s user interface. If you dismiss a tour without viewing it, look for the **Guided Tour** link, then click it when you’re ready.	
Video	You’ll find helpful videos embedded throughout Salesforce. Some videos pop up automatically to introduce a new feature or tool, or show you how to perform a task. Some videos become available when you enable a feature. Most videos are linked from the Salesforce pages for their features, so you can view them multiple times. You can also find videos linked within the Salesforce help and release notes.	
Info Bubble	Info bubbles provide essential information about fields and options. Just hover over the i icon to view.	

Type of Assistance	How to Use It	What to Look For
Click Tip	Click tips provide examples, suggestions, and links to more information about the feature you're using. Click the icon to view.	

See Also:

Understanding Types of Online Help

Learning About Salesforce Features

In addition to documentation about setting up Salesforce and adding yourself as a user, Salesforce also provides comprehensive documentation for administering and using all its products and features, and extending the Salesforce service with our development tools.

You can find our documentation in both online help and PDF formats. Here's a summary of what you'll find in each set.

Documentation Set / PDF Title	Who should read it?	Description
Learn Salesforce Basics	Users and Administrators	Designed for end users and administrators, this documentation tells how to set yourself up as a Salesforce user. It also explains common terms and concepts, and tells you how to perform common tasks, such as navigating and searching the product. You'll also find *basic* information about Chatter, analytics, Salesforce Mobile, and more. *Detailed* information about these products and features can be found in the other documentation sets described here.
Set Up and Maintain Your Salesforce Organization	Administrators	Designed for administrators, (users assigned to the Administrator profile), this documentation tells how to set up your online Salesforce organization and configure it for your company's needs. It also guides you through ongoing maintenance.
Set up and Maintain Sales Tools	Administrators	Designed for administrators, this documentation tells how to set up and configure CRM features, so your users can become successful selling to their customers using Salesforce. This documentation does not include

Documentation Set / PDF Title	Who should read it?	Description
		feature-specific concepts. For those, you can refer to *Sell to Your Customers*
Sell to Your Customers	Users and Administrators	Designed for users, this documentation provides the concepts, tasks, and general guidance you need to use Salesforce to sell more successfully to your customers.
Set Up and Maintain Customer Support Tools	Administrators	Designed for administrators, this documentation tells how to set up Salesforce customer service and support features (also known as the Service Cloud).. This documentation does not include feature-specific concepts or overviews. For those, please refer to the user documentation, *Support Your Customers*.
Support Your Customers	Users and Administrators	Designed for support agents and others who want to use Salesforce customer service and support features (also known as the Service Cloud) this documentation gives you the concepts, tasks, and general guidance you need to useSalesforce to provide customer service.
Analyze Your Salesforce Data	Users and Administrators	Designed for both users and administrators, this documentation tells how to create, run, share, and maintain Salesforce reports and dashboards.
Set up and Maintain Collaboration Tools	Administrators	Designed for administrators, this documentation contains everything you need to help your users collaborate with each other, or even with people outside your organization. Learn how to set up and extend Chatter, or enable users to create, package and send files outside your organization using Salesforce CRM Content. For information on using collaboration tools, see the user documentation *Collaborate with everyone*
Collaborate with Everyone	Users and Administrators	Designed for both users and administrators, this documentation tells how to complete tasks quickly and efficiently by collaborating with people either inside or outside of your Salesforce organization. Refer to this documentation for information on collaboration tools like Chatter, Salesforce CRM Content, and even documents.

Documentation Set / PDF Title	Who should read it?	Description
Enhance Salesforce with Point and Click Tools	Administrators and Developers	Designed for administrators and developers, this documentation takes you beyond the basics of Salesforce administration and tells how to enhance your objects, data, and fields, customize your organization's look and feel, augment your business processes, create websites, and even create apps—all using point-and-click tools.
Enhance Salesforce with Code	Developers	Designed for developers, this documentation tells you how to enhance your Salesforce organization by developing custom applications and integrating external applications.
Package and Distribute Your Apps	Developers	Designed for developers, this documentation tells you how to create, package, and distribute apps you build using the Force.com platform, and how to support your app's subscribers.
Salesforce Limits	Users, Administrators, and Developers	This reference documentation identifies limits that may affect your setup, maintenance, and use of Salesforce, as well as how you expand it with point-and-click tools or code.
Salesforce Glossary	Users, Administrators, and Developers	Designed for users, administrators, and developers, this documentation defines names, concepts, and terms that appear throughout the Salesforce user interface and documentation.

Printable Tip Sheets & User Guides

In addition to online help, salesforce.com publishes printable documentation to help you be successful with Salesforce. These documents include tip sheets, user guides, and other resources that describe the features and capabilities of Salesforce. These documents are available as Adobe® PDF files. Adobe Reader® is required to open PDF files; to download the latest version of Reader, go to `www.adobe.com/products/acrobat/readstep2.html`.

This topic lists the PDF files that are available for the following audiences.

- For All Users
- For Sales Professionals
- For Support Professionals
- For Marketing Professionals

- For Administrators

See Also:

Video Demos

For All Users

These documents are for all Salesforce users.

- *How to be Successful with Salesforce*
- *Find the Information You Need*
- *Tips & Hints for Custom Views*
- *Browser Support and Configuration*
- *Salesforce System Requirements*
- *Using Ideas*
- *Tips for Using Content Deliveries*
- *Using Salesforce Group Edition*
- *Chatter Plus Frequently Asked Questions*

Reports and Dashboards

- *Getting Started with Analytics*
- *Analytics Workbook*
- *Using the Reports Tab*
- *Using the Drag-and-Drop Report Builder*
- *Maximizing Report Performance*
- *Report Formula Summary Functions*
- *FAQ: Scheduling Reports*
- *Tips for Creating Dashboards*
- *One Dashboard For Many Viewers*
- *Taking Advantage of Dynamic Dashboards*
- *Sample CRM Dashboards*
- *What are Joined Reports?*
- *Using Cross Filters in Reports*
- *Using Bucket Fields*

For Sales Professionals

The following documents apply to sales professionals:

Account Management

- *Getting Microsoft® Outlook® and Salesforce in Sync*

- *Tips & Hints for Sales Reps*
- *Importing Your Personal Accounts and Contacts*
- *Implementing Data.com Clean*
- *Tips for Using Content Deliveries*
- *Tips for Using HTML Email Templates*
- *Working with Connect for Outlook*
- *Working with Connect for Lotus Notes*
- *Using Force.com Connect for Office*
- *Salesforce Bulk Mail Merge Process*
- *Guidelines for Uploading Mail Merge Templates*
- *Sample Mail Merge Templates* (Zip file)
- *Getting Started with Force.com Connect Offline*
- *Tips & Hints for Working with Territories*
- *Tips & Hints for Person Accounts*

Pipeline Management

- *Forecasts Administrator's Workbook*—For administrators of Collaborative Forecasts.
- *Using Customizable Forecasts*—For users of Customizable Forecasting. For more information, search for "Customizable Forecasting Overview" in the Salesforce online help.
- *Forecasts: Assessing Your Position*—For users of Forecasts (Classic). For more information, search for "Do I have Customizable Forecasting?" in the Salesforce online help.
- *Tips & Hints for Products & Schedules*

Mobile

- *Getting Started with Chatter Mobile*
- *Salesforce Classic Implementation Guide*
- *Salesforce Classic for BlackBerry*
- *Salesforce Classic User Guide for BlackBerry*
- *Salesforce Classic User Guide for iPhone*
- *Salesforce Classic for Windows Mobile*
- *Salesforce Classic User Guide for Windows Mobile*
- *Windows Mobile Peripherals Implementation Guide*

For Support Professionals

These documents are for support professionals.

- *Tips & Hints for Support Reps*
- *Getting Started with your SoftPhone*
- *Using the Console Tab*
- *Tips & Hints for Solutions*
- *Getting to Know Case Feed*
- *Getting to Know Live Agent*

For Marketing Professionals

The following documents apply to marketing professionals:

- *Getting the Most from Your Leads*
- *Five Steps for Managing Campaigns*
- *Tips for Using Content Deliveries*
- *Using Data.com Clean in Salesforce*

For Administrators

The following documents apply to administrators:

Sales Administration

- *Setting Up Shared Calendaring*
- *Deploying Territory Management*
- *Implementing Person Accounts*
- *Forecasts Administrator's Workbook—For Collaborative Forecasts*
- *Setting Up Customizable Forecasting*
- *Customizable Forecasting FAQ*
- *Salesforce Classic Implementation Guide*
- *Salesforce CRM Content Implementation Guide*
- *Administering Salesforce Desktop Clients*
- *Administering Connect for Outlook*
- *Administering Connect for Lotus Notes*
- *Accessing SharePoint Data with Sunlight Search — Beta*
- *Getting Started with Relationship Groups*
- *Getting Started with Assets*
- *Getting Started with Contracts*

Support Administration

- *Setting Up Customer Support*
- *Case Management Implementation Guide*
- *Solutions Implementation Guide*
- *Getting Started with Setting Up Call Centers*
- *Getting the Most from Your Self-Service and Customer Portals*
- *Salesforce Customer Portal Implementation Guide*
- *Chatter Answers Implementation Guide*
- *Service Cloud Console Implementation Guide*
- *Self-Service Portal Implementation Guide*
- *Salesforce CRM Content Implementation Guide*
- *Salesforce Knowledge Implementation Guide*
- *Setting up Salesforce Knowledge*

- *Importing Articles intoSalesforce Knowledge*
- *Answers Implementation Guide*
- *Entitlement Management Implementation Guide*
- *Live Agent Implementation Guide*
- *Setting Up Case Feed*
- *Getting Started with the Ideas Base Theme*

Marketing Administration

- *Tips for Lead Administrators*
- *Salesforce Lead Management Implementation Guide*
- *Campaign Management Implementation Guide*
- *Salesforce Ideas Implementation Guide*

Collaboration Administration

- *Getting Started With Salesforce Communities*
- *Migrating From Portals to Communities*

Salesforce Implementations

- *Salesforce Enterprise Edition Upgrade Guide*
- *Setting Up SalesforceGroup Edition*
- *Salesforce Limits Quick Reference Guide*

Customization

- *Tips & Hints for Record Types*
- *Building Salesforce Custom Links*
- *Tips & Hints for Page Layouts and Field-Level Security*
- *Building Custom Objects, Tabs, and Related Lists*
- *Implementing State and Country Picklists (Beta)*
- *Formulas Quick Reference Guide*
- *Useful Formula Fields*
- *Tips for Reducing Formula Size*
- *Useful Validation Rules*
- *Using Multiple Business Processes*
- *Workflow: Automating The Process*
- *Useful Workflow Rules*
- *Getting Started with Approval Processes*
- *Useful Approval Processes*
- *Email Approval Response*
- *Visual Workflow Implementation Guide*
- *Creating Lookup Filters on Relationship Fields (Beta)*

Security and Data Management

- *Security Implementation Guide*
- *Single Sign-On Implementation Guide*

- *Tips & Hints for Sharing Data*
- *Understanding Defer Sharing Calculations*
- *Managing Data Quality*
- *Implementing Data.com Clean for Accounts, Contacts, and Leads*
- *Importing Your Organization's Accounts and Contacts*
- *Using Mass Delete to Undo Imports*
- *Getting Started with Divisions*
- *Data Loader Guide*
- *Salesforce Field Reference Guide*
- *Resolving Data Conflicts and Errors in Force.com Flex Apps*

Extending Salesforce

- *Developing Packages for Distribution*
- *AppExchange Publishing Guide*
- *Application Installation Guide*
- *Force.com Sites Implementation Guide*
- *OEM User License Comparison*

Globalization

- *Setting Up the Translation Workbench*
- *International Organizations: Using Multiple Currencies*

Video Demos

In addition to online help, salesforce.com creates video demos to help you be successful with Salesforce.

- Chatter
- Sales
- Service
- Analytics
- Data.com
- Force.com
- Site.com
- Security
- Data Import

Chatter

Video Title	For End Users	For Administrators
Setting Up Your Salesforce Community (5:59 minutes)		✓

Video Title	For End Users	For Administrators
Learn about basic setup of Salesforce Communities, including creating a community, adding members and tabs, customizing the interface and emails, and previewing and publishing.		
Discover and Organize with Chatter Topics (3:41 minutes) Use Chatter topics to see what people are talking about, organize the conversations you want to be a part of, and discover people and groups that are interested and knowledgeable in the same areas.	✓	
Enhancing Your Chatter Posts (1:10 minutes) Learn how to use @mentions and #topics to enhance your Chatter posts.	✓	
Sending Private Chatter Messages (3:15 minutes) Learn how to communicate privately in Chatter using messages.	✓	
Sharing Files in Chatter (2:45 minutes) Sharing files has never been easier. Learn how to upload and share files at one time, share files with a Chatter message, perform actions from file hovers, and share files with anyone inside or outside of your company by sending them a secure link.	✓	
Using Chatter Groups (2:16 minutes) With Chatter Groups you can invite people outside your company to safely collaborate with you and your group members. Consultants, partners, board members... now you can select anyone to join you on Chatter!	✓	
Using Smart Search (2:12 minutes) Watch this short video to see how you can find what you need quickly and easily, in Salesforce Chatter, using smart search.	✓	
Getting the Most Out of Chatter Feeds (2:32 minutes) Use Salesforce Chatter to create posts, polls, and bookmarks to collaborate effectively with your coworkers in Chatter. You learn how to post to your followers or a group, bookmark a post so you can find it later, and how to create a poll on the fly so you can gather results fast!	✓	
Using Chatter in Apex to Display Two Chatter Feeds in a Visualforce Page (6:00 minutes) Learn how easy it is to use Chatter in Apex to get Chatter feeds for your Salesforce Communities and display them side by side in Salesforce. Use the Developer		

Video Title	For End Users	For Administrators
Console to create an Apex custom controller, a Visualforce custom component, and a Visualforce page.		

Sales

Video Title	For End Users	For Administrators
Splitting Credit across Your Sales Team (1:44 minutes) Learn how to add revenue and overlay splits to opportunities.	✓	
Change Sets Overview (2:30 minutes) Use change sets to easily move configuration settings from one organization to another.		✓
Creating a Criteria-Based Sharing Rule (1:13 minutes) Learn how to create a sharing rule based on a field value in a record.		✓
Editing Role-Based Category Group Visibility (2:00 minutes) Allows certain roles to view information, such as questions in an answers community or articles in a knowledge base, according to specific data categories.		✓
Forecast Accurately With Collaborative Forecasts (4:48 minutes) See how to maneuver around Collaborative Forecasts so that you can reach your sales goals.	✓	
Importing Accounts Using the Data Loader Command Line Interface (5:20 minutes) Learn how to use the Data Loader CLI to import data into Salesforce.		✓
Requesting a Meeting Using Cloud Scheduler (2:37 minutes) Learn how to use Cloud Scheduler to request and schedule meetings with your customers and coworkers.	✓	
Sending Mass Email (4:31 minutes) This demo shows you how to leverage the mass email tool in Salesforce, so you can quickly contact your customers and keep track of these emails within the Salesforce app.	✓	

Video Title	For End Users	For Administrators
Setting Up Data Categories (1:30 minutes) Data categories let you classify your data based on your business needs.		✔
Using Quote Templates (2 minutes) Quote templates let you design, preview, and activate templates for the quote PDFs you send to your customers.	✔	
Entitlements Management Setup (2:46 minutes) Learn how to set up the Entitlement Management feature. Entitlement Management helps your support reps determine which customers are eligible for certain kinds of support. This video covers Entitlement Management Milestones, Entitlement Processes, Entitlements, and Service Contracts.		✔
Salesforce for Outlook Videos		
Getting Ready to Integrate Microsoft® Outlook® and Salesforce (3:00 minutes) If you want to sync contacts, events, and tasks between Microsoft® Outlook® and Salesforce, as well as add emails to Salesforce records, you'll use Salesforce for Outlook. Learn how to download and install it.	✔	
Learning about Sync Directions (2:16 minutes) Learn how to view your sync direction settings in Salesforce for Outlook, and find out whether you have permissions to change them.	✔	
Using Salesforce for Outlook (2:43 minutes) Learn how to easily sync contacts, events, and tasks with Salesforce and add emails to related Salesforce records.	✔	
Using the Salesforce Side Panel to Work with Records in Microsoft® Outlook® (2:18 minutes) Learn how you can work with Salesforce records directly in Outlook. In addition, learn about adding Outlook emails to the Salesforce records of your choice.	✔	
How to Merge Contacts in Salesforce (1:48 minutes) Learn how you can merge duplicate contact records in Salesforce.	✔	

Service

Video Title	For End Users	For Administrators
Encourage Collaboration with Idea Themes (3:30 minutes) Idea Themes lets you invite community members to post ideas about specific topics so that members can solve problems or propose innovations for your company.	✓	
Introducing the Service Cloud Console (2:00 minutes) The Service Cloud console uses tabs to help you find and update records quickly.	✓	
Setting Up a Service Cloud Console (2:20 minutes) How to set up a Service Cloud console for support agents.		✓
Supporting Multiple Languages with Salesforce Knowledge (3:39 minutes) Learn how to translate knowledge base articles with Salesforce Knowledge.		✓

Analytics

Video Title	For End Users	For Administrators
Building Matrix Reports (2:00 minutes) This video shows you how easy it is to create matrix reports using report builder.	✓	
Using Cross Filters in Reports (2:40) Use a cross filter to find just the records you need in a report. Cross filters let you fine-tune your results by including or excluding records from related objects, without having to write formulas or code.	✓	
Getting Started with Buckets (3:00 minutes) Learn how to group your data without having to create custom fields! Buckets help you sort, organize, and understand large amounts of data in Salesforce quickly and easily. Create your own categories on the fly, without formulas or custom fields.	✓	
Getting Started with Report Builder (2:34 minutes) This video introduces you to the report builder, a powerful drag-and-drop interface for building reports.	✓	

Video Title	For End Users	For Administrators
Introducing Joined Reports in Salesforce (3:19 minutes) With joined reports, you create different types of information in a single report. Our example creates open and closed opportunities and active support cases.	✓	
An Overview of Dashboards (3:20 minutes) This demo covers some key dashboard features, such as changing the visual display, changing drill down options, and creating dynamic dashboards, so sales managers and team members can use one dashboard to track their team's or individual performance.	✓	
Tips for Scheduling Reports (2:19 minutes) Learn how to schedule reports with an active running user, send them during off-peak hours without impacting performance, and email them to the right users.		✓
Making Your Reports Run Faster (3:14 minutes) Get tips to make your reports run faster. Learn how to remove unnecessary columns, set the scope for relevant data, and use efficient filters with operators.	✓	

Data.com

Video Title	For End Users	For Administrators
Finding Data.com Accounts and Contacts and Adding Them to Salesforce (3:37 minutes) Learn how to find Data.com accounts and contacts and add them to Salesforce. Check out the Account Card.	✓	
How Do I Set Up Data.com Clean? (4:35 minutes) This video shows Salesforce administrators how to set up and maintain Data.com Clean. It covers the clean features available with the Data.com Corporate and Premium products, plus the additional features available with the Data.com Clean product.		✓
Select a Data.com Match for your Salesforce Account Record (0:47 minutes)		
Using the Data.com Industry Selector (2:56 minutes)	✓	

Video Title	For End Users	For Administrators
Learn how to use the Data.com Industry Selector to navigate easily through extensive industry lists and add industry criteria to your search for accounts or contacts.		

Force.com

Video Title	For End Users	For Administrators
Creating a Workflow Rule (2:50 minutes) Quick demo of how to create a workflow rule in Salesforce.		✓
Visual Workflow Cloud Flow Designer Overview (2:27 minutes) This demo gives you an overview of Visual Workflow's Cloud Flow Designer, the tool for creating flows. With the Salesforce Cloud Flow Designer, you can configure screens and define branching logic for your flows, completely within Salesforce, without writing any code.		✓
Building a Simple Flow (3:30 minutes) Follow along as we create a simple two-screen pledge flow using user input fields and choices. We'll collect users' information, ask them to choose a pledge level, then thank them for their donation.		✓
Importing Accounts Using the Data Loader Command Line Interface (5:20 minutes) Learn how to use the Data Loader CLI to import data into Salesforce.		✓
Using the Developer Console (4:35 minutes) Learn how to use the Developer Console to open and navigate through Apex classes, execute code, test code performance, and inspect objects in memory.		✓

Site.com

Video Title	For End Users	For Administrators
Building a Website with Site.com (3:02 minutes) Learn how to import assets to use in your site, create page templates, apply CSS styles, and add and duplicate site pages using Site.com Studio.	✓	

Video Title	For End Users	For Administrators
Editing and Managing Content with Site.com (2:53 minutes) Learn how to update the content of your website, import files, edit and format text, and add images and links using Site.com Studio.	✔	

Security

Video Title	For End Users	For Administrators
Who Sees What: Overview (4:33 minutes) Learn how you can control who sees what data in your organization.		✔
Who Sees What: Organization Access (4:25 minutes) Learn how to restrict login through IP ranges and login hours.		✔
Who Sees What: Object Access (5:51 minutes) Learn how you can grant users access to objects by using profiles.		✔
Who Sees What: Organization-Wide Defaults (6:36 minutes) Learn how you can restrict access to records owned by other users.		✔
Who Sees What: Record Access via the Role Hierarchy (7:29 minutes) Learn how you can open up access to records using the role hierarchy.		✔
Who Sees What: Record Access via Sharing Rules (4:27 minutes) Learn how you can grant access to records using sharing rules.		✔
Who Sees What: Field-level Security (3:58 minutes) Learn how you can restrict access to specific fields on a profile by profile basis.		✔
Letting Your Salesforce Administrator Access Your Account (1:41 minutes) Learn how you can grant your administrator access to your Salesforce account without distributing your password.	✔	
Removing Users' Access to Salesforce (3:45 minutes)		✔

Video Title	For End Users	For Administrators
Deactivating users in Salesforce removes access to their account data while preserving their historical activity and records. Once you understand why you deactivate users rather than deleting them, learn how to deactivate someone and see what happens to their data.		
Activating Your Computer (1:29 minutes) Learn how to activate your computer so you can log in to Salesforce outside the office.	✓	

Data Import

Video Title	For End Users	For Administrators
Data Import Overview (1:38 minutes) If you're importing data into Salesforce, the Data Import video series is a must-see. This overview video gives a quick glimpse of what each video covers, and lets you use the clickable list of titles to access the videos you're interested in.		✓
Preparing Your Data for Import (4:54 minutes) Learn how to clean up your import files and get Salesforce ready, as well as best practices for keeping data clean once it's been imported.		✓
Cleaning and Preparing Your Data Using Excel (11:27 minutes) Excel offers many features and functions to make quick work of getting your data files ready for import. We'll show you some practical ways to use these features with your import data.		✓
Should I Use Data Loader (6:34 minutes) Learn Data Loader in depth, so you can decide whether it's right for your needs. We compare it to the Import Wizards and also list some other tools you might consider.		✓
Importing Your Data in the Right Order (7:49 minutes) Learn, step by step, which objects should be imported, and when.		✓

Video Title	For End Users	For Administrators
Best Practices for Importing Data (2:47 minutes) Learn the top pain points experienced by our customers, so you can avoid them entirely! This video could save you hours of frustration. We detail how to delete a bad import, how to back up data before import, and more.		✓

See Also:

Printable Tip Sheets & User Guides

How can I sign up for training?

Click **Help & Training** at the top of any page and select the Training tab to sign up for and take training classes. All classes are free and are conducted online by salesforce.com staff. Online training is not included with Personal Edition or Developer Edition.

TROUBLESHOOTING AND SUPPORT

Troubleshooting Login Issues

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

Salesforce makes it easy to log on to the service and to change your password, but you may experience issues if you forget your username or password, or if you're locked out for too many attempts to log on with the wrong credentials. The password policies set up by your administrator determine how many failed logins are allowed, how long lockout periods last, and password requirements such as minimum length.

We recommend changing your password periodically to protect the privacy of your data. If your administrator specifies that user passwords expire on a periodic basis, you'll be prompted to change your password at the end of each period.

- Forgot your password? Retrieve it.
- Locked out? Wait until the lockout period expires and try again, or contact your administrator.
- Password expired? We'll prompt you to change your password. You may also need to reactivate your computer.

Tip: You might want to bookmark theSalesforce login page using the login link you received in your welcome email. If you do create a bookmark, be sure not to accidentally bookmark the Password Reset page instead.

See Also:

Resetting Your Security Token
Retrieving Forgotten Passwords

Resetting Your Security Token

Available in: **All** Editions Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes are not available in **Database.com**

A security token is an automatically generated key that you must add to the end of your password in order to log in to Salesforce from an untrusted network. For example, if your password is `mypassword`, and your security token is `XXXXXXXXXX`, then you must enter `mypasswordXXXXXXXXXX` to log in. Security tokens are required whether you log in via the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.

You are offered a security token if you try to access Salesforce from an untrusted network. Once you have been issued a security token, you have the option to reset this security token at any time.

To reset your security token:

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
   - If you clicked **Setup**, select **My Personal Information** > **Reset My Security Token**.
   - If you clicked **My Settings**, select **Personal** > **Reset My Security Token**.
3. Click the **Reset Security Token** button. The new security token is sent via email to the email address on your Salesforce user record.

If you have never been offered a security token, for example, because your organization restricts the IP addresses from which you can log in, the **Reset My Security Token** node does not appear in your personal settings.

Tip: We recommend that you obtain your security token using the Salesforce user interface from a trusted network prior to attempting to access Salesforce from a new IP address.

Granting Login Access

Available in: **All** Editions

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

Watch a Demo: Letting Your Salesforce Administrator Access Your Account (1:41 minutes)

To assist you, your administrator or a customer support representative may need to log in to the application using your login. You can grant access to them for a specified duration. For security reasons, the maximum period for granting access is limited to one year. During the time you have granted access, they can use your login and access your data to help you resolve any problems.

To grant login access:

1. At the top of any Salesforce page, click the down arrow next to your name. From the menu under your name, select **Setup** or **My Settings**—whichever one appears.
2. From the left pane, select one of the following:
   - If you clicked **Setup**, select **My Personal Information** > **Grant Login Access**.
   - If you clicked **My Settings**, select **Personal** > **Grant Account Login Access**.
3. Set the access expiration date by choosing a value from the picklist.
4. Click **Save**.

If an administrator, support representative, or publisher makes setup changes using your login, the setup audit trail lists those changes, including the username of the delegate user who made the changes.

Note: You may be unable to grant access to certain support organizations due to restrictions set up by your administrator or based on the type of licensing used by a packaged application.

See Also:

Understanding Your Administrator's Role

Retrieving Forgotten Passwords

Available in: **All** Editions

1. Go to `https://login.salesforce.com`.
2. Click **Forgot your password?**.
3. Enter your username and click **Continue**. You'll receive an email at the email address specified on your Salesforce Personal Information page.

4. Click the link provided in the email, answer your password question, and click **Continue**. A temporary password is automatically sent to your email address.
5. Click the link to log in using the temporary password.
6. When prompted, enter a new password.

You might have to activate your computer to successfully log in to Salesforce whenever your password is changed or reset, or when you log in from a computer you have not previously used to access Salesforce.

See Also:

Activating Your Computer
Troubleshooting Login Issues

How can I log Salesforce support cases?

To log support cases, visit the Self-Service Portal. If you require additional assistance, open a case through Customer Support in the Help & Training window.

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